

# *SagePlanner User Guide*

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## **1 Introduction**

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The Sage Planner utility creates an extra calendar tab in the My CRM area of Sage CRM. This calendar adds to the existing calendar functionality by allowing users to view more information about the activity on the graphical display, and providing the ability to view more than one user's calendar simultaneously.

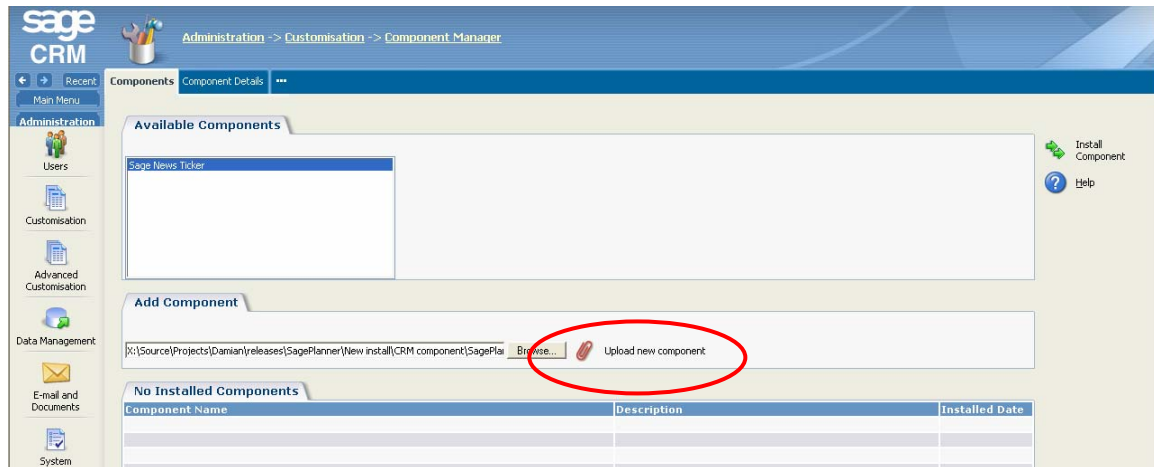


## 2 Installing the SagePlanner

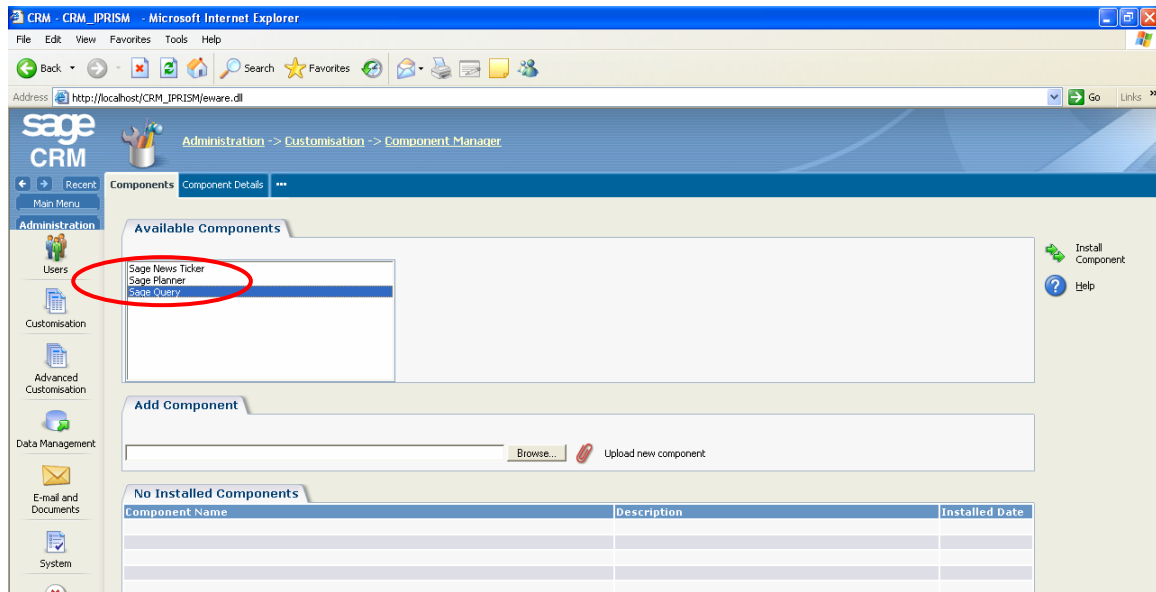
- Log in to Sage CRM as an Administrator
- Go to the Administration Menu, and click Customisation
- Click on the Component Manager:



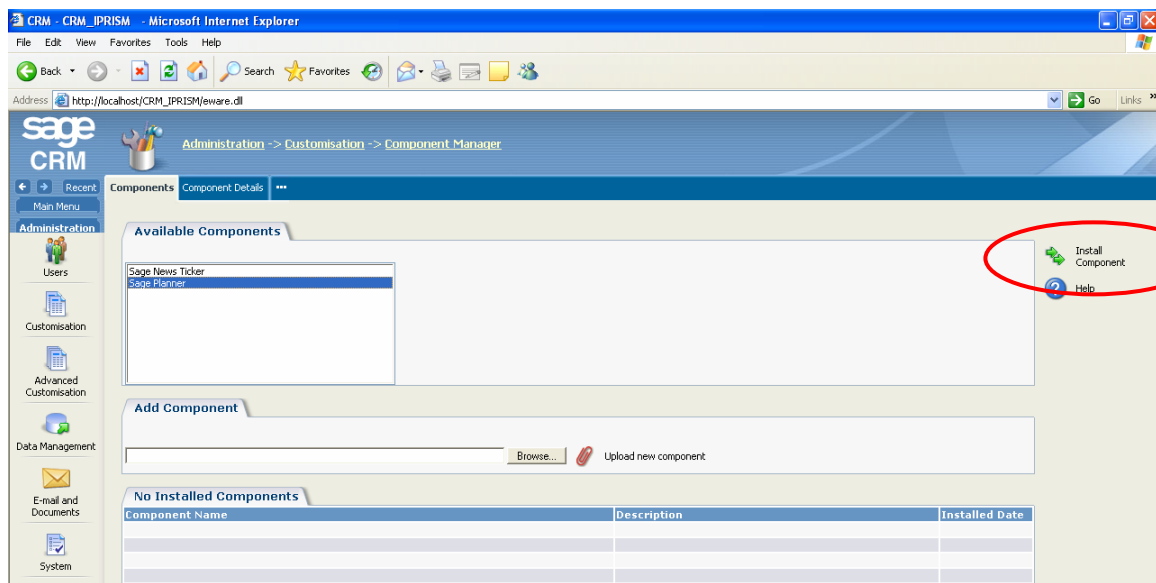
- Click the Browse button and point to where the SagePlanner.zip file was saved
- Click Upload New Component



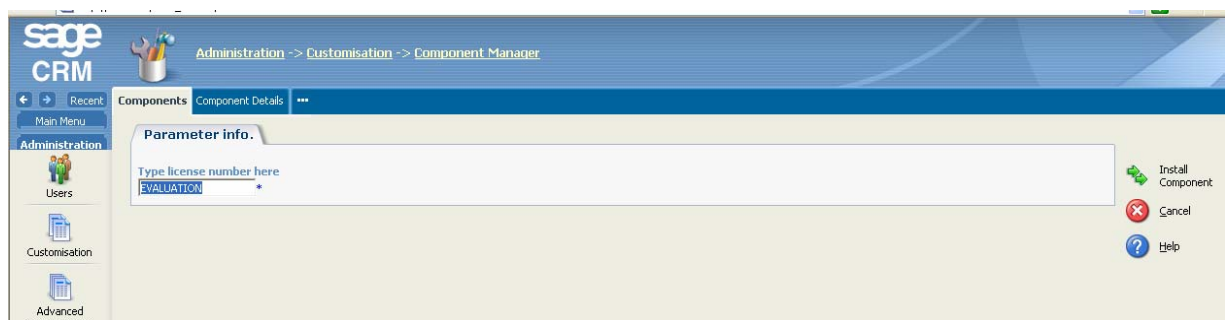
- The Sage Planner will now be visible in the list of Available Components.



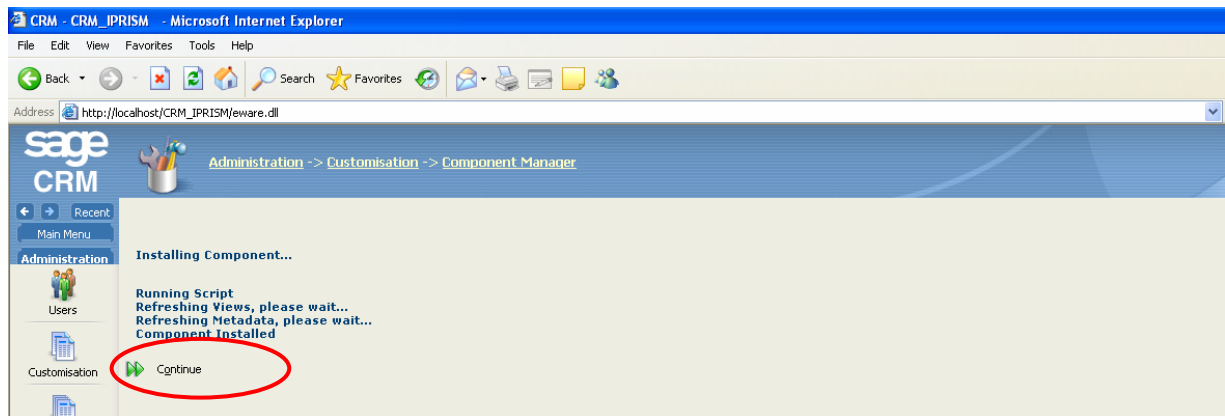
- Highlight the Sage Planner in the list, and click Install Component



- If you have a license for the utility, enter it here. If you do not, leave the word 'EVALUATION' in the window and you will be given a 30 day trial



- Click Install Component
- The installation will run. When it has finished, click Continue



- The component manager will now show the component has been installed

1 Component, Page 1 of 1

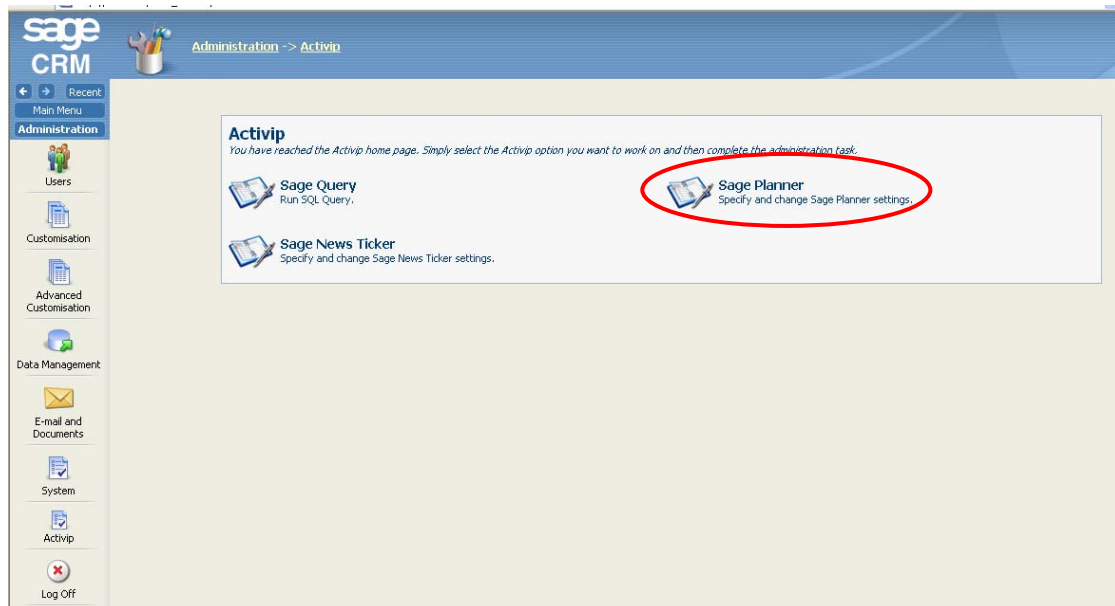
Component Name	Description	Installed Date
SageNewsTicker		Today 15:43

- All users will now need to log out of Sage CRM and log back in to refresh their menu's, in order to view the new utility



### 3 Configuring the SagePlanner

- Log in to Sage CRM as an Administrator
- Click on the **Administration Menu** and select the **Activip** menu item
- Select **Sage Planner**



- The configuration options will be displayed

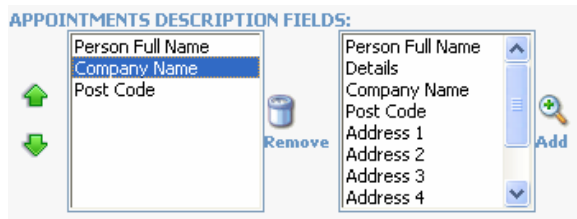


- Click **Change** to update the configuration.
- **CALENDAR VIEW MODE** – Choose between Custom, Day or Week views
- **NUMBER OF VISIBLE DAYS (CUSTOM MODE)** – If Custom View Mode is selected, choose the number of days to be displayed on the calendar (2-7)
- **MULTISELECT OF ACTIONS** – Allows users to use the Ctrl key on their keyboards to select multiple activities
- **(25-75) HOUR SLOT HEIGHT** - Sets the display height of the time slots
- **(100-250) DAY SLOT WIDTH** – Sets the display width of a day on the calendar
- **APPOINTMENTS DESCRIPTION FIELDS** - Select what information you want to display about the appointment on the calendar
- When you have finished making changes, click the **Save** button at the top right of the screen



### 3.1 Changing the Appointment Description fields

- Click **Change** on the Sage Planner Configuration screen.
- In the Appointments Description Fields section there will be two columns

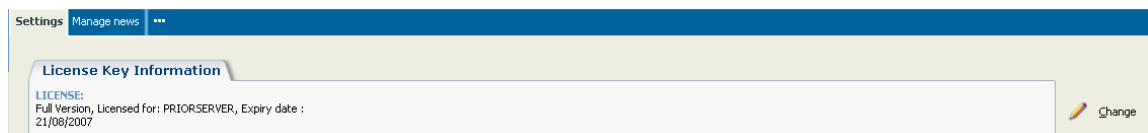


The left column shows the fields that will be displayed on the calendar, and the right column shows all available fields.

- To add a available field, highlight it in the right hand list and click **Add**, you will notice it appear in the left hand column
- To remove a displayed field, highlight it in the right hand list and click **Remove**

### 3.2 Viewing and Updating License Information

- Click **Change** on the Sage Planner Configuration screen.
- Your license type and expiry date will be displayed.

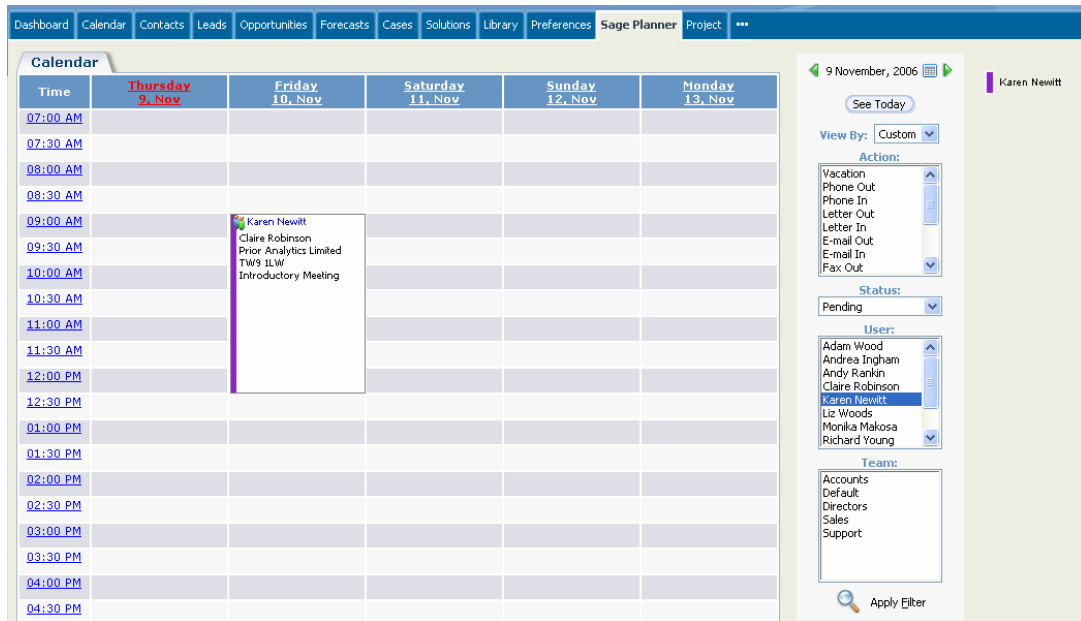


- To update your license, click the Change button on the right of the screen, and enter your new license. Click Save when done, and your license will be updated.

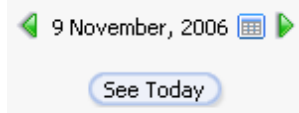


## 4 Viewing and Editing Activities

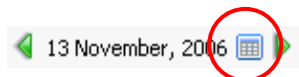
- Log in to My CRM and click the **Sage Planner** tab



- The main calendar is shown in the centre, with a column for each day
- To the right of this, the filtering options are shown, which can be used to change what is displayed on the graphical calendar
- Use the green arrows to move forwards and backwards through different dates, and click See Today to jump back to the current date



- Click on the calendar icon to jump to a specific date with the pop up calendar



- Click once on an activity in the calendar to be taken to the activity details screen
- When in Week view, click once on the date at the top of the calendar to be taken to the day view



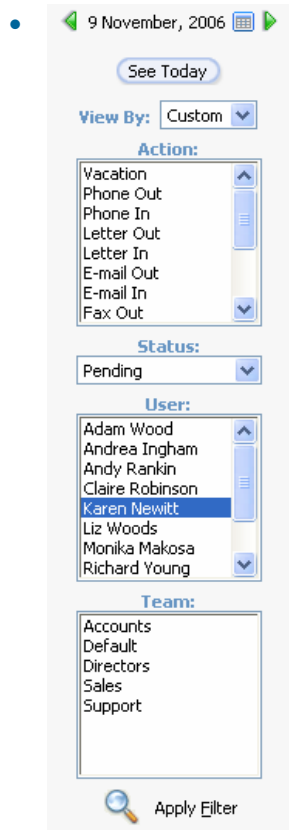
Time	Monday 13, Nov	Tuesday 14, Nov	Wednesday 15, Nov	Thursday 16, Nov	Friday 17, Nov
<a href="#">07:00 AM</a>					
<a href="#">07:30 AM</a>					
<a href="#">08:00 AM</a>					
<a href="#">08:30 AM</a>					
<a href="#">09:00 AM</a>					
<a href="#">09:30 AM</a>					
<a href="#">10:00 AM</a>					
<a href="#">10:30 AM</a>					
<a href="#">11:00 AM</a>					
<a href="#">11:30 AM</a>					
<a href="#">12:00 PM</a>					
<a href="#">12:30 PM</a>					

- When in Day view, click once on the date at the top to be taken to the week view



## 4.1 Changing the calendar display

- There is a list of filtering options to the right of the Sage Planner calendar



- **View By** - allows you to select from a pre-set list of views – Day, Week or Custom. This changes the number of days that are displayed on the calendar at once
- **Action** – select which activities should be displayed. Sage Planner will default to Meetings only, but you can change this from here. Hold the Ctrl key on your keyboard to select multiple activity types
- **Status** – Select if you want to view activities that are Pending, Complete, In Progress or Cancelled
- **User** – Select whose activities you want to view. This will default to the current user, click on a different name to change this. Hold the Ctrl key on your keyboard to select more than one user
- **Teams** – Highlight a team name to view the calendar for all users in that team
- Select the options you want to filter by, then click **Apply Filter**
- If you selected to view more than one users activities, the list of selected users will appear on the far right of the screen. They will each be given a different colour, and the activities on the calendar will be colour coded to indicate the user who is doing that activity.



## 4.2 Scheduling Activities

- Make sure the day you want to schedule the activity for is the first day visible on the calendar (in the left hand column)
- Click on the time on the far left of the calendar that you want your activity to **start**

- The Schedule Activity window will appear, with the start time as you selected on the Sage Planner
- Fill in the other Activity Details as usual and save the activity

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