KORUS CRM | Calendar

Solution description

KORUS CRM | Calendar

KORUS CRM | Calendar is a convenient tool to plan managers' activities in Microsoft Dynamics 365 or Microsoft Dynamics CRM. With this solution, superiors can control staff actions while managers operate via a familiar and intuitive planner interface within CRM. This makes switching between systems unnecessary.

The Calendar displays activities entered into a CRM system in an easy-to-operate format. Users can see several activity types available in the Calendar: task, meeting, and call.

KORUS CRM Calendar is:

- a well-structured visual planner within CRM
- a way to monitor performance of a specific manager or a task group
- a tool to track overdue actions
- a visual system for tracking managers' workload

This solution enables you to:

- track activities by day, week or month
- simplify your scheduling process
- navigate rapidly through the list of actions planned.

STAY UPDATED ON ALL ACTIVITIES WITH KORUS CRM | CALENDAR

SOLUTION FUNCTIONALITY

About the Solution

Calendar filter allows selection among events to display. For instance, users may select to display a specific action type or may filter through all entries by their status (open or closed actions). Moreover, for the ease of user navigation, every activity type has an assigned colour in the general action list. The Calendar has three viewing options: by day, week or month.
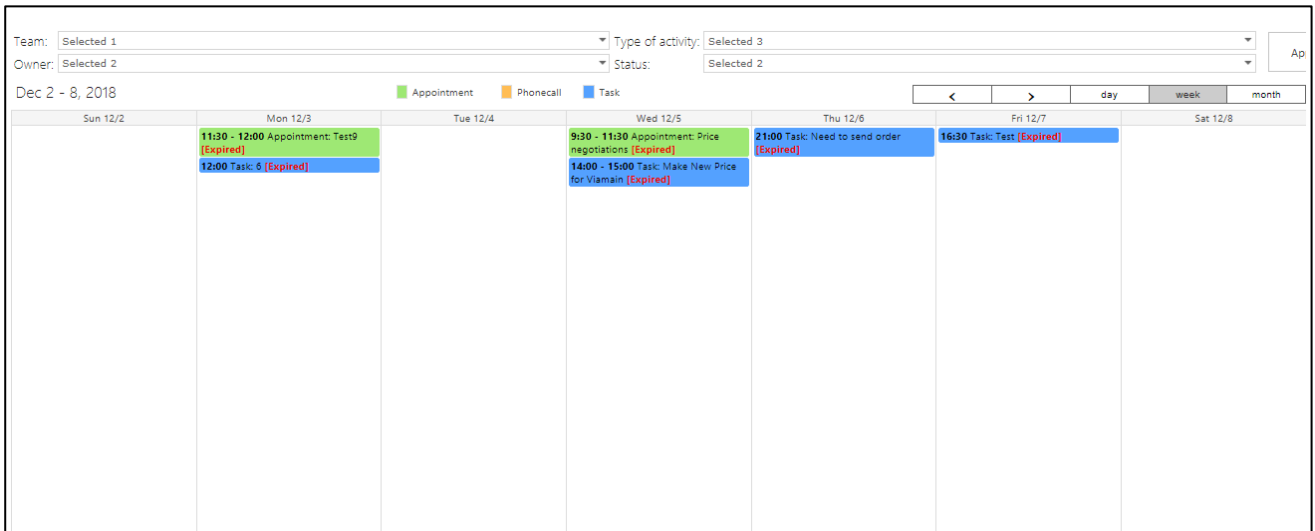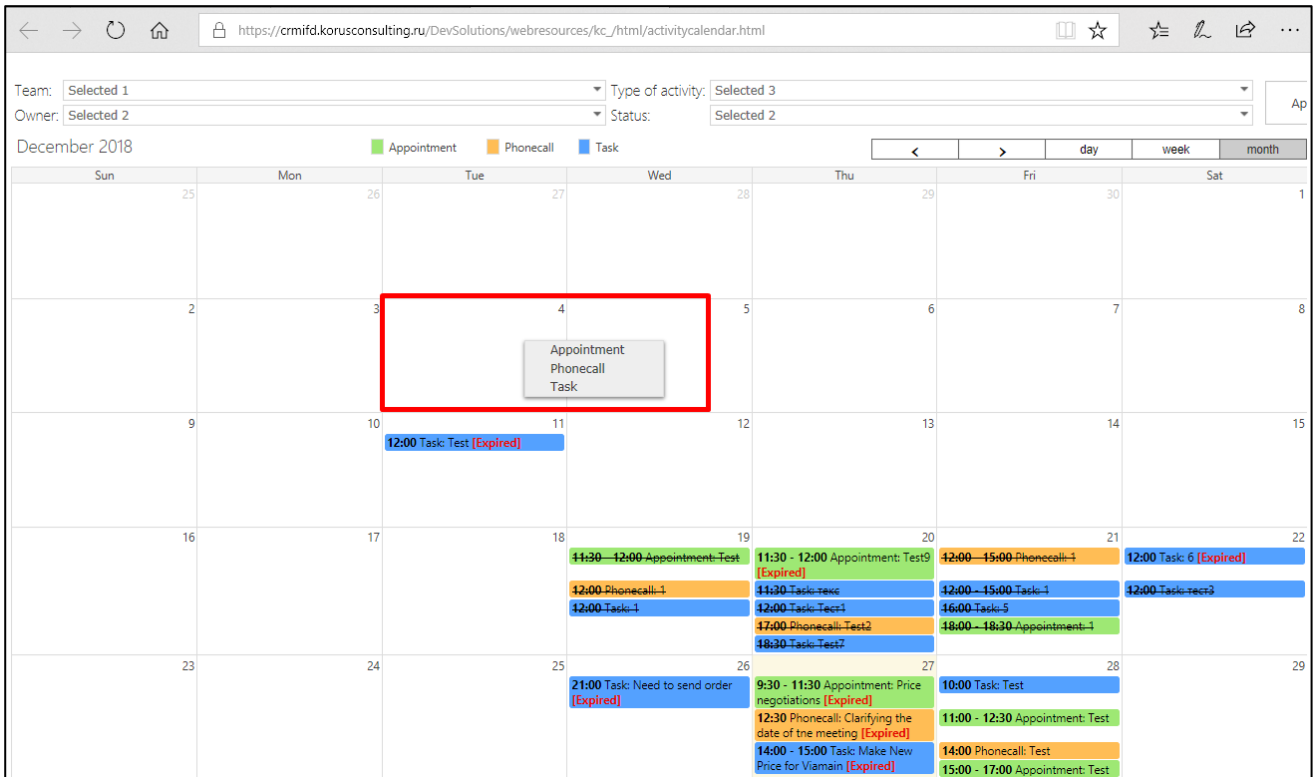
How to View Group's Schedule

In the Calendar, one can simultaneously overview several schedules of specific employees or work groups. For instance, to view schedules of all employees in one's department. User group concept enables customers setting up their user groups as best fits their way of working with the Calendar. Thus, creating and filling of employee schedules becomes a rapidly customized process.
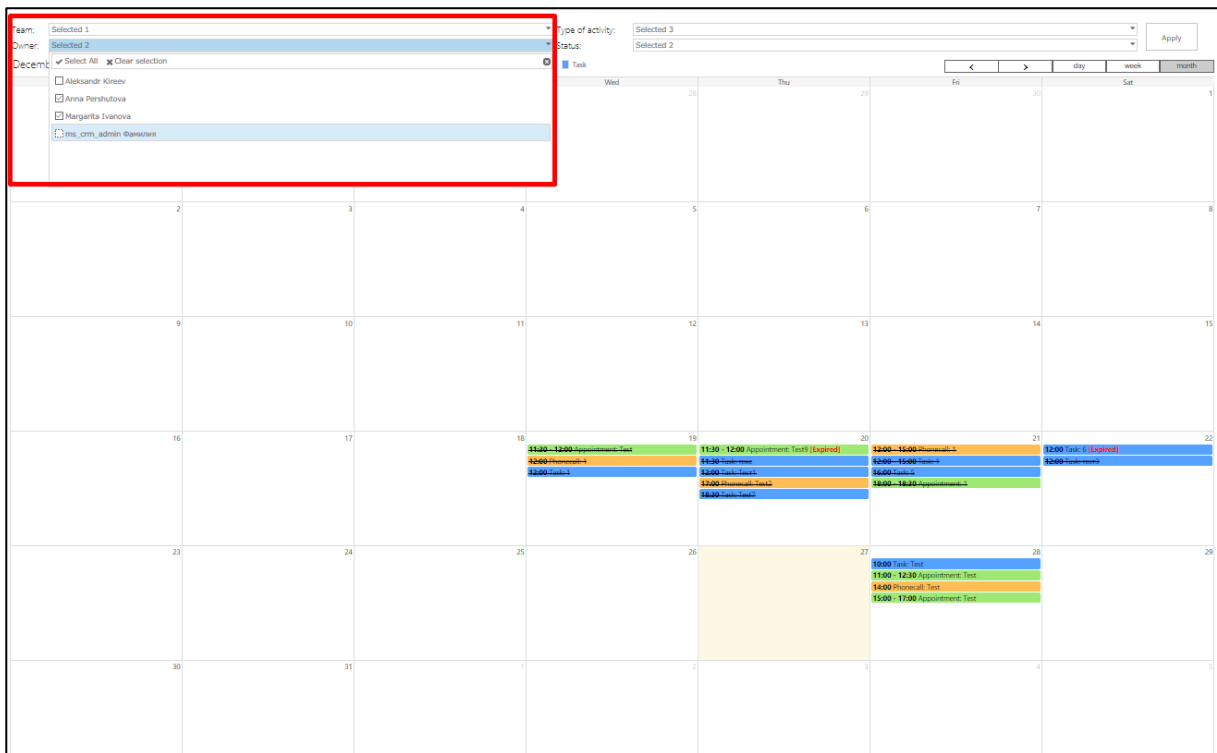
Making Schedules in the Calendar

In addition to viewing, a user can also create new activities in the Calendar. Tasks, meetings, reminders or phone calls are entered into the Calendar with just two clicks by filling information into relevant standard fields.


Management of Activities

The solution supports drag-and-drop function and scheduling becomes an easy process. If you need to change an action's time, just drag the action from the planned date to any other time slot in your calendar. Rescheduling also permits you changing the date but keeping the time of action within a month, week or day.
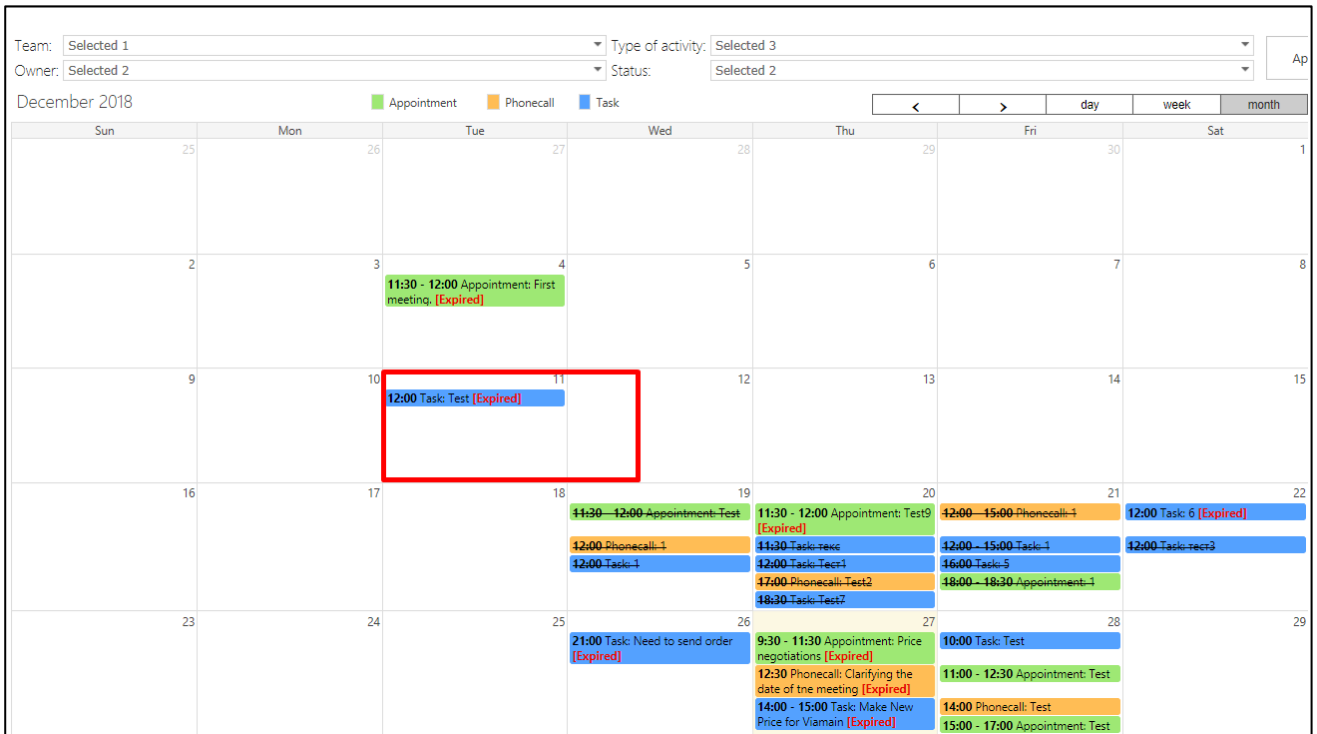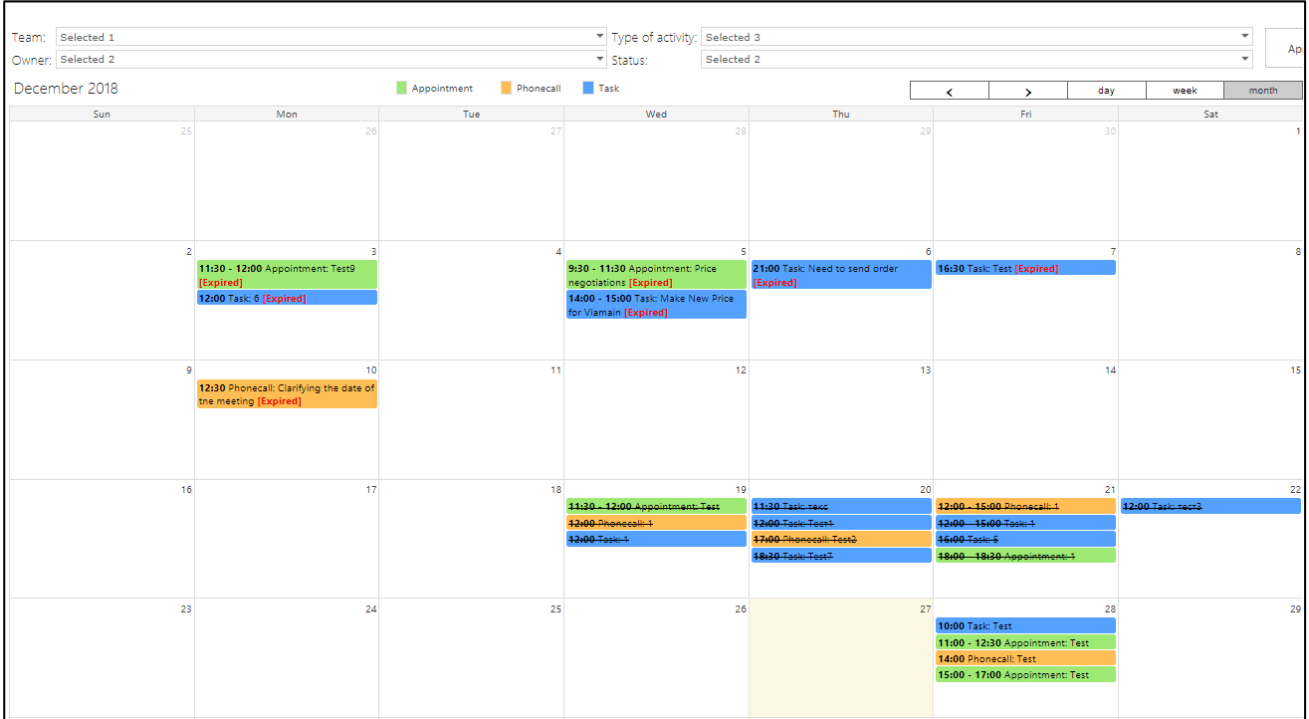
For changing the time manually, you simply need to edit the time and drag the activity into a relevant field.
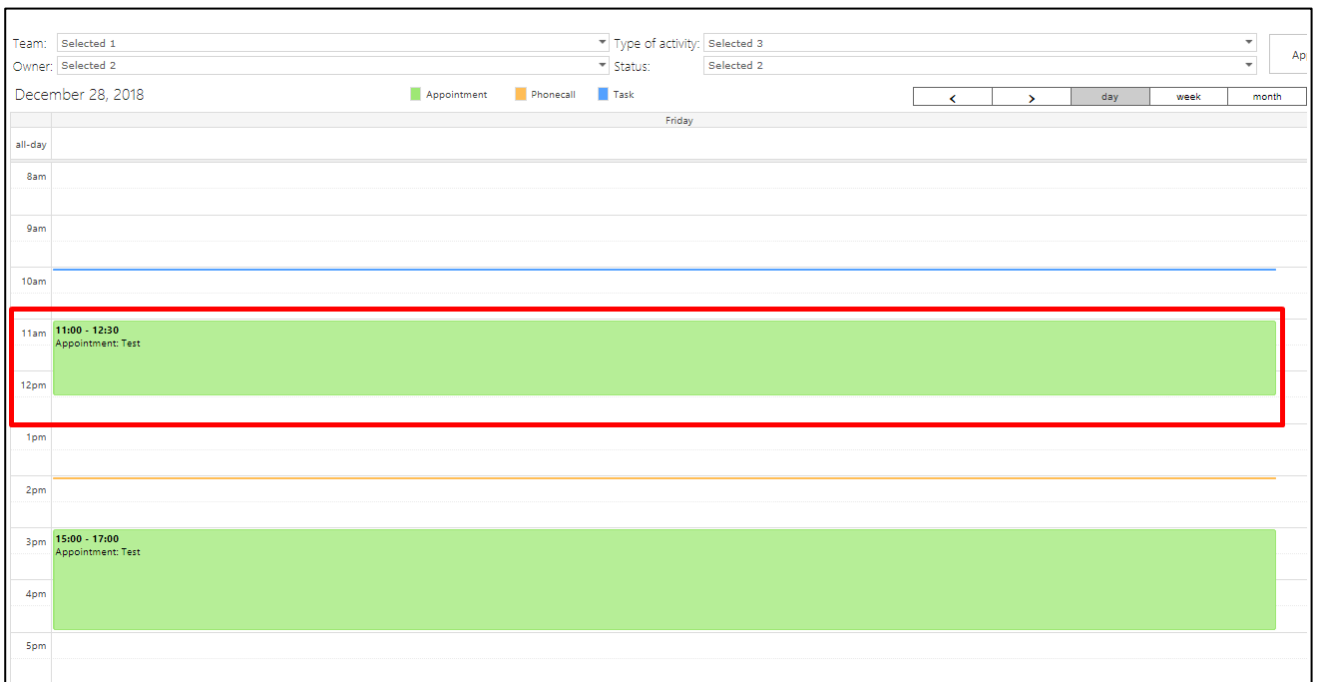
Handling of Overdue Activities

The system allows highlighting overdue records in the Calendar. Actions that are behind their deadlines and not yet closed by managers will be marked "Overdue" on the Calendar screen.

About korus consulting

KORUS Consulting is a Russian system integrator that has offered services in business process automation, IT outsouring and IT infrastructure development **since the year 2000**. The company is an official partner of international and Russian technology vendors such as Alfresco, HP, Cisco Systems, IBM, Manhattan Associates, Microsoft, OpenText, Oracle, SAP, 1C, 1C-Bitrix, etc.

KORUS Consulting has implemented **over 1000 projects** across a spectrum of industries: distribution, logistics, healthcare, retail, construction, transportation, energy, telecommunications, financial services, oil and gas, and public sector. The company has on board 750+ professionals in Moscow and St. Petersburg offices.

Our competitive edge in CRM systems implementation is as follows:

- **KORUS Consulting won** the Microsoft Russia 2018 competition in the Dynamics For Sales (CRM) category.
- **KORUS Consulting is a finalist** in the Microsoft 2018 International Competition in the Dynamics For Sales (CRM) category.
- **KORUS Consulting is the best Russian partner in implementing Microsoft Dynamics CRM 2016, 2013, 2012.**
- **9 years of successful practice** with Microsoft CRM and **18 years** of working with Microsoft products.
- **8000+ users of CRM-solutions** by KORUS Consulting
- **50+ professionals** are employed in CRM Business Unit.

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