

**Team Calendar for GoldMine makes it simple to manage your sales and service teams. See team member's calendars side by side and drag and drop assignments. Quickly assign from project lists and open service cases. Review team utilization in convenient dashboard formats.**

### Configure Multiple Teams

In Team Calendar you can create many teams consisting of various combinations of GoldMine users. You can quickly switch between calendars for different teams to check availability and utilization.

### Daily, Weekly, Monthly and Timeline Calendar Formats

For day to day and for planning purposes you can view your team's calendars in a variety of calendar formats. All calendars are printable in the format they are viewed in.

### Utilization Dashboard

At the press of a button the Team Calendar dashboard pane will provide utilization charts of the current team where you can spot which team members are under or over scheduled.

### User Interface Customization

Each Team Calendar user can customize their calendar views to change text and calendar display properties to fit how they wish to view various types of calendar information.

### Project Manager Integration

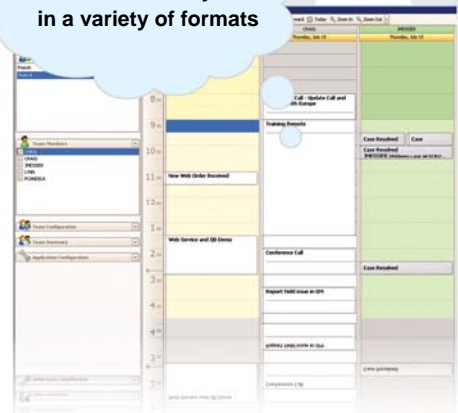
For users of GoldMine Project Management, Team Calendar provides the ability to show open projects and to drag and drop assignments related to a project directly onto the calendar. GoldMine will be updated with activities related to the correct project record.

### Service Center Integration

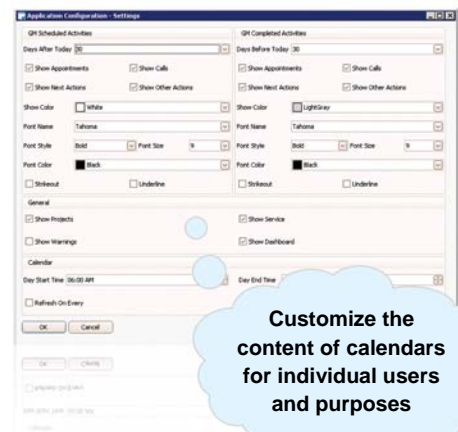
For users of GoldMine Service Center, Team Calendar provides the ability to show open service cases and to drag and drop assignments related to a



View multiple users' calendars side by side in a variety of formats



Customize the content of calendars for individual users and purposes



service case directly onto the calendar. GoldMine will be updated with activities related to the correct case record.

### Team Calendar for Use in Service Dispatch Centers

When you manage teams of service technicians Team Calendar takes the place of a dispatch board or other scheduling mechanism. The dispatcher can quickly see the availability of all technicians side by side. The dispatcher can assign and reassign service appointments by dragging and dropping activities between users on the calendar. If you use GoldMine's Service Center, you can drag an open case on to a users calendar to assign an appointment related to a case to a specific service technician. Technician's calendars can be printed and delivered to the technician.

### Team Calendar for Use with Field Sales Force Management

If you have an inside sales team making appointments for outside sales representatives, Team Calendar becomes an invaluable tool to quickly review the availability and utilization of your sales force. Since Team Calendar is integrated with GoldMine, new appointments added via Team Calendar are immediately available on the sales reps GoldMine calendar.

### Team Calendar for Use with Project Management

When managing projects in GoldMine Team Calendar allows project managers to view open projects in need of assignments. The project manager can drag a project onto a user's calendar to assign an activity related to a project. The project grid tool in Team Calendar effectively shows projects with related next and previous activities from the calendar.

The screenshot shows the 'Teams' window with 'French Team A' selected. A callout bubble says 'Configure multiple teams with selections of team members'. Below is the 'Team Member' window with a list of members: CHRIS, CRAIG, JMESSIER, LYNN, and PCANDELA, all with checked boxes. Below that is a timeline view showing a grid of time slots (9:00 A, 9:30 A, 10:00 A, 10:30 A, 11:00 A, 11:30 A, 12:00 P, 12:30 P, 1:00 P, 1:30 P, 2:00 P, 2:30 P, 3:00 P) for multiple users. A callout bubble says 'Timeline view is an effective view of longer time periods and many users' calendars.'

The screenshot shows a 'Team Team West Utilization / Saturday, September 04, 2010 - Monday, October 04, 2010' dashboard. It features a grid with green bars representing utilization levels for different users. A callout bubble says 'Utilization Dashboards allow you to quickly see users who are under or over utilized.'

## REQUIREMENTS

- GoldMine version 6.7 or higher, Corporate or Premium Editions
- Windows XP or higher
- Microsoft .Net 2.0



W-Systems Corp.  
19 Spear Road  
Suite 101  
Ramsey, NJ 07446  
[www.w-systems.com](http://www.w-systems.com)  
(800)775-8378 +1(201)760-2565