SugarCRM Collaboration

April 28, 2009

SUGARCRM.

Improve Communication and Information Sharing

COLLABORATION

| Email Client | Project Management | Wireless & Offline Client | Outlook Plug-In | Activity Management |

- Share calls, meetings, documents, calendars and email
- Integrate Sugar with popular applications such as Microsoft Outlook
- Allow workers to access CRM in mobile and offline settings
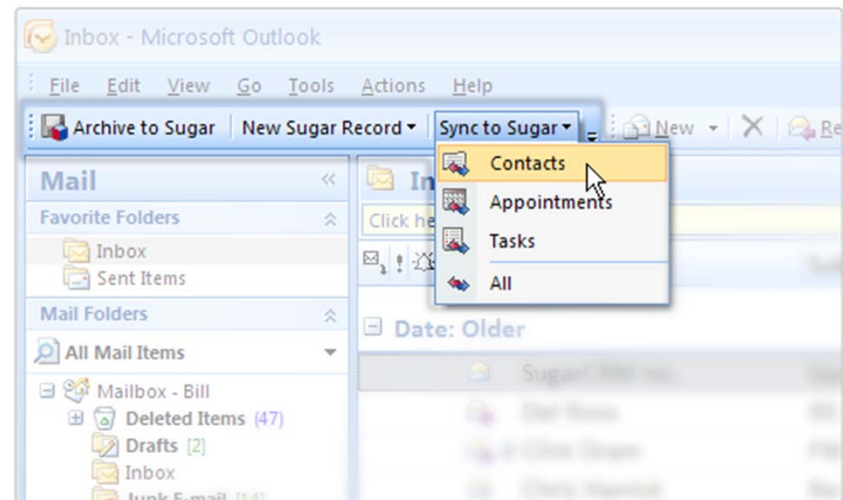
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SugarCRM Collaboration

| Issues	Solution	Impact
Poor coordination across teams	▪ Shared calendaring, meetings, and calls, integrated with Microsoft Outlook ▪ Project Management for coordinating complex projects across teams	**Better customer communication across lines of business**
Information scattered across applications	▪ New Email client helps consolidate customer information ▪ Sugar Plug-In for Outlook synchronizes information	**A single, integrated view of customer interactions**
Sales reps are mobile, information is not	▪ Offline Client Synchronization allows employees to continue to work offline ▪ Wireless device access from any smart phone lets reps work on-the-go	**Spend more time with customers and less time updating information**

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Email Client

- Brand new AJAX UI
- Support for folders, personal inboxes
- Reduces toggling/sync between applications
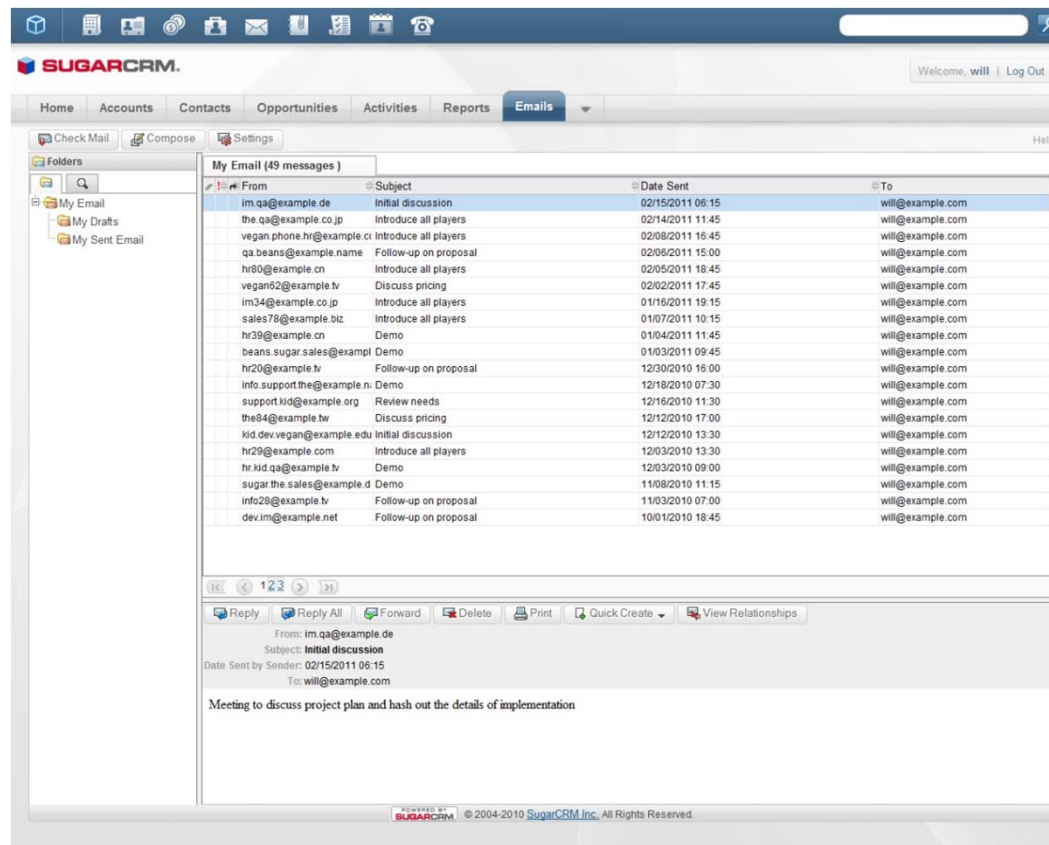
Project Management

- Build and manage projects across teams
- Create projects from pre-defined templates
- Monitor activity and dependencies with Gantt Charts
- Manages upcoming tasks, open items, percentage completion, open cases, etc.
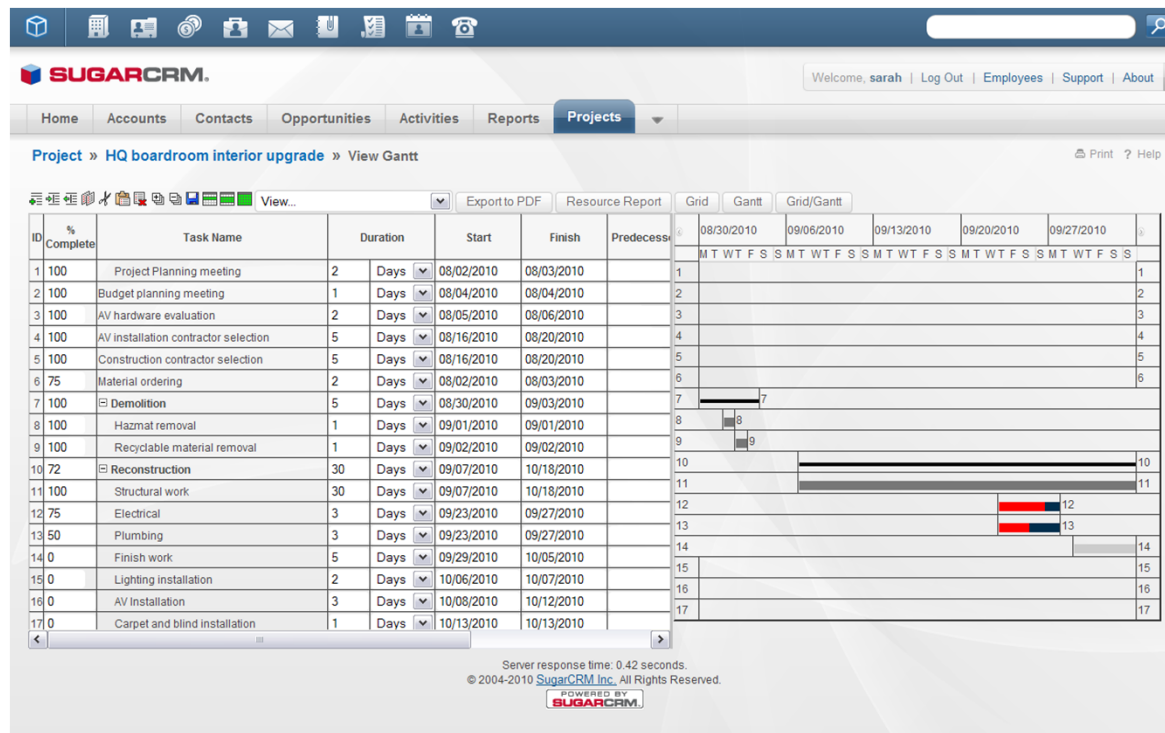
Mobile and Offline

- Improve sales productivity with mobile access solutions
- Access Sugar from any smart phone or PDA
- Work offline and update Sugar information automatically when you return to the network
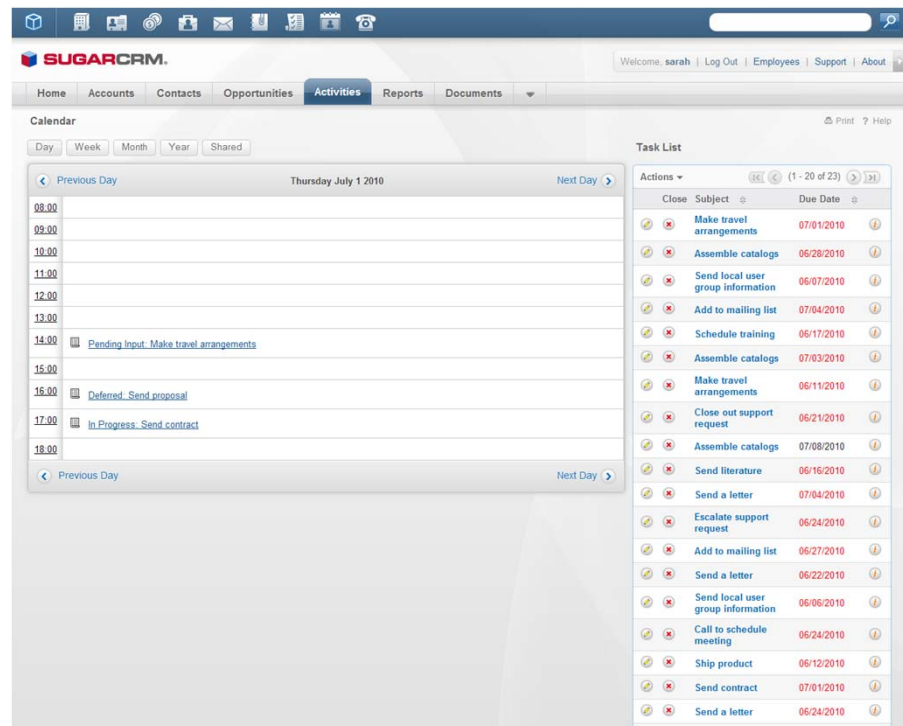
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Sugar Plug-In for Microsoft Outlook

- Capture important customers communications within Sugar
- Ensure calendar and e-mail are coordinated between desktop and Sugar
- Eliminate redundant information
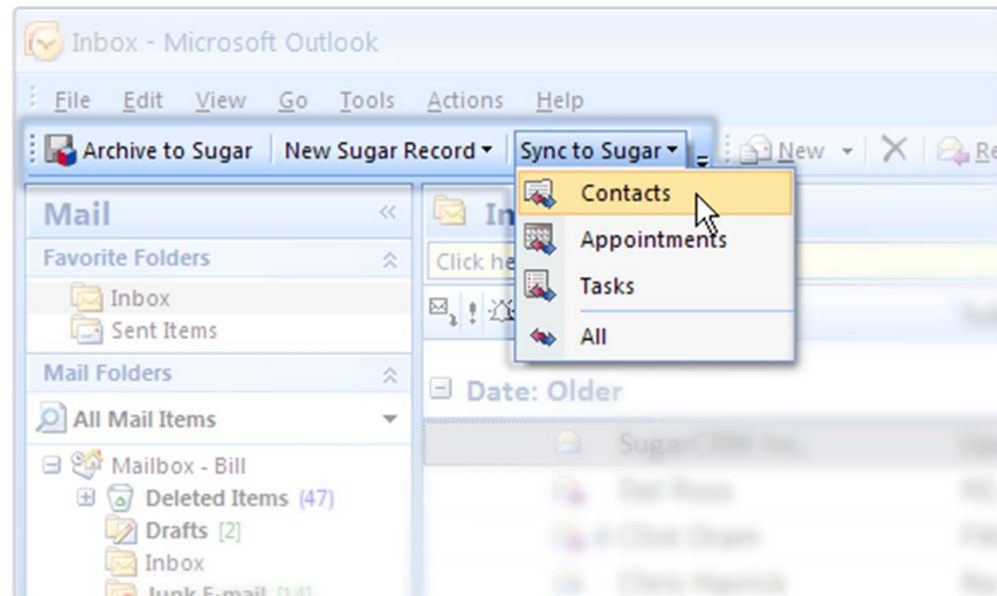
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Activity Management

- Manage calendar, calls, meetings, tasks and email in a single location
- Create and assign activities to individuals or teams
- Receive reminders and alerts about important activities

Activity Reports

- Monitor the number of activities (calls, meetings, demonstrations) by rep and sales stages
- Send reminders on opportunities based on time or status change

CALLS BY TEAM BY USER

Total is 2,820

Demo	865
Discuss pricing	288
Follow-up on proposal	270
Initial discussion	311
Introduce all players	812
Review needs	274

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