



SugarCRM Platform

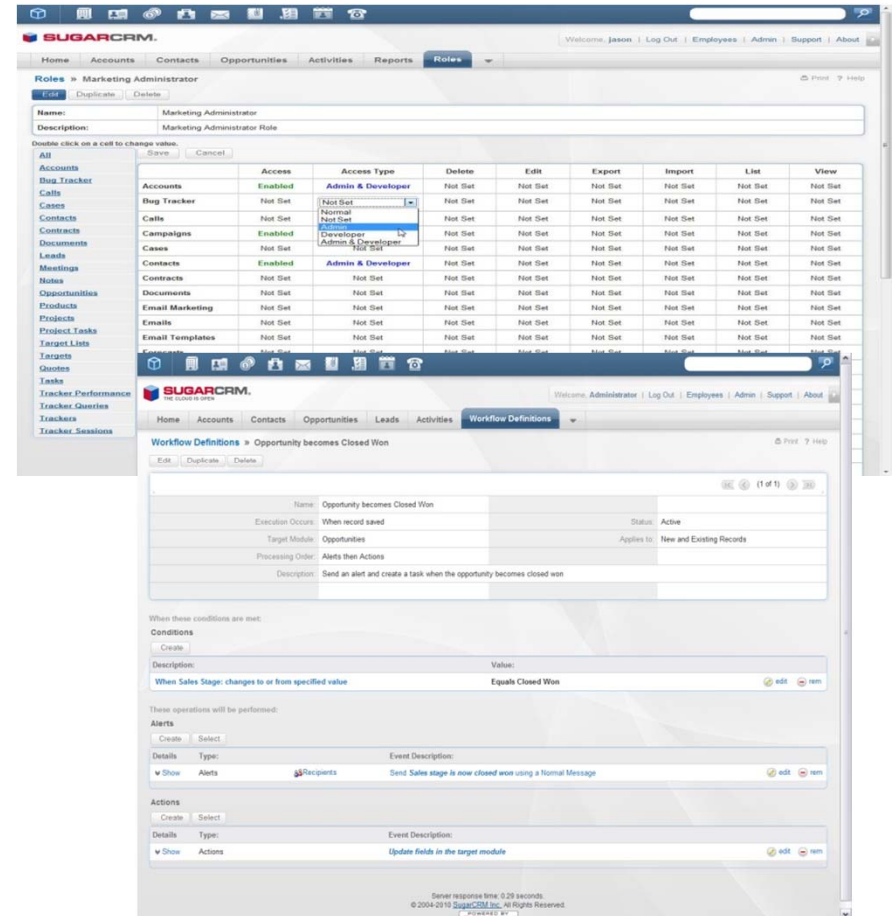
June 6, 2011



Create Powerful Business Processes Easily



- Create custom fields, objects and modules
- Design workflow processes to fit your business
- Control visibility and access at the field level



Role Management and Access Control

- Controls visibility and change privileges
- Admin defines role and assigns employees to a role
- Protects sensitive information and ensures data quality

The screenshot shows the SugarCRM interface for managing roles. The 'Roles' menu is selected, and the 'Marketing Administrator' role is being viewed. The interface includes a navigation bar, a search bar, and a sidebar with various module links. The main content area displays a table of access permissions for the 'Marketing Administrator' role. The table has columns for 'Access', 'Access Type', 'Delete', 'Edit', 'Export', 'Import', 'List', and 'View'. A dropdown menu is open over the 'Access Type' column for the 'Bug Tracker' row, showing options: 'Normal', 'Not Set', 'Admin', 'Developer', and 'Admin & Developer'.

	Access	Access Type	Delete	Edit	Export	Import	List	View
Accounts	Enabled	Admin & Developer	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Bug Tracker	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Calls	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Campaigns	Enabled	Admin & Developer	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Cases	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Contacts	Enabled	Admin & Developer	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Contracts	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Documents	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Email Marketing	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Emails	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Email Templates	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Forecasts	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Forecast Schedule	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Knowledge Base	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Leads	Enabled	Admin & Developer	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Meetings	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Notes	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Opportunities	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Products	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Projects	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set

Workflow

- Controls information flow within the company
- Create custom processes based on company needs
- Define alerts, triggers and actions to ensure follow-up

The screenshot displays the SugarCRM interface for defining a workflow. The main navigation bar includes Home, Accounts, Contacts, Opportunities, Leads, Activities, and Workflow Definitions. The current view is 'Workflow Definitions' with a sub-view for 'Opportunity becomes Closed Won'. The workflow details are as follows:

Name:	Opportunity becomes Closed Won	Status:	Active
Execution Occurs:	When record saved	Applies to:	New and Existing Records
Target Module:	Opportunities		
Processing Order:	Alerts then Actions		
Description:	Send an alert and create a task when the opportunity becomes closed won		

When these conditions are met:

Conditions

Create

Description:	Value:	
When Sales Stage: changes to or from specified value	Equals Closed Won	edit rem

These operations will be performed:

Alerts

Create Select

Details	Type:	Event Description:	
Show	Alerts	Send Sales stage is now closed won using a Normal Message	edit rem

Actions

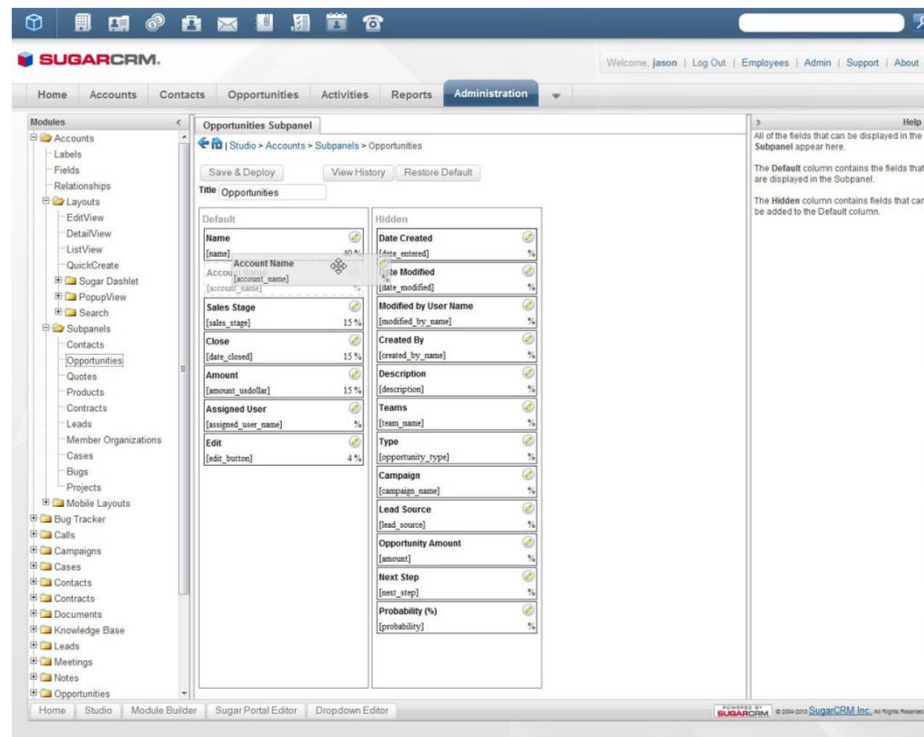
Create Select

Details	Type:	Event Description:	
Show	Actions	Update fields in the target module	edit rem

Server response time: 0.29 seconds.
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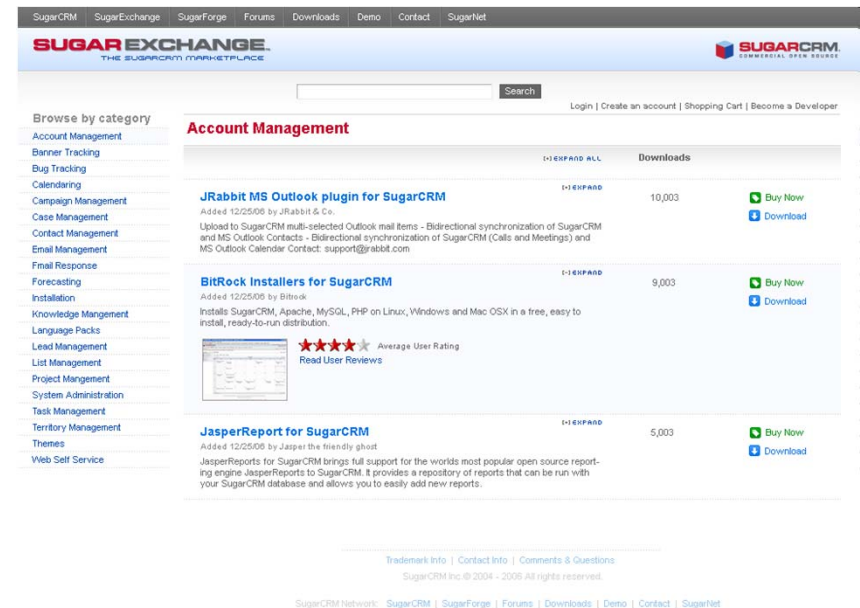
Layout Editor

- Studio wizards allows administrators to changes tabs, drop-down values, workflow rules and custom fields
- Drag-and-drop editor with preview and revert changes
- Fully upgradeable to newer versions



Module Builder and Loader

- Create your own custom module using Sugar Business Logic
- Associate multiple Sugar Objects (Projects, Accounts, Cases) in a single view
- Choose from hundreds of different projects across a broad range of categories from Sugar Exchange and Sugar Forge



The screenshot displays the Sugar Exchange marketplace interface. The top navigation bar includes links for SugarCRM, SugarExchange, SugarForge, Forums, Downloads, Demo, Contact, and SugarNet. The main header features the Sugar Exchange logo and a search bar. A sidebar on the left lists various categories under 'Browse by category', including Account Management, Banner Tracking, Bug Tracking, Calendaring, Campaign Management, Case Management, Contact Management, Email Management, Email Response, Forecasting, Installation, Knowledge Management, Language Packs, Lead Management, List Management, Project Management, System Administration, Task Management, Territory Management, Themes, and Web Self Service. The main content area is titled 'Account Management' and lists several modules:

Module Name	Downloads	Actions
JRabbit MS Outlook plugin for SugarCRM Added 12/25/09 by JRabbit & Co. Upload to SugarCRM multi-selected Outlook mail items - Bidirectional synchronization of SugarCRM and MS Outlook Contacts - Bidirectional synchronization of SugarCRM (Calls and Meetings) and MS Outlook Calendar Contact: support@rabbit.com	10,003	Buy Now Download
BitRock Installers for SugarCRM Added 12/25/09 by BitRock Installs SugarCRM, Apache, MySQL, PHP on Linux, Windows and Mac OSX in a free, easy to install, ready-to-run distribution.	9,003	Buy Now Download
JasperReport for SugarCRM Added 12/25/09 by Jasper the friendly ghost JasperReports for SugarCRM brings full support for the worlds most popular open source reporting engine JasperReports to SugarCRM. It provides a repository of reports that can be run with your SugarCRM database and allows you to easily add new reports.	5,003	Buy Now Download

At the bottom of the page, there is a footer with links for Trademark Info, Contact Info, and Comments & Questions, along with copyright information for SugarCRM Inc. © 2004 - 2009. The SugarCRM Network logo is also present at the bottom right.

Homepage Layout and Dashlets

- Configure homepage to display only information relevant to your job
- Create multiple dashlets based on Sugar modules or outside data sources
- Edit the information display of any dashlet

