



SUGAR ENTERPRISE™ delivers advanced Customer Relationship Management (CRM) functionality to companies who place a premium on flexibility and control. Business users will find an easy-to-use tool to manage interactions across the customer lifecycle. Executives will find a full set of reporting tools to ensure they have the information necessary to make informed decisions. For IT managers, Sugar Enterprise places a premium on flexibility with full set of tools for system management, customization and integration.

**A complete suite of sales, support, marketing and collaboration features**



**Advanced customization and integration capabilities deliver end-to-end business processes**



**Portal capabilities extend Sugar to incorporate customers and partners**



**Sugar Open Cloud technology provides testing and management services to ensure quality and reliability.**

### **Custom CRM**

No two CRM implementations are the same. To gain competitive advantage, companies must adapt the CRM system to match how their business functions. Within Sugar, a robust set of configuration options exists to tailor screens and navigation, and even to add new modules—with no coding necessary. With Sugar Module Builder, non-technical administrators can create custom modules from Sugar object templates and relate them to existing Sugar modules to track information important to the organization. These customizations, as well as any others performed in the Sugar Studio environment, are fully upgrade-safe.

### **Composite Applications**

SugarCRM® recognizes that integration with existing core systems is a key factor in your deployment success. Sugar Web Services allow companies to easily connect Sugar Enterprise to their existing IT environment, or directly access the Sugar Enterprise database. SugarCRM's meta-data driven user interface ensures a smooth transition to future versions.

### **For the Extended Enterprise**

In addition to a full set of sales, marketing, support and collaboration features, Sugar Enterprise allows companies to expose key CRM data elements through the Self-Service Portal. By allowing customers to access key account, support and entitlement information, Sugar Enterprise helps companies reduce support costs while staying aligned with customers.

### **In Control of the Cloud**

Sugar Enterprise delivers a cloud computing environment within the product. Cloud Console allows companies to create, test, deploy and manage multiple instances of Sugar Enterprise. With Sugar Cloud Console, companies gain greater control over how their CRM systems are deployed and managed. Based on the Sugar Open Cloud technology that has been developed and refined over five years, companies gain more control and flexibility of customer-focused business processes.

*“SugarCRM helps us improve our relationship with our customers as we are able to provide better service and a more efficient sales operation.”*



**Geovariances**  
Where no one has gone before



## FEATURES

### Sales Force Automation

- Leads
- Contacts
- Opportunities
- Accounts
- Activities
- Documents
- Sales forecasting
- Contracts
- Product catalog
- Quotes

- Monthly pipeline by outcome dashboard
- Opportunities by lead source dashboard
- Customizable dashboards
- Custom reports
- Multiple dashboards on homepage
- Advanced reports
- Advanced charts
- SQL reporting

### Customization

- Module builder
- Custom fields
- Custom objects
- Custom modules
- Custom record types
- Drag-and-drop custom layouts
- Configure tabs
- Assignment notification
- Workflow automation rules

### Marketing Automation

- Campaigns
- Email marketing
- Online lead capture
- Web-to-Lead forms
- List management
- Newsletter management
- Campaign dashboard
- Marketing reports

### Collaboration

- Activity management
- Document management
- Shared calendar
- Employee directory
- Project management
- Ajax email client
- Sugar Plug-in for Microsoft Outlook
- Sugar Plug-in for Microsoft Word
- Advanced project management (Gantt Charts and Grids)
- Reminders and alerts
- Team notices
- Dynamic teams

### Migration

- Data import and exports
- Import de-duplication
- Upgrade wizard
- Data quality controls

### Customer Support

- Case management
- Bug tracking
- Email management
- Case escalation and queuing
- Knowledgebase
- Advanced case escalation and notification
- Customer self-service portal

### Mobile

- Wireless edition
- PDA edition
- Customized mobile views
- Offline client synchronization

### Integration

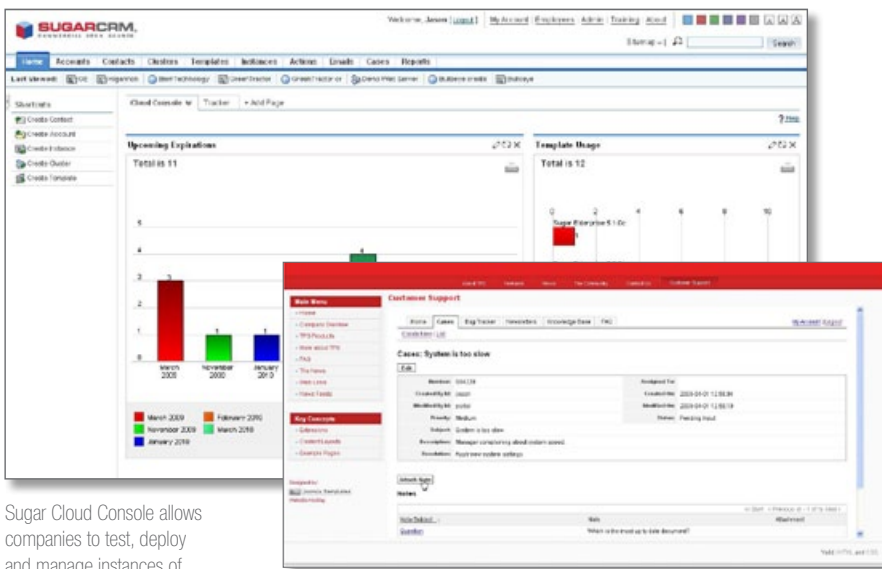
- Custom links
- Web-services API
- Sugar Feeds Dashlets
- Cloud Connectors
- My Portal Dashlet
- Module Loader
- Cloud Connectors Data Merge
- Oracle support

### Security

- Access control by user role
- Access control by team
- Field-level security
- Module Administration
- Advanced password management

### Reporting

- Sales pipeline dashboard
- Lead source dashboard



Sugar Cloud Console allows companies to test, deploy and manage instances of Sugar Enterprise.

Self-Service Portal allows companies to expose select CRM data to customers, reducing support costs and increasing customer satisfaction.

*"Using Sugar Enterprise, we've been able to take our service levels to new heights."*



### About SugarCRM

SugarCRM is the world's leading provider of commercial open source customer relationship management (CRM) software. Founded as an open source project in 2004, SugarCRM applications have been downloaded over five million times and currently serve over 600,000 users in 80 languages. Over 6,000 customers have chosen SugarCRM's On-Site and Cloud Computing services over lock-in based, proprietary alternatives. In the last year, SugarCRM has been recognized for its customer success and product innovation by CRM Magazine, InfoWorld, Customer Interaction Solutions and Intelligent Enterprise.



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