



SugarCRM: Smart and effective Customer Relationship Management

What is CRM?

Customer Relationship Management (CRM) refers to a comprehensive way of managing relationships with your current and prospective customers and other business partners.

An effective customer relationship management system needs to be able to:

- capture information about your interactions with current or prospective customers;
- facilitate information sharing and collaboration among your teams;
- provide tools to manage your daily customer relationship activities such as a Calendar, E-Mail, and ways of managing meetings/calls/tasks to enable automation of your sales, marketing and customer services processes;
- provide insights into your business past, present and future.

What are the benefits of having a CRM system?

Customers with successful CRM systems report increased revenues, better profit margins, lower costs to attract and retain customers, higher customer satisfaction, and smoother, more efficient workflows.

Some specific benefits include:

- shorter sales cycle,

- more effective management of sales leads and pipelines,
- improved productivity,
- more accurate forecasts,
- more timely responses to customers and other organisations,
- improved customer services,
- greater cross-sales and up-sales success,
- reduced dependence on any particular sales persons,
- more-efficient call centre operations,
- higher visibility into businesses, and
- more informed marketing decisions.

What is SugarCRM?

SugarCRM is a web-based CRM system, allowing you to access your business and customer information from anywhere with an Internet connection, including mobile phones with a data plan.

SugarCRM is now one of the leading CRM systems in the world with comprehensive features and functions at prices affordable by small and medium-size businesses. More than 50,000 companies and 500,000 users globally have adopted SugarCRM for its powerful features, affordable prices, accessibility to source codes (which facilitates customisation), and flexible deployment options.

SugarCRM offers different editions with features

and prices suitable for companies from SOHO to Enterprise. SugarCRM customers include CocaCola, AXA Insurance and Avis Car Hire.

SugarCRM has comprehensive features at competitive prices

With SugarCRM, you can:

- **Manage your daily activities efficiently**

You can keep records of your daily activities including meetings, phone calls, emails, tasks and support cases related to your current or prospective customers. You can also schedule your activities with optional reminders or email alerts.

- **Facilitate information sharing and collaboration among your teams**

SugarCRM acts as a central portal for your team to keep records, share and access information about your customers or prospects.

Sugar's Document and Knowledge Base modules also allow organisations to share common documents/templates and specific knowledge/FAQs. Calendars can also be shared among authorised members.

- **Provide a 360° view of your customers**

By going to a customer or prospect's records, you can easily view all related information including email correspondence, meetings, calls, tasks, cases or transaction histories.

- **Automate your sales, marketing and customer services processes**

Email notifications, user assignment, and entry field updates can be automated with customised business rules. You can create your own workflow rules to automate your process based on your organisations' unique requirements. For example, an email notification can be sent to a manager if a support case is not handled within a specified period.

- **Manage customer support effectively**

The Case module provides a central portal for all customer support activities. Email replies can be automatically generated when a support request is received or a support case is updated.

- **Manage and run marketing campaigns**

You can launch marketing campaigns, including email or newsletter campaigns, from Sugar. You can also evaluate your campaign effectiveness with Sugar's campaign statistics such as click-through rate, email opening rate, rate of conversion to leads, and ROI.

- **Capture leads from your website**

Sugar can create web-to-lead forms to be incorporated and published in your website. Leads can be automatically generated in SugarCRM for any registration or enquiries from the online form.

- **Monitor and manage your business opportunities and make forecasts easily and effectively**

Sugar's Opportunities module allows you to record and monitor potential business opportunities. Forecasts can be automatically generated based on sizes and expected closing dates of the opportunities.

- **Create quotes and manage quote status**

The Sugar Quote module allows users to create and manage quotes within Sugar and send quotes to customers in PDF format. Each quote is linked to an associated account, providing a clear view of transaction histories with your customers.

"Thanks to SugarCRM's Open Source heritage, SugarCRM software packages are very competitively priced"

- **Provide overviews and insights into key aspects of your business**

Sugar Dashboards provide you with various graphic views of key statistics of your organisations. You can also generate your own customised reports to evaluate your business performance.

- **Manage your team's SugarCRM access privileges easily**

You can create Access Control privileges for users and customise rules to determine the scope under which each member or team can access Sugar. This can include rights to view, edit, export, import, or delete a particular record or module.

- **Manage RSS feeds or favourite websites**

Sugar's RSS module allows users to manage and receive RSS feeds from their favourite sources. Users can also use the My Portal module to publish, manage and access preferred websites.

- **Customise based on your needs easily**

Sugar is easily customisable without any programming skills. With Sugar Studio, you can create your own customised fields or change the layout to suit your organisations' requirements. You can even build your own module via the Module Builder.

"You can create your own customised entry fields or change the layout to suit your organisation's needs"

- **Synchronise with Microsoft Outlook**

SugarCRM comes with a powerful Email module where you can send, receive and manage individual emails and group shared emails.

However, the Sugar Outlook plug-in also allows you to use Microsoft Outlook concurrently with SugarCRM if you so prefer. You can continue using Outlook and archive emails into Sugar.

You can also synchronise your emails, contacts, tasks and calendar between SugarCRM and Outlook. Additionally, the Sugar Word plug-in allows you to create large mail merges using data from SugarCRM.

- **Access from anywhere**

Sugar is a web-based system. You can access Sugar through a web browser wherever you have an Internet connection. The Sugar Wireless Solution also allows you to access Sugar remotely using your mobile phones.

- **Choose either hosted or on-premises deployment**

SugarCRM can be deployed as either an "on-demand" hosted service requiring no hardware maintenance, or be installed on-site at the organisation's premises using dedicated hardware.

- **Enjoy all at competitive prices with faster improvement cycles**

Thanks to SugarCRM's Open Source heritage, SugarCRM software packages are very competitively priced, in many cases, 30% to 70% lower than products of similar features.

As part of the Open Source development process, SugarCRM authors and distributes their software to a community of more than 2000 developers worldwide for feedback and improvements. This leads to faster development cycles, more innovative products and more competitive prices.

SugarCRM Services by Eupac

Eupac is an authorised SugarCRM UK Channel Partner. In addition to SugarCRM software, we provide a wide range of professional services for your SugarCRM implementation.

Whether you wish to purchase or upgrade your Sugar edition, or have already purchased SugarCRM but need assistance in your implementation and/or maximise returns on your investment- please contact Eupac for details.

Our UK-wide professional services include Implementation, Training, Integration, Customisation and Extended Support.

If you are still wondering whether a CRM package can really help your business/organisation, why not take advantage of Eupac's Professional Consultation Services. Our consultative approach is designed to provide you with an overview of your current system and procedures and allows us to highlight key areas that would be best served by the implementation of Sugar CRM.

With a fresh pair of eyes, let us help you take that decisive decision for the benefit your organisation - why not give us a call at 0207 471 8560?

“Our UK-wide professional services for SugarCRM include Implementation, Training, Integration, Customisation, and Support”

Eupac is a system integrator of communications technology. In addition to SugarCRM, we supply and implement VoiceSmart VoIP business phone system, a powerful business phone system with a wide array of Enterprise-grade features at affordable SMB prices.

To learn more about Eupac and our SugarCRM offerings, please visit our website at www.eupac.co.uk.

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Features may vary with different SugarCRM editions. Please contact Eupac advisors for any enquiries.