



Process Manager 5.0 for SugarCRM

Overview: SierraCRM's Process Manager 5.0 (PM5.0) is a powerful workflow engine that compliments SugarCRM's open source offering by extending the concept of a 'Customer for Life'. PM5.0 enables SugarCRM customers the capability to streamline and automate many of their daily tasks involved with customer acquisition and management. Process Manager's automated business workflow allows users to focus on selling and servicing customers in their most effective manner, utilizing their companies' best practices.

Product Specifics: PM5.0 allows users of SugarCRM 5.0 the capability to build easy-to-complex business processes that are triggered from events occurring within SugarCRM. For example, the automated sending of an email, on lead create. An example of a complex processes would be setting up a year long business process where the system sends an email to a contact or account monthly along with scheduling calls or tasks each month for follow-up communication to your customers. Tasks and calls are assigned to the owner of the object or assigned to any active user in the system. PM5.0 consists of three key components:

- **The Process**

The process defines the action and attributes that will fire or kick off the process. For example, processes can be setup to run on the creation of a lead or the modification of an Opportunity. You can go as far as creating a process to fire only when a specific field is changed to a specific value in one of the seven objects support in PM5.0.

- Leads
- Opportunities
- Contacts
- Accounts
- Cases
- Projects
- Bugs

- **The Process Stage**

The Process Stage relates to the Process via a many-to-one relationship. Thus, a process can have one or many stages. A stage contains the tasks to do. Process Stages are setup to run immediately or can be setup to be queued to run in the future. For example, you could create a process to send emails to a new lead on lead create. This would be Stage 1 with no delay. You could also add Stage 2 to kick off in one month with a series of tasks to do. Stage 2 would be setup to be delayed 1 month.

- **The Process Task**

The Process Task relates to the Process Stage via a many-to-one relationship. Thus, you can setup as many tasks for each Process Stage as you desire. Process Tasks are defined as one of the following:

- *Send an Email*: Emails are sent using Templates that you create in Sugar's Email Templates module. Emails are sent to the email address for the lead, contact of account. Additionally, you can choose to send the email to a specific type of contact. For instance, you may want to setup a template to send an email to the President of a Company, and another template to the Secretary of the same Company. Finally, emails can also be sent to specific email addresses that you enter when creating the Process Task.
- *Schedule a Call*: Calls can be auto created and related to the object with the due date being any time you desire from either the initial create date of the object, or the modification date of the object. Calls are assigned to the owner of the object or can be assigned to any user of SugarCRM. Escalation is included that allows you to escalate the call if the call is not closed by a specific time.
- *Create a SugarCRM Task*: Tasks can be automatically created and related to the object with the completion date being any time you desire from either the initial create date of the object, or the modification date of the object. Tasks are assigned to the owner of the object or can be assigned to any user of SugarCRM. Escalation is included that allows you to escalate the task if the call is not closed by a specific time.
- *Schedule a Meeting*: Meetings can be automatically created and the attendees will include the owner of the object that the meeting is being created against.
- *Run Custom PHP Scripts*: You can create a Process Task that calls a PHP script. Process Manager passes the record and type to the script.

About the Company:

SierraCRM, Inc was formed in June of 2004 to deliver innovative and powerful enhancements for SugarCRM. Founded by experts in both AmdocsCRM and SugarCRM, SierraCRM's value proposition is to deliver products that automate many of the daily tasks associated with acquiring, processing, and marketing to prospects or customers. SierraCRM products include the award winning Process Manager, Marketing Manager and Routing Manager.

To contact the company, please call SierraCRM's Sales Office at: 530-272-3064; or visit the company website: www.sierracrm.com