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CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

Customer Relationship Management or, as it is more commonly referred to, CRM is a term that defines platforms and strategies that are used by organizations to better analyze and interpret interactions with customers during the customer journey. A CRM helps consolidate data and provides valuable insights that are otherwise difficult to discern within the abundance of data that is available to organizations.

A CRM system comes with a number of different functionalities but in its most nascent form, it collects and stores data to give sales, marketing and support the necessary tools to improve customer satisfaction, amplify customer retention and increase sales. A CRM monitors all contact points that a client has with an organization, including website visits, live chats, direct mail, and social media; an incredibly useful function when it comes to understanding your customer. A sales rep can quickly log into a CRM to see past interactions with a particular client, obtain detailed personal information as well as insights into their purchase history and preferences.

This SugarCRM Guide brings together everything you need to know about SugarCRM. With it, you can begin with a retrospective view of Customer Relationship Management and its many facets before embarking on a journey into SugarCRM. Learn why SugarCRM is the perfect CRM platform for your needs and find out everything you need to know about SugarCRM customization and integrations. Observe how you can customize the Sugar platform to maximize your business potential or simply look at the various Industry Solutions to hit the ground running!

CRM FUNDAMENTALS

A CRM, at its core, has always been about data consolidation revolving around customer information. All this data is poured into what's called a CRM database which serves as a store for the platform that lets organizations and businesses run their processes more effectively and efficiently.

However, we're in the 21st century now and CRM software has evolved. Today, a CRM comes with a range of different features that exponentially increase its functionalities. Features such as [marketing automation](#) and workflow automation are now a mainstay in CRMs and they serve to increase productivity and performance. Let's take a look at some of the mainstay features that are included in most CRM software product:



Marketing Automation

There are a number of tasks in the customer lifecycle that can be categorized as run-of-the-mill. These are repetitive and dull, and dedicating a resource to these is redundant, which is why a key appeal of CRM software is that it allows these tasks to be automated. Let's say you have a lead in the first stage of the pipeline, a CRM will automatically send him the necessary emails, follow-ups, and marketing materials to turn him into a customer. Marketing automation has evolved to a level where a CRM can automatically direct a lead through most of the pipeline processes and thereby increase the overall productivity of the organization.

Sales force Automation

[Salesforce automation](#) allows you to track your customer interactions and automate processes in the sales cycle that contribute to an increase in leads and new customers.

Customer Support Automation

Many call centers use a CRM to automate certain tedious tasks, these usually include pre-recorded audios that can assist customers with various issues and problems. Similarly, various CRM integrations can be used to manage customer requests to increase response time and simplify the management process.

Geolocation technology, or location-based services

Amplify your contact management and networking capabilities with the help of CRM systems and geolocation technology. Create marketing campaigns and use geo-technology for targeted marketing and identifying potential sales prospects.

Social CRM

Make an established presence on social media platforms and identify potential communication, marketing, and networking avenues. [Social CRM](#) presents a direct connection with your potential and existing customers. A business can track conversations about itself to identify issues and consequently, it becomes significantly easier for customer feedback to reach the company.

Workflow automation

A CRM system allows businesses to focus on high priority tasks by taking care of redundant, repetitive, and mundane processes and workloads.

Lead management

A CRM can track a lead through the sales cycle, and the Sales team can aptly input and analyze all corresponding data from within the CRM to make the process much easier.



Human resource management

CRMs can track and record employee information such as contact information, performance, incentives, and much more. With a CRM in place, multinational corporations and mid-level businesses alike can make their HR processes effective and manage them seamlessly.

Analytics

Dig deeper into how your processes impact customer behavior and increase customer satisfaction rates. With Analytics in CRM, you can analyze data and create targeted marketing campaigns based on the customer insights you discern.

AI in CRM

[Artificial Intelligence Technology in CRM](#) helps take the workload off of employees. Machine learning features and data analytics help automate mundane tasks and identify customer patterns that are otherwise difficult to analyze to make things much easier for employees.

HISTORY OF CRM

Customer interaction and retention has always been at the very core of any successful business. The most primitive CRM was when a salesperson filled out customer details on a card to keep records. The advent of the digital age merely brought this one-dimensional concept to digital mediums and scaled it for large multinational corporations. Since its inception in the early 1970's, CRMs have evolved through multiple milestones into a huge multi-billion-dollar industry that provides services ranging from customer retention and third-party integrations all the way to cloud-based infrastructures. From simply providing a medium that could consolidate customer data, CRM software has evolved to a point where CRMs are now capable of managing comprehensive business relationships. This has reached a point where it's entirely plausible to say that a [CRM can transform organizations](#). SugarCRM exists as the biggest open-source CRM platform, and Salesforce exists as the largest cloud-based CRM platform. These two collectively take up the biggest chunk of the global CRM market.

TYPES OF CRM TECHNOLOGY

The primary platforms for CRM are Salesforce, Sugar, SAP, and Microsoft. There are a host of other providers that primarily target small to medium-sized businesses. These four, however, are courted by most of the top multinational corporations. Think of these four as the big four Hollywood studios, they got all the big bucks! Each of these has a particular USP and offer the following in terms of CRM technology:

On-Premise CRM

On-Premise CRM is used to administer, control, maintain and safeguard the database of the company in question. Organizations opting for an on-premise CRM would purchase the CRM



upfront for a particular cost instead of opting for a yearly subscription model such as that of the Salesforce Cloud Platform. The on-premise CRM is implemented onto the company's servers and henceforth the user is responsible for all maintenance costs and upgrades. In comparison to a cloud-based CRM, this is a prolonged process and takes time to fully integrate. However, on-premise CRM is an excellent option for companies that need a complex CRM in place.

Cloud-Based CRM

[Cloud-Based CRM](#) is known by many names. If you ever come across something akin to a SaaS CRM or on-demand CRM, think of cloud-based CRM because that's exactly what they are. A Cloud-Based CRM exists on an external server in a remote location that can be accessed by the company at anytime, anywhere. Whereas an on-premise CRM exists within the organization physically and can only be accessed in the locality of that place. Cloud-based CRMs are perfect for companies looking for a quick deployment mechanism and limited resources. However, they come with their fair share of questions. Security is the foremost concern for most companies looking for a cloud-based CRM due to the external nature of its deployment. Look at it this way, in order to hack into an on-premise CRM, one would have to enter the designated location and then try to get in. On the other hand, to hack a cloud-based CRM, all you need is a stable internet connection and IP. To add to that, there's also the threat of the provider getting acquired or running out of business, leaving the client's data compromised.

TYPES OF CRM

There are two particular types of CRM software, open-source and proprietary.

Open Source CRM

[Open source](#) allows the client to directly access and customize the source code. For open-source CRM software, there are multiple established communities that consistently contribute to the software, thereby allowing more room for development, features, and customization. The burden of managing and updating the code lies with the community of developers and thus the CRM vendor in question has a plethora of resources to fill in the gaps left behind. An open-source CRM needs a dedicated [developer community](#) to function at its best. Perhaps the biggest benefit of an open-source CRM is its ability to integrate with a multitude of different CRM platforms, third-party apps, and tools.

Proprietary CRM

When it comes to proprietary CRM, the vendor holds all the cards. If an organization buys a proprietary CRM from a vendor, they have to rely on the vendor for all future updates, customizations and modifications. Proprietary CRM platforms also come with a multitude of customizations and modifications since vendors often modify CRMs for different industries, these are called [CRM Industry Solutions](#) that have [customized modules](#), dashlets and reports.



Another drawback of proprietary CRM is that vendors might withhold updates and release them collectively in a new version, forcing consumers to pay a steep price for them. However, when it comes to support, proprietary CRM overshadows open-source CRM. This is primarily because the CRM vendor itself takes full responsibility for all support tasks and needs and thus, inadvertently ensures that all business requirements are met effectively and timely. Proprietary CRM, however, puts certain restraints when it comes to integration with third-party apps. Now that you have a comprehensive view of what a CRM is, does, and how it works, read on as we dive deep into the world of SugarCRM, beginning with where it all started.

HISTORY OF SUGARCRM

Founded in 2004 by John Roberts and Jacob Taylor, SugarCRM has quickly turned into a market leader in the CRM industry. Providing an open-source CRM, Sugar quickly became the talk of the town and success soon followed. In less than 4 years, Sugar was housing more than 150 people under its wing and was providing [CRM services](#) to a number of large multinational firms. There's been numerous ups and downs (you can read about that in our SugarCRM Infographic), but Sugar has managed to pull through. Today, Sugar sits as one of the largest CRM vendors in the world with support for over 25 languages and a dedicated resource. in [Sugar University](#) for all end-users and administrators. SugarCRM sells CRM in three distinct editions (4 editions until 2017, the Sugar Community edition was discontinued in 2018.) Apart from this, you can also build your own SugarCRM as per your needs!

SUGARCRM EDITIONS

Organizations can opt for one of the following [SugarCRM Licenses](#)

- Sugar Professional
- Sugar Enterprise
- Sugar Ultimate
- Sugar Community Edition (discontinued)

Sugar Professional

- Sales automation and forecasting functionalities
- Automated Support
- Marketing Management (Lead Nurturing, Lead Management)
- [SugarCRM Reporting](#) Features.
- Dashboards
- Call Center Automation
- [SugarCRM mobile](#)
- 15 GB Storage
- Deployment (On-Premise or Cloud)
- Unlimited Studio Customizations
- Support for MySQL and SQL Server-On Site



- Unlimited Online Support

Sugar Enterprise

- All Features from Sugar Professional
- Revenue line-item level opportunity tracking forecasting
- Product level quotes
- Advanced Workflow
- Role-Based Views

SQL –Based Reporting AccessSugarCRM

-
- Support for Oracle and DB2-On Site
- 60 GB Storage

Sugar Ultimate

- Round the clock support
- Dedicated Technical Resource
- 250 GB Storage
- Up to 5 sandbox instances (on demand)

Sugar Community Edition

Sugar Community Edition has now been discontinued. SugarCRM Community Edition was an open-source version of SugarCRM. Follow the link for a comprehensive description of the [Sugar Community Edition and what to do next!](#)

Sugar Hint

The hint is SugarCRM's foray into relationship intelligence that brings external information on contacts and leads inside Sugar. With [Sugar Hint](#), all you need to do is put in a contact's name and email addresses to fetch relevant and useful information such as social media links, contact information, background details, job history and past interactions to the forefront. Sugar Hint is an excellent support tool to provide valuable context and insights about your contact or lead to ensure they receive a more personalized experience that improves your customer interactions and support.

Sugar Hint has 3 distinct features:

- Enhanced Intelligence Pane: Find all relevant data at the click of a button.
- AutoFill Records: Automatically update data after Sugar fetches it for you.
- Activity History: Find details on all past interactions in chronological order.



SUGARCRM PRICING

SugarCRM uses a per user [pricing model](#) in the three different variants mentioned above. All three are designed differently to cater to unique business requirements and needs. We've broken down the pricing and features below:

Sugar Professional	Sugar Enterprise	Sugar Ultimate
Ideal for growing your small business	Best value for larger businesses	Most complete CRM plus highest level of support
\$40 €40 £32	\$65 €65 £52	\$150 €150 £120
Per user per month billed annually*	Per user per month billed annually*	Per user per month billed annually*
Includes: <ul style="list-style-type: none">Sales automation and forecastingCustomer service + case managementLead management + sales campaignsOnline support15GB storage	Includes all features in Professional Edition plus: <ul style="list-style-type: none">Product level quotes and forecastingAdvanced workflowRole-based views and permissions100 concurrent customer self-service portal users12x5 (hours/days) email and phone support60GB storage	Includes all features in Enterprise Edition plus: <ul style="list-style-type: none">Assigned Technical Account Manager5 sandbox instances24x7 support250GB storage
Download product brief Buy now >	Download product brief Buy now >	Download product brief Buy now >

Sugar Professional provides a host of affordable SugarCRM features to satisfy all the needs of your small or medium sized business. Further SugarCRM Integrations can be added at a small price to ensure you have everything you need at an affordable rate. Sugar Professional is the most basic edition of SugarCRM and a good investment for SMBs.

Sugar Enterprise includes all features of Sugar Professional along with advanced workflows and 60 GB of storage space. Sugar Enterprise comes with a plethora of advanced features such as revenue tracking, forecasting, integrated 12-hour email and phone support and certain Sugar Mobile features like Studio Editor and Sugar Logic. Sugar Enterprise can prove to be a game changer for your organization, provided that the features can be leveraged the right way. It is an excellent package for reducing processing times and overhead costs.

Sugar Ultimate stays true to its name as the ultimate solution for all your Sugar needs. Sugar Ultimate comes with unlimited functionalities and is an excellent investment for large multinational corporations. Sugar Ultimate comes with round-the-clock technical support throughout the week along with a dedicated technical account manager, 250 GB of storage space as well as 5 sandbox instances. It is optimal, adaptable and allows seamless integration. It's safe to say Sugar Ultimate provides features of a colossal nature that can solve all your CRM needs in one go! A steep price but the benefits far outweigh the cost.



Sugar Hint provides all customer contact information and relevant data using name and email. This data can be imported into Sugar with a click of a button. For out of the box Sugar solutions, you can use a simple formula to calculate costs:

$$\begin{aligned} \text{No. of users} \times \text{standard price} &: \text{Total Cost} \\ \text{No. of users} \times \text{Hourly rate} &: \text{Total Cost} \end{aligned}$$

SUGARCRM PORTAL

The Sugar Portal is a platform for customers to find and log information about their instances. It is where all the cases, bugs, and Knowledge Base records go. The Portal can be accessed with login credentials by a Sugar user and can be configured to suit your business needs. The Sugar Portal can be customized through the Configure Portal too, but it comes with limited flexibility. To have the Sugar Portal customized according to your needs, you can contact us, and we can provide a solution that will fit perfectly with your business needs.

SUGARCRM MOBILE

[Sugar Mobile](#) helps you increase your productivity and manage all your business processes and needs on the go. Sugar Mobile helps you maintain productivity with its “with or without” connectivity feature that backs up all your interactions and additions offline and logs them in once your phone is connected. Sugar Mobile comes free of charge with the purchase of one of the Sugar Editions. It works perfectly fine with phones and tablets with a simple setup that keeps you connected to your Sugar no matter where you go. With Sugar Mobile, you can:

- Market leading offline sync capabilities
- Multiple Device Integrations
- Dynamic features to easily manage sales, marketing, and support activities.

SUGARCRM CUSTOMIZATION

It goes without saying that any good CRM should adapt to you and not the other way around. If your organization has to change its business processes to adopt a CRM, there's something terribly wrong. Millions of businesses are currently using [SugarCRM](#) and all of them have different needs, demands, and requirements. Sugar, in its default state, cannot be leveraged to its maximum since it includes only the most basic features and functionalities. To bring Sugar to its maximum potential, it needs to be customized according to the particular needs of your business. Businesses with an eye for foreshadowing have implemented [SugarCRM customization](#) to enjoy higher productivity, growth, and profitability. The world is changing at a rapid pace and as technology evolves, so should your business. SugarCRM. With its extensive customization capabilities, is excellent for scalable business development.



Module Customization

By default, Sugar has several modules i.e., Accounts, Leads, and Contacts. However, these are not satisfactory as businesses have evolved past that. These days, organizations look for several customized modules for their business processes. [MPower Energy](#) was one such client that required a [Case Module Customization](#). This functionality enabled MPower Energy to categorize their cases into 7 different categories automatically. Another example of module customization could be [Payment Module Customization](#) where the payment module can be customized to show multiple currencies. Similarly, Email Customization is another such instance where you can customize the module to automatically turn inquiring prospects into leads, archive email and lots more. The possibilities for customizations are endless and this reinforces that all businesses do not have identical needs and require custom built modules for better functionality. Sugar, thanks to its open-source nature, allows custom modules but developing one with back-end programming demands the need for a certified SugarCRM development firm.

Dashboard Customization

The dashboard is the homepage of the Sugar interface, think of it as the timeline that shows up the moment you log in to Facebook. The default [dashboard in SugarCRM](#) may or may not cover all aspects of your activities and required actions. The dashboard needs to be customized according to the specific workflow of the user to keep them informed and updated on the status of their work. The dashboard for someone on the support team should include scheduled calls, tickets in the queue, etc. Whereas a dashboard for someone on the executive level should show an overview of various departments in the organization. In the recent past, Sugar itself has recognized the need for customized dashboards and released its very own [Product Catalog](#) Dashlet for seamless navigation. You can get all kinds of customized dashboards with the help of [Certified SugarCRM Developers](#).

Fields and Filter Customization

Field customization has become a mainstay in SugarCRM, and most customers want them implemented. [Custom Fields](#) provide room for storing additional information about records within modules. They can also be customized to automatically fill on selecting a record. Custom fields in SugarCRM can be a lot of help as they let your autofill, auto-populate, and autocorrect information. Filters in SugarCRM allow you to see the data you need. Just like any all-purpose filter, the ones in SugarCRM let you scrutinize the data you want to see.

However, the types of filters existing in Sugar by default are not satisfactory for certain business requirements. To configure the fields to suit business needs, organizations opt for certain custom fields to increase the productivity of their resources and operations.

Workflow Customization

Workflows are a set of repetitive processes that are automated to improve business operations. Sugar provides some workflows that can be set in place once, but for organizations with diverse processes, this can get messy quickly. Sugar tried to simplify its workflows by introducing its robust Advanced Workflow Module, complete with a drag and drop interface that gives you a



360-degree view of the entire process. However, if you're a large enterprise, you wouldn't want to find yourself in any [Advanced Workflow Pitfalls](#) due to the intricacy of the workflows being implemented. To counteract this, you can use custom workflows. These workflows can help automate several processes as desired and bring clarity to operations.

Sugar Theme Customization

Branding goes a long way in establishing a company's presence in the market. Some organizations might even have clear instructions on the aspects of branding currently in place. It only makes sense that they'd want their Sugar to fit in with their image so that it looks attractive and visually appealing. This can result in improved user adoption and make your employees feel more in place. You can judge a great theme by how it highlights a brand's identity and amplifies the industry your business corresponds to. One of the major reasons for Sugar's popularity across the globe is the heightened degree of customization it provides. You can have each and every aspect of your [SugarCRM Themes](#) modified in a way that brings out the best of what your business has to offer.

Whether it's your login page, dashboards, list view, detail view, record view or anything else, you can get anything and everything customized in SugarCRM.

SugarCRM Reports Customization

Reports in SugarCRM are one of the major cornerstones of business analysis and interpretation. Reports are used to analyze performance, track records, conduct audits and so much more. SugarCRM stores a wealth of information that can be leveraged through insightful reports. Sugar itself offers a multitude of reports that are capable of handling a majority of business processes, but certain unique businesses have requirements that go beyond the scale of these reports. That is when they opt for custom reports; custom reports are made by extending the functionality of the reporting module in Sugar to widen the net and leverage data from the desired mediums.

There are a number of other customizations that can be carried out in SugarCRM i.e.

- Custom roles and privileges
- Third Party Software Integration
- Email Customization
- Calendar Customization
- Data Security Customization

SUGARCRM INTEGRATIONS

With the world evolving at a robust speed, it is counterproductive for you to be switching between multiple platforms for different tasks. You want all your important processes and needs consolidated in one place, and that's where a SugarCRM proves its worth in gold. With its open-



source nature, SugarCRM can readily integrate with any third-party platform that you require for your business, and you can then manage all your operations from within SugarCRM. This is where Sugar really shines with its open architecture, using which virtually any software can be integrated with it.

Why Integrate with Sugar?

By integrating your [third-party apps with SugarCRM](#), you can amplify its capabilities and get a full 360-degree view of your business processes. Let's take a closer look:

- **Increased Functionality:** Your team gets advanced features that don't come out of the box with Sugar e.g., making calls from Sugar, sending documents for e-signature inside Sugar, etc.
- **More Productivity:** By consolidating your processes on one platform, you can maximize your productivity.
- **Data Sharing:** You can consolidate your data for meaningful analysis and insights.
- **A Full 360 Degree View:** With data from multiple channels in sync, you can better analyze your business and make decisions which are accurate and based on factual information.

SugarCRM Integrations with Accounting Apps

You can integrate your Sugar with numerous accounting apps including the top of the line applications such as Quickbooks and Xero. With this integration, your Sugar can bi-directionally synchronize with these apps and automatically update information on both ends in real time. Through this simple integration, you can manage all your accounting needs from within Sugar. Some of the integrations we have done in this area include:

- [SugarCRM Integrations with Quickbooks](#)
- [SugarCRM Integrations with Xero](#)
- SugarCRM Integrations with Sage
- SugarCRM Integrations with Authorize.Net Certified SugarCRM Developers.

SugarCRM Integrations with Payment Gateways

Timely payments are at the heart of every successful business. But things can get quite tricky and slow if you've got multiple online channels handling your payments, and the worst part is that there's really no other option given the increasing popularity of e-commerce. Well, to help simplify your payment handling processes, you can integrate your payment gateways with Sugar and manage all your payments from one place.



- [SugarCRM Integrations with Shopify](#)
- [SugarCRM Integrations with Stripe](#)
- Sugar CRM Integration with SecurePay
- [SugarCRM Integration with PayPal](#)

SugarCRM Integrations with Telephony systems

One of the most essential CRM functions is to record client interactions and maintain a single database for future reference. This database can be accessed to make informed decisions and track all your inbound and outbound calls from within your Sugar. You can achieve all of the above with a simple click-to-call feature in your Sugar with integrations such as:

- SugarCRM Integration with Audion
- SugarCRM Integration with RingCentral
- SugarCRM Integration with Interactive
- SugarCRM Integration with TrueCaller
- SugarCRM Integration with CallSource
- SugarCRM Integration with Skype
- SugarCRM Integration with Act-on
- [SugarCRM Integration Etrique](#)
- SugarCRM Integration Net-Effect
- [SugarCRM Integration with Mautic](#)
- [SugarCRM Integration MailChimp](#)
- [SugarCRM Integration with Inbox25](#)

Integration with Marketing Automation Platforms

CRMs are undoubtedly the most innovative technology when it comes to Sales, but the same can seldom be said when it comes to Marketing due to their substandard approach towards delivering qualified leads. However, this is where Marketing Automation comes in handy. With its personalized, stage-appropriate nurturing approach, integrating your Sugar with a Marketing Automation platform is literally all you need to get those leads flowing. [Managing marketing campaigns](#) in SugarCRM is a breeze and that is why Rolustech provides Sugar integrations with several [Marketing Automation](#) tools.

Social Media Integrations with SugarCRM

Social Media is a mainstay of any sales strategy because it gives your sales team an in-depth look at what does and doesn't work for your customer base. Rolustech SugarCRM developers have integrated Sugar with the following Social Media platforms:

- Facebook
- Twitter
- LinkedIn



SugarCRM Integration with E-Signature Apps

Choosing a document from Sugar and sending it to a customer to get signed from a different application window is highly unproductive. Sugar can easily integrate with numerous e-signature platforms that bring the e-signature functionality inside Sugar. Some e-signature platforms which we have integrated with Sugar include:

- [SugarCRM Integrations with DocuSign](#)
- SugarCRM Integrations with Adobe Sign
- SugarCRM Integrations with E-Signature Apps

SugarCRM Integrations with Google Apps

If you use Gmail and related Google apps, it is essential to use an integration that syncs data between both platforms so you can access all of the updated information pertaining to your business processes in a single place. [SugarCRM Integration with Google](#) can take the following forms:

- [SugarCRM Integrations with Gmail](#)
- SugarCRM Integrations with Google Contact
- [SugarCRM Integrations with Google Calendar](#)
- [SugarCRM Integrations with Google Drive](#)
- [SugarCRM Integrations with Google Map](#)

SugarCRM Integrations with Content Management Applications

- [SugarCRM Integrations with Box](#)
- SugarCRM Integrations with Rackspace
- SugarCRM Integrations with Alfresco

SugarCRM Integrations with Email Clients

Email clients help businesses manage client correspondence in an efficient and timely manner. By integrating your Sugar with an email client, you can record all email communications inside the CRM. This allows CRM users easy access to find all relevant information. We have integrated Sugar with:

- Gmail
- RIVA
- MS Outlook

SugarCRM Integration with Ecommerce Platforms

Running an e-commerce business without a robust CRM working on the back end is difficult. With a CRM in place, you can record sales, transactions, provide post-sales service and manage finances. The e-commerce platforms that we have integrated with Sugar include:



- [SugarCRM Integration with Opencart](#)
- SugarCRM Integration with VirtueMart
- SugarCRM Integration with Woocommerce
- [SugarCRM Integration with Magento](#)

SugarCRM Integration with CMS

Most companies prefer their own client support solutions, and this is where a Sugar integration with a CMS comes in handy. You can have all the information you need in one place with this integration. Moreover, this way customer support representatives also have access to a complete profile of the clients who contact them. Some of these solutions integrated with Sugar include:

- [SugarCRM Integration with WordPress](#)
- [SugarCRM Integration with Joomla](#)

Data Analytics integrations with Sugar

Each day more than 2.5 quintillion bytes of data is being created, which is why smart businesses are increasingly shifting their focus on the useful insights hidden in the heaps of data. Using an integration with your SugarCRM, the data can prove to be extremely useful. We have integrated Sugar with:

- FluidSurveys integrations with Sugar
- Google Developer Charts integrations with Sugar
- Informatica integrations with Sugar

SUGARCRM PLUGINS

SugarCRM Plugins are the way to go if complex customizations and grueling integrations are not your cup of tea. Plugins are general plug and play solutions that you can incorporate into your CRM without having to go through the additional steps of defining requirements and then having a solution developed from scratch, which is the case with customizations and integrations. Sugar Plugins have grown in versatility and utility over the years, and some have even cemented themselves as almost necessary for normal business processes. The [Xero-SugarCRM Plugin](#) is one such utility that is necessary for businesses small and large alike. It syncs accounting data with your Sugar and gives you a consolidated view of customer details inside SugarCRM. It serves as an excellent alternative to customizations and integrations if you're looking for a quick and easy fix. The SugarCRM Plugin library is immense, and you'll find yourself spoiled for choice when you're looking for a plugin to add any given functionality within



Sugar. Check out all the industry standard plugins developed by Rolustech below or take a look at some of the [top-rated SugarCRM Plugins](#).

RT GSync

[RT GSync](#) is a Sugar plugin that integrates SugarCRM with a plethora of Google Apps and provides bidirectional syncing of all Google Data with SugarCRM. RT GSync pours in data from Emails, Calendars, Documents, and Contacts. RT GSync allows you to:

- Automatically archive emails.
- Sync all extensions between SugarCRM and Google
- Sync all meetings, tasks, calls, and appointments.

RT SalesMap

Give your records a visual makeover with [RT SalesMap](#). This Sugar plugin leverages the power of Google Maps to give you an overview of all your accounts, leads, and contacts from a geographical standpoint. With RT SalesMap, you can:

- Make use of Google Maps and make the most of its navigation features.
- Use Radial Search to single out priority Accounts, Leads and Contacts
- Identify geocoded addresses from non-geocoded addresses in SugarCRM records.

RT Telephony

An integration of Twilio with SugarCRM, [RT Telephony](#) enables voice and SMS functionalities to make for more efficient and productive client communications. With RT Telephony, you can:

- Make use of advanced telephony functionalities inside Sugar with a simple [click to call](#) feature
- Create customized voice responses.
- Keep track of call records and record calls
- Schedule SMS campaigns
- Schedule calls and organize schedules to maintain agent availability.

RT SugarBox

An integration of Box.com with SugarCRM. [RT SugarBox](#) lets you manage all the virtual paperwork involved in your business operations with a bi-directional syncing mechanism, mapping of modules, and real-time updates. With the help of RT SugarBox, you can wave your business problems goodbye. Leverage its functionalities to:

- Get real-time revised and updated documents in one place.
- Get documents signed from within SugarCRM.
- Find content status updates inside Sugar's activity stream.
- Store and share PDFs within [Sugar with Box](#)
- Upload documents from within Sugar



RT DocuSign

[RT DocuSign](#) adds a whole new level of finesse to business dealings and customer acquisition. Send documents from within Sugar and have them digitally signed by customers on any browser or device within seconds. With RT DocuSign, you can:

- Send PDF files to entities involved in your business through the Accounts, Contacts, Leads, and Opportunities modules.
- View document status updates inside SugarCRM
- Define access levels for documents to increase security and privacy.

RT QuickBooks

[RT QuickBooks](#) is another accounting integration for SugarCRM, much like Xero. It lets you access the core functionalities of the popular accounting software, QuickBooks to generate invoices, inventory, and sales reports from your SugarCRM. With RT Quickbooks you can quickly:

- Sync customers, quotes, invoices, and inventory from Quickbooks with the Sugar Accounts, Quotes, and Items modules.
- Sync a record to Quickbooks from within SugarCRM
- Track sync history
- Define priority roles and assignees for synchronized records.

RT SugarXero

Integrate SugarCRM with Xero with [RT SugarXero](#). Similar to Quickbooks, it gives you complete control over your financial data from within Sugar. You can view invoices, purchase history, customer lifetime value and:

- Sync Xero Contacts with SugarCRM Contacts
- Create and Manage invoices.
- Trigger workflows from sales history
- Identify consistent customers based on purchase history and employ targeted marketing techniques.
- Combine SugarCRM data with Xero data in reports.

RT CXM

Integrate SugarCRM with WordPress with [RT CXM](#). It monitors your website in real time and pours all the data into Sugar allowing you to analyze and comprehend visitors in real time.

Through RT CXM, you can:

- Extract valuable customer information.
- Automate lead creation and obtain user data.
- Identify your lead's social data and interests through the email submitted on your website.
- Track customers' lifetimes



RT HRM

[RT HRM](#) is a SugarCRM plugin that simplifies and manages all human resource responsibilities and processes. With RT HRM, you can monitor recruitment management, evaluations and employee reporting. Leverage the power of RT HRM to:

- Monitor job postings, openings, applications and shortlist of candidates.
- Manage payrolls and attendance.
- Monitor employee performance, progress and evaluations.
- Create performance reports.
- Create pay slips.

RT Personalize

[RT Personalize](#) adds a touch of personality to your Sugar. This plugin provides users with the ability to choose personalized typography and themes for their CRM interface and is available with all Sugar versions. You can also get SugarCRM custom login screens and more.

RT StikiNotes

[RT StikiNotes](#) is a FREE utility Sugar plugin that lets you bring those good old sticky notes inside Sugar. These StikiNotes can be linked with any record and can also be used to put reminders and priority tasks in order, just like regular sticky notes, but only better.

SUGARCRM INDUSTRY SOLUTIONS

Industry Solutions are customized CRM software products that are custom-built for various industry verticals. Rolustech has created several Sugar industry solutions that come with all the necessary functionalities, modules, and workflows designed to fit the needs of the industry vertical they are designed to cater to. These solutions serve as excellent alternatives to CRM customizations and integrations due to their ready availability. For instance, if you're a health care organization, it would make more sense for you to go for a [Health Care Industry Solution](#) CRM than get a CRM and spend additional time and resources customizing it to fit your needs. These ready-made solutions containing multiple necessary integrations right out-of-the-box with custom dashboards and reports make for a great option for any business whose operations do not vary too much from what the standard operating procedures within their industry are.

Let's breakdown the industry solutions developed by Rolustech.

Financial Services CRM

The [Financial Services CRM](#) builds upon [key financial CRM features](#) to develop a cloud-based platform that is enriched with all necessary functionalities to enhance the productivity of financial service firms. The Financial Services CRM allows firms to leverage these functionalities to gain a holistic view of clients and have access to all the right information. This industry solution



comes with dedicated custom modules for Investors and Prospects as well as detailed dashboards to give investors a complete overview of their investments. Reports are also a mainstay feature in this industry solution, providing clients with the most relevant insights to manage and track their investments. To cap it all off, it also includes email marketing functionality so you can manage all aspects of your business from a single source.

HealthCare Services CRM

[HealthCare Services CRM](#) is a transformative foray into optimizing the operations of a healthcare firm. Our certified SugarCRM developers have worked hard to come up with a solution that caters to the needs of the healthcare industry across each specialized field within it. Building upon the potential CRM benefits for the healthcare industry, this solution pushes the barriers of innovation by introducing dedicated Doctors, Patients, and Staff modules along with a portal that is available to patients for them to track their appointments, medical history, and much more. Custom reports and dashboards complete this powerful industry solution to make it a viable tool to increase efficiency within the healthcare industry.

Real Estate Services CRM

The [Real Estate Services CRM](#) serves to revitalize innovation in the Real Estate industry by providing a custom CRM solution that hits all the right points. Real estate processes and deals largely revolve around the consolidation of all the entities involved in any given operation. This industry solution does just that by bringing agents, brokers, listings, buyers, and sellers on to one single platform to improve transparency and productivity. There are dedicated modules for buyers, sellers, offers, and commissions to track all aspects of a real-estate business's proceedings. It also comes with several SugarCRM integrations to give your agents all the necessary tools required to close a deal successfully.

Automotive Services CRM

The [Automotive Services CRM](#) puts all the different variables of your automotive business in order within a single system. With custom modules for dealers, buyers, customers, and deals, it is now easier than ever for you to manage your business and monitor all aspects of it from within your CRM. This Sugar industry solution also comes with dedicated inventory and case management functionalities that kick in to ensure your customers always have a support desk in their view that can cater to all their issues.

Gym CRM

The [Gym CRM](#) is your one-stop shop for all things related to your gym management. Custom modules and portals make up the surface of this industry solution that is tailor-made to optimize and streamline your gym management. From inventory and administration to trainers and employees, this [gym industry solution benefits](#) all aspects of your business.



Law CRM

Organize the hefty load of paperwork and client details involved in legal proceedings with this [Law Industry Solution](#). Monitor everyone from lawyers and consultants to paralegals and keep track of all cases, appointments, and court visits. This industry solution also comes with a dedicated Clients module that lets you keep a record of your clients and find everything you need to know about them. A dedicated Projects module contains everything about your cases right down to the very last detail to make sure you're always on top of things. That's not all either, integrations with billing management systems or document management tools come right out of the box to give you everything you could possibly need in one purchase.

Construction CRM

We, at Rolustech, understand very well how the limitless array of stakeholders in construction projects can hamper productivity and lead to financial liabilities. The need for an overarching mechanism to monitor, optimize, and organize these construction projects led us to create this [Construction CRM](#), an industry solution for all construction firms and companies. Much like how a CRM for manufacturing industries operates, this Sugar industry solution also provides a holistic view of all entities with dedicated modules and portals present at each step of the way to enhance efficiency and productivity. This construction CRM can help manage multi-million-dollar projects with ease, improve productivity and increase profits.

WHERE TO GET YOUR CRM?

Rolustech is an Official SugarCRM Certified Partner Firm with one of the largest teams of Certified SugarCRM developers in the world. Our expertise lies in SugarCRM Development, Implementation, Customization, Integration, Migration, and Support services.

With a team of exceptionally skilled and accomplished SugarCRM developers, we bring a flexible virtual team with over 10 years of exclusive experience in Sugar that entails successful completion of over 800 projects. Over the years, Rolustech has gained widespread recognition and respect in the Sugar community due to its competency and high level of technical mastery. Its characteristic proven agile approach allowed Rolustech to build integration solutions based on best practices and solid implementation methodologies that continue to deliver tangible results. Rolustech has developed several custom products on top of Sugar for different industry verticals along with numerous plugins and mobile apps.

A good CRM system should encompass all the processes involved in the customer life cycle. From initial consultation to customization, implementation, support & training, we take care of the complete project lifecycle and ensure that your business remains up to date with the latest trends and automation in the Sugar platform so that you get the maximum value out of your CRM. We are aware of the needs, problems, and aspirations of our clients and strive unrelentingly to provide high-quality Sugar products and services to forge long-term relationships with our clients.



Take a look at our credentials through the lens of our [Sugar customers](#) or see our capabilities for yourself with this breakdown based on industry verticals.

- [SugarCRM for Finance Industry](#)
- [SugarCRM for Healthcare](#)
- [SugarCRM for Real Estate](#)
- [SugarCRM for Law](#)
- [SugarCRM for Construction](#)
- SugarCRM for Retail Industry
- [SugarCRM for NonProfits](#)
- [SugarCRM for Health & Fitness Industry](#)
- SugarCRM for Manufacturing Industry
- [SugarCRM for Insurance Agencies](#)

Our teams work with all Versions & Editions of SugarCRM including Community, Professional, Corporate, Enterprise, and Ultimate. With our In-depth industry knowledge, profound customer experience, cutting-edge technology, and proven delivery methods, we provide the best-fit, most scalable, secure and integrable CRM solution that delivers tangible results. Get in touch now for a [FREE Business Analysis](#) session to kick off your Sugar adventures.

SUGARCRM SUPPORT

The need for support is a given when it comes to SugarCRM. The complexity of the software means you never know when you will find yourself up against the wall. [SugarCRM support](#) is thus, an absolute necessity and that is why Rolustech provides state-of-the-art SugarCRM Support to help you keep your customer management standards met at all times. Lack of sufficient support can have detrimental effects and, in some cases, even lead to CRM failure. Rolustech houses a Certified Team of SugarCRM Developers, technical architects, business analysts, support professionals, quality assurance engineers, and software engineers; with over 10 years of exclusive experience in SugarCRM and over 600 completed projects under its belt, Rolustech is your one-stop shop for all SugarCRM support walkthroughs. Rolustech provides 24/7 SugarCRM support for all SugarCRM versions and editions. With our extensive command over the SugarCRM platform, we're aware of all common issues and problems faced by Sugar users and consequently, design solutions accordingly so you don't have to look the other way. Rolustech takes things up a notch by providing users with all the analytics and metrics they need to improve the productivity of their Sales and Marketing teams. In a nutshell, think of Rolustech as your go-to for all things related to SugarCRM Support, including any additional development projects and end-user training.

Rolustech Support Services

- Email support
- Expert's consultancy and advice
- SugarCRM Training



- [SugarCRM Upgrades](#)
- Tailored analysis

SugarCRM Demo Services

Owing to their vast experience with SugarCRM, the experts at Rolustech can help familiarize you with the ins and outs of the SugarCRM ecosystem. Our guided walkthroughs will let you get the most out of your SugarCRM and enrich your overall experience. We can help you understand the basics of SugarCRM and assist you in setting up and managing our powerful [SugarCRM plugins](#). Our SugarCRM demo services are FREE. The demos we offer include:

- SugarCRM Live Action Demo Video
- SugarCRM Feature Demo
- SugarCRM Screencast Demo
- SugarCRM Audio Demo