

Services offered by Dubai Computer Services for SugarCRM



SugarCRM community edition features.

• <u>Introduction</u>

Welcome to Sugar Community Edition, a commercial open source Customer Relationship Management (CRM) application.

Getting Started

This guide assumes that you have the required resources to access the Sugar application and you are familiar with how to use them. Contact your system administrator for issues and concerns.

User Interface

The Sugar user interface consists of various modules designed to help you manage customer-related records such as contacts and accounts. Each module, representing a record type, groups the tools and functions needed to perform specific tasks. This enables you to work more efficiently.

• Home

When you log into Sugar, you will see your Home page. Tabs for other modules display alongside the Home tab. Other users do not have access to your Home page.

Leads

Leads are early contacts in the sales process. Use the Leads module to create, manage, and track sales leads or unqualified opportunities along with related activities, sales campaigns, and history.

Contacts

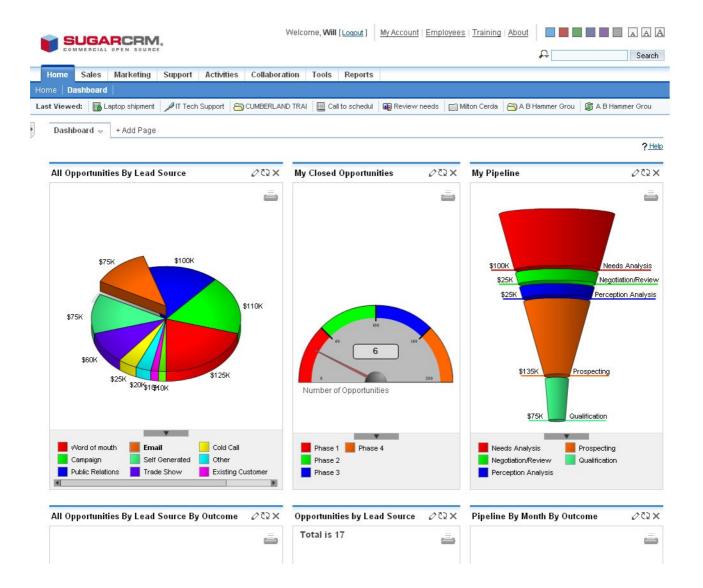
Use the Contacts module to create and manage contacts for your organization.

• Accounts

Use the Accounts module to create and manage customer Accounts for your organization.

Opportunities

Use the Opportunities module to create and manage sales opportunities, qualified leads, and view related records.



Documents

Use the Documents module to create and manage files that you share with users and contacts.

• Calendar

The Calendar Module has been introduced as a separate module in Release 6.2.0 to allow for ease of use and access. Use the Calendar module to schedule and manage activities such as calls, meetings, and tasks.

Calls

The Calls Module has been introduced as a separate module in Release 6.2.0 to allow for ease of use and access. Use the Calls module to log, view, and import calls.

Meetings

The Meetings Module has been introduced as a separate module in Release 6.2.0 to allow for ease of use and access. Use this module to schedule, view, and manage meetings.

• Emails

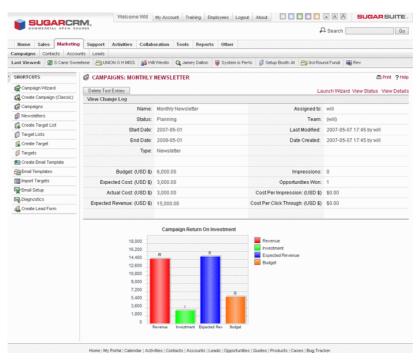
The Emails module enables individual users to send and receive emails from within Sugar.

Tasks

The Tasks Module has been introduced as a separate module in Release 6.2.0 to allow for ease of use and access. Use the this module to schedule and manage tasks.

Notes

The Notes Module has been introduced as a separate module in Release 6.2.0 to allow for ease of use and access. Use the this module to create, view, and import Notes and attachments to records in Sugar.



• <u>Targets</u>

Use the Targets Module to track and manage targets as part of mass marketing campaigns. You can create many types of campaigns as described in Creating a Campaign.

• Target Lists

Use the Target Lists Module to track and manage mass marketing campaigns. You can create many types of campaigns as described in Creating a Campaign.

• Campaigns

Use the Campaigns Module to track and manage mass marketing campaigns. You can create many types of campaigns as described in Creating a Campaign.

Cases

Use the Cases module to track and manage services-releated problems reported by your users and customers.

• Bugs

Use the Bug Tracker module to report, track, and manage product bugs.. Bugs are defects or features associated with a particular revision of a product. The administrator populates the drop-down list of product releases. After you create a bug, you can associate it with the related case.

• Projects

Use the Projects Module to create and manage projects for your organization.

• Export

You can export Sugar records in .csv format to your local machine. Use Microsoft Excel, Notepad, or other text editors to open .csv files.

• Import

Import data for modules such as Accounts, Contacts, Leads, Opportunities, Targets, Calls, Meetings, and Tasks with the help of an easy-to-use User Import Wizard. Refer to the tooltips and instructions provided in the wizard at every step of the import process.

Employees

Use the Employees module to view information such as name, title, and email address for employees in your organization.



Starter package:

Installation and setup: PKR 27,500 USD 275 AED 1,000 (One time)

Hosting: PKR 27,500 USD 275 AED 1,000 per year.

Database and application backups: PKR 1,400

USD 14 AED 50 per month.

Disaster recovery restoring of application and database: PKR 27,500 USD 275 AED 1,000 per restore.

Disaster recovery is payable by customer only if the customer messes up their CRM via their admin account.



In cases where the issue which leads to a restore is related to hosting related issues, then it shall not be charged to the customer.

Extra services:

Support : USD 82 PKR 8,200 AED 100 per hour. **Training :** USD 82 PKR 8,200 AED 100 per hour. **Development :** USD 70 PKR 7,000 AED 255 per hour.

Larger servers: Hosting rates depend on size of server and network required.

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