

Process Manager 4.0



Your Workflow Solution for Sugar

Automate the day to day tasks of selling to and servicing your customers with advanced workflow for Sugar.

- Engage your entire company in the sales and support of your customers. Alert your staff when high value customers need special attention based on service level agreements.
- Convert more of your new leads to paying customers by intelligently routing your leads to the correct employee or team that is best qualified to close the sale.
- Never lose another revenue opportunity. Notify sales managers and their teams when a sale is about to be lost because someone missed an important call or let a task drop through the cracks.
- Always provide exceptional customer sales, service and support by utilizing Sugar workflow.
- Easily transfer your Sugar legacy workflow to the new Process Manager 4.0.

Try Process Manager 4.0

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- **Advanced Timing Options:** The key to effective workflow is the ability to schedule an action or task based on a time or an event. Process Stages tell Process Manager when to do something. Each stage contains one or more Tasks. Stages can run immediately or be queued up to run at a later date which is the essence of Time Based Workflow.
- **Reports Console:** In addition to showing all objects that have had the process run against them, the Reports Console also shows all objects that are in the queue waiting to be run in the future. You can remove the object from the queue if you so choose.
- **Multiple Options for Process Actions and Tasks:** What you can do is quite extensive and limited only by your Imagination!

- ✦ **Advanced Email Functionality:**

Send emails to customers, partners, employees, teams, or fixed email addresses during the life cycle of your customer. Setup drip email campaigns to communicate with your customers throughout the year.

- ✦ **Never let a job fall through the cracks:**

Automatically assign tasks to your employees when key events occur during the sales or support cycle of you customer.

- ✦ **Update Related Records with data from Related Records:** Need to update fields on a related record with data from another related record? This is one of the many new features of Process Manager 4.0.

- ✦ **Automatically convert legacy workflow::** Easily transfer hundreds of Sugar legacy workflows to Processes in Process Manager using the legacy transfer tool.

- ✦ **Modify Fields:** Update fields in either the process object or related object. Update all fields in related objects. Update by copying fields from one object to another.

- ✦ **Create New Records:** New Sugar objects, such as Cases, Opportunities, or even custom modules can be created as a process task. Multiple options for setting field values include using templates, setting by field, or setting by value.

- ✦ **Run Custom PHP Scripts:** Run your own custom PHP scripts that can do anything you need to have done in Sugar.

- ✦ **Route Records:** Assign records to individuals or round robin to groups of users.

