Sierra CRM

Process Manager **4.0**

Your Workflow Solution for Sugar

Overview: SierraCRM's Process Manager 4.0 is a powerful workflow module that replaces Sugar's legacy workflow and allows your company to provide exceptional customer experiences. Companies using Process Manager have the   capability to streamline and automate many of their daily tasks involved with customer acquisition and follow on sales support. Process Manager's automated business workflow allows your employees to focus on selling and   servicing customers in their most effective manner, utilizing your companies' best practices.

Product Specifics: Process Manager provides companies the capability to build easy–to-complex business processes that are triggered from events occurring within Sugar. For example, the automated sending of an email on lead create, or the automated sending of an email to your customers birthday. An example of a complex process would be setting up a year long business process where Sugar sends an email to a contact or account monthly along with scheduling calls or tasks each month for follow-up communication to that customer. Additionally, you can setup business processes such as a 'Daily Birthday Campaign' in which every day at 6AM, Process Manager runs a query to find all contacts whose birthday is that day and sends them a happy birthday email. Process Manager consists of the following key components:

Process
The process defines the action and attributes that will fire or kick off the workflow. 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 any module in Sugar. Processes can be setup to run at recurring intervals in which you chose an hourly, daily, weekly, or monthly time to run a query against any module in Sugar and the result is passed to the Process Stage for processing.   Processes can be setup using filter fields in which you apply filter   attributes to the objects triggering the workflow. Processes can be setup with Cancel events such that if a process has run on an   object and there are Process Stages queued up to run in the future, then the cancel event can purge these stages from running if the object has been changed

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 a second Stage 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

Every Process Stage has one or many Process Tasks. 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. Process Manager offers many options for determining who gets the email. You can send the email to the default email address for a Contact, Lead or Account. If the email address resides on a custom field, Process Manager can send to that address. If the email address resides on a related object, Process Manager can retrieve that email address. You can send the email to the owner of the object or a fixed email address. Send emails to all the members of a Sugar Team or Role.

Create New Records: You can have Process Manager create any new object as a process task. For example, software companies who sell yearly software maintenance agreements can setup a process to run one year after the closure of an Opportunity in which a new Opportunity is created, inheriting the data from the parent Opportunity. When creating new objects you can have Process Manager set the fields of the new object statically or dynamically by copying data to the new object from the object that triggered the process.

Convert Leads: A common task in any CRM system is the migration of leads to Contacts, Accounts and Opportunities. Process Manager allows you to automate this task when leads are ready to be converted.

Integrate with Other Business Software: Process Manager supports the ability to make RestFul calls to your companies external business applications such as Accounting and ERP systems. These calls are via a RestFul interface using JSON.

Run Custom PHP Scripts: Process Manager supports the ability to call a custom PHP Script that you or your Sugar consultant creates. With this capability built into Process Manager, your ability to build business processes to automate the day to day operation of your company is endless.

Modify Related Records: Process Manager supports the ability to update fields in related records. For example, when you close a Case in Sugar you can have Process Manager find all related tasks for that Case and set the status of the task to Completed.

Modify a Field: Modify the field of the object that triggered the process.

Assigning Records: A Process Task can be set to assign the ownership of a record to a specific Sugar user, or round robin to a group of users.

About the Company:

SierraCRM, Inc was formed in June of 2004 to deliver innovative and powerful enhancements for Sugar. Founded by experts in both AmdocsCRM and Sugar, 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.