

### Sugar Professional Modules

Sales Management

Marketing Automation

Customer Support

Reporting and Dashboards

Collaboration

Tools and Administration

### New 4.5 Features

Personal Homepages

Support for Microsoft SQL Server

Internationalization

Enhanced Sales Forecasting

Sugar Studio Enhancements

Integrated Forums

Self-Service Portal

Data Quality Controls

Global and Saved Search

Inline Editing

New Themes

**SUGAR PROFESSIONAL™ 4.5** is the latest version of the world's most popular commercial open source Customer Relationship Management (CRM) application. It provides business users a single view of customer interactions across sales, marketing and service with in-depth reporting and collaboration tools. For IT managers, Sugar Professional provides a cost-effective solution that is easy to manage while offering flexible customization, integration and deployment options.

### A Single View of the Customer

Sugar Professional captures all customer interactions in a single repository and shares this information across the company. This single view of the customer allows your employees to better manage your most important relationships. Sugar Professional supports your company from the initial marketing offer, through the sales cycle and onto customer support to ensure new customers become repeat ones. Mobile employees can access SugarCRM® via a smart phone to ensure important customer information is available at all times.

### Easy-to-Use

Sugar Professional is built with the end user in mind. Upon entering the system, users will find that Sugar Professional is quick to learn, easy to control, and helpful in their daily jobs. In fact, customers have mentioned that it is more difficult to keep users off SugarCRM than to keep them on. Higher user adoption increases employee productivity, which drives better performance and greater executive insight into the business.

### Cost-Effective

SugarCRM allows you to significantly reduce your Total Cost of Ownership (TCO). On average, customers are reducing their costs by 50 to 70 percent by switching from proprietary vendors to SugarCRM. SugarCRM reduces TCO by:

- Reducing subscription costs by 70%
- Cutting customization costs by 80%
- Lowering integration costs by 40%
- Reducing user training costs by 50%

### Custom CRM

Built on open source technologies, Sugar Professional offers innovative ways to extend application capabilities to meet your unique requirements. A robust set of configuration options exist to tailor screens and navigation, and even to add new modules altogether—with no coding necessary. For extensive customization and integration requirements, Sugar Professional provides a complete framework and API set to enable application tailoring in an unrestricted and upgrade-safe manner. With Sugar Professional, your CRM system fits your business, not the other way around.

*"I don't think the business was really dead set on finding an open source system. It just so happened that SugarCRM was open source and was a superior product at a superior price."*

James Sullivan  
CRM Analyst, Avid Technology

## Deployment Options

Whether configured, customized, or with no modifications at all, you can exercise your option to deploy on the computing environment that best meets your security, standards compliance, and integration requirements. SugarCRM offers three deployment options for this purpose—as an online hosted service with Sugar On-Demand, on-site with the pre-configured Sugar Cube appliance, or on-site with Sugar Professional running on your own hardware.

## Open Integration

SugarCRM recognizes that integration with your other core systems is a key success factor in your deployment success. SOAP APIs allow you to easily connect Sugar Professional to your existing IT environment, or directly access the Sugar Professional database. You can also implement custom-

ized PHP integration code to further modify the application's Enterprise's behavior, and not be afraid of code overwrites during future upgrades.

## Advanced Reporting

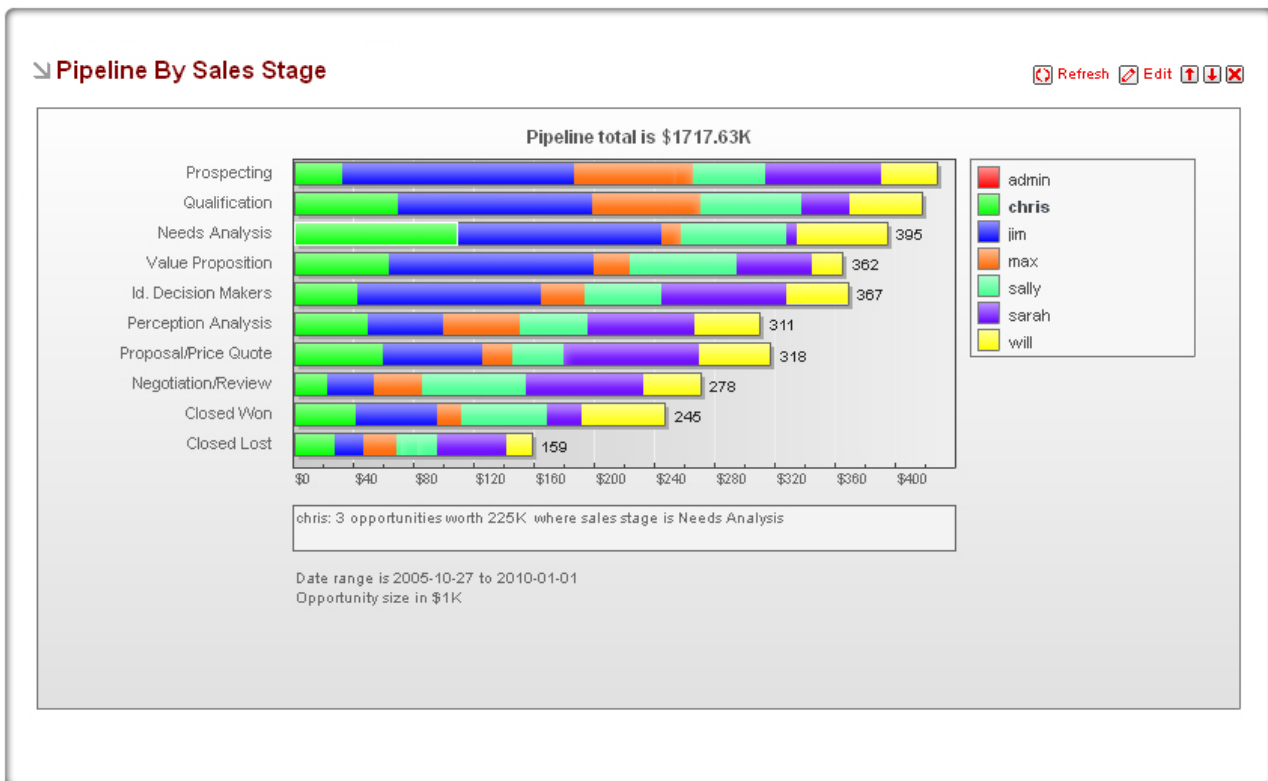
Sugar Professional generates a wealth of information for employees and executives. Managers can choose from standard reports across all Sugar Professional modules or design reports with a few simple clicks to reveal the exact information they need. Customizable dashboards provide a “cockpit” view of the most relevant information affecting the roles of employees and managers. This real-time information can be drilled down upon to reveal the underlying customer information.

## Cost-Effective Innovation

SugarCRM is consistently recognized for delivering easy-to-use, feature-rich applications at an attractive

price point. Sugar Professional 4.5 continues this legacy by offering new features, including:

- **Personal Homepages** allows users to drag-and-drop views to meet their needs.
- **Microsoft Support** for running Sugar on Microsoft SQL Servers and IIS.
- International Support provides support for Sugar in any language.
- **Enhanced Sales Forecasting** improves quota accuracy.
- **Sugar Studio Enhancements** deliver code-free customizations.
- **Integrated Forums** improve sharing of best practices.
- **Self-Service Portal** empowers customers while reducing support costs.
- **Data Quality Controls** improves information integrity.
- **Inline Editing and Global Search** saves users time and increases productivity.
- **New Themes** give users ownership and encourages broader use.



Sugar Professional contains pre-built and customizable dashboards to monitor important sales information, such as pipeline sales stages by team.

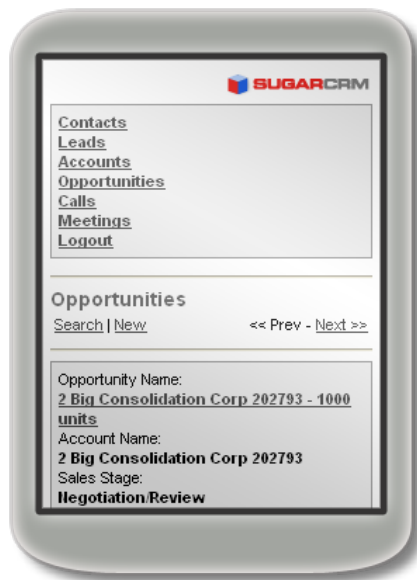
## FEATURE SUMMARY

### Sales Management

- Contact, opportunity, account and activity management
- Document library
- Notes and attachments
- Sales forecasting
- Team management
- Real-time reminders and alerts
- Product catalog
- Quote management
- Custom PDF quote
- Account team selling
- Opportunity team selling

### Marketing Automation

- HTML email templates
- HTML email tracking
- Online lead capture
- Lead management
- List management
- Email marketing
- Campaign management
- Subscription lists
- Suppression rules
- Group segmentation



Sugar Professional includes mobile support to allow employees to access important CRM data from a smart phone or PDA.

### Customer Support

- Self-Service Portal
- Case management
- Bug tracking
- Email management (email-to-case)
- Asset management
- Advanced case escalation and notification

### Reporting

- Dashboards
- Custom reports
- Cross-module reporting
- Charts in reports
- Customizable dashboards

### Collaboration

- Project management
- Activity management
- Integrated Forums
- Content syndication
- Document management
- Shared calendar
- Employee directory
- Team notices

### Mobile

- Microsoft Outlook and Office Editions
- Wireless edition
- PDA edition

### Platform Support

- Microsoft Windows®
- Linux®
- Mac OS®

### Customization

- Language Support
- 60+ Languages

- UTF-8 Support
- Multi-Byte Character Sets

### Customization

- Ajax Personalization
- Full source code access
- Unlimited # of custom fields
- Custom formula fields
- Unlimited # of custom objects
- Custom record types
- Drag-and-drop custom layouts
- Rename tabs
- Custom tabs and Web tabs
- Multiple page layouts
- Multiple custom page layouts
- Multi-lingual support
- Workflow automation rules
- Workflow automation tasks

### Migration

- Field and Record Merge
- Unlimited data import and exports
- Import/export utilities
- Import de-duplication

### Integration

- Fully SOAP enabled
- Web-services API
- Module loader
- Visible-source application

### Security

- Record-level security
- Multi-departmental administration
- Profile-based departmental security
- Access control
- Granular user permissions

*“Sugar, always known for its extensive customization features, adds an AJAX layer to version 4.5, blasting its customization features into the stratosphere. You can modify nearly everything on the fly.”*

PC Magazine

## SUGARCRM AND COMMERCIAL OPEN SOURCE

### About SugarCRM, Inc.

SugarCRM is the world's leading provider of commercial open source customer relationship management (CRM) software for companies of all sizes. SugarCRM's Sugar Suite easily adapts to any business environment by offering a more flexible, cost-effective alternative than proprietary applications. SugarCRM's open source architecture allows companies to more easily customize and integrate customer-facing business processes in order to build and maintain more profitable relationships. SugarCRM offers several deployment options, including on-demand, on-site and appliance-based solutions to suit customers' security, integration and configuration needs.

### Rethinking CRM

SugarCRM's commercial open source business model changes how software is developed, distributed and supported. Built upon open source technologies and supported by over 15,000 community members, SugarCRM is committed to delivering a cutting-edge CRM application at attractive price points to ensure the continued loyalty of our customers and community.

### Avoid Vendor Lock-In

When you buy Sugar Professional, you receive the product and the source code, so you can judge the effort and quality of the product.

**Flexible Delivery Model**



On-Demand      Appliance      On-Site

No constraints around deployment. You decide.

**Customizable User Interface & Workflow**



Sugar Suite adapts to the user. Not the other way around.

**Modular, Open Applications**



Use what you need to connect across your business.

**Open Source Architecture**



100% visible source code for inexpensive customization & support.

**Operating System Neutral**



Avoid 'forklift' upgrades and proprietary vendor lock-in.

Supporting all operating systems, Sugar Professional is modular, secure and scalable, and ships with source code for maximum flexibility.

There is no vendor lock-in because you have control over the product. It is a revolutionary approach called "open source" and it means you will spend less in the short- and long-term on your CRM system.

### The World's Largest QA Team

SugarCRM works in conjunction with a community of more than

15,000 members to provide the highest levels of functionality and quality. And with more than 800,000 SugarCRM open source downloads, no CRM product has had more real-world testing. This revolutionary approach to quality provides you with extremely stable, reliable CRM software with which to run your mission-critical functions.

Optimizing customer relationships and management of customer information is vital to success in today's competitive environment. At MIS we turn marketing information into marketing intelligence by providing real time access to your data. MIS specializes in database development, data integration and data management for direct marketers.



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