

Explore the power of Logic Builder for Sugar



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CRM Consultant

We make your work in CRM
more convenient and efficient



www.integroscrm.com

About Integros

Founded in November 2002
150+ CRM projects
70+ customers from 10 countries



- Business consulting
- CRM system implementation
- Ready-to-use Sugar Add-Ons
- Custom modules development
- Sugar performance tuning
- Sugar On-premise upgrade services
- CRM system support & maintenance

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Founded in November 2002
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"We save time, money and our workflows are always up-to-date."

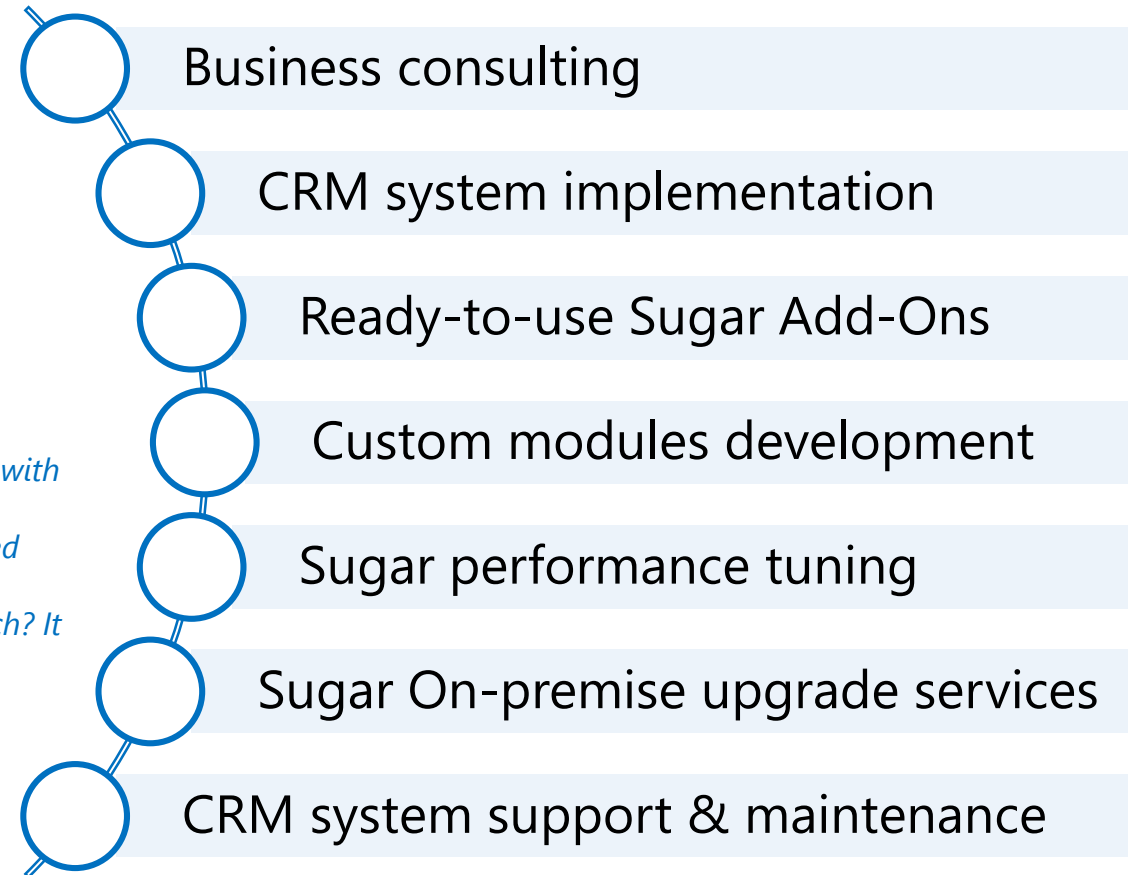
Brant Myers
Client Services Manager, Terradatum


"The tool is very visual and robust in terms of it needs to do and is very easy to implement with its visualization and ease of user experience."

Jim Ramlall
Application Implementation
Specialist, Dealer-FX

"They sent me a link to a webinar, with the exact solution I needed. It was explained in such clear and detailed steps that my pet dog could have implemented it. What was the catch? It had all been achieved with Logic Builder."

Dr. Emma Stringer
Owner, Emma Price Consulting



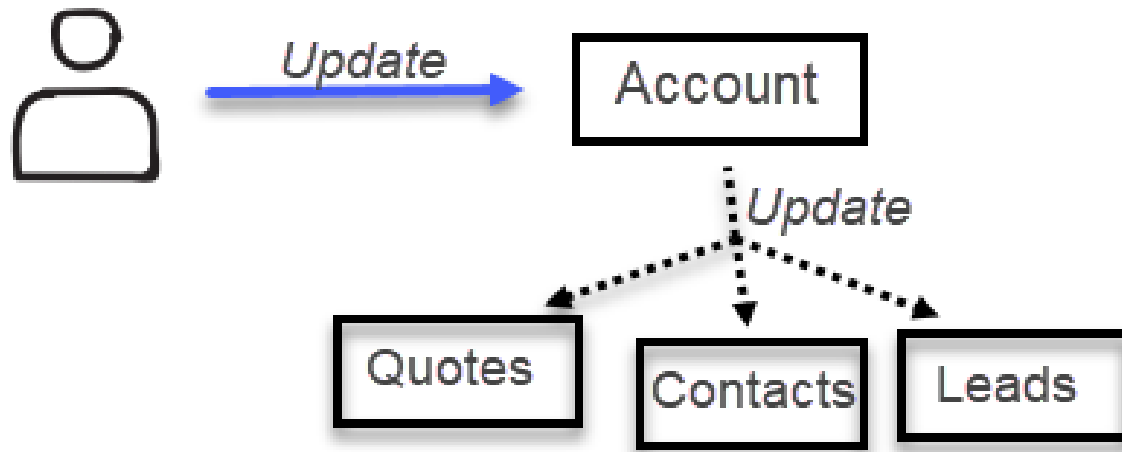
- 
- 8 groups of tasks that you can configure with Logic Builder:
- A. Manage Sugar Data
 - B. Control Data input
 - C. Identify significant Information in the data stream
 - D. Compose messages
 - E. Expand SugarBPM capabilities
 - F. Integrate Sugar without coding
 - G. Extend hardcoded behavior with configurable elements
 - H. Configure the Events for collecting on the Timeline

Manage Sugar data

A B C D E F G H

1 2 3 4 5 6 7

Populate Sugar data model with data changes



CASE A1:

Whenever Address is changed for Account record, update data:

- for all the Contacts of this Account,
- for Leads in handling,
- for open Quotes

The Challenge [click to watch](#) [10 sec]

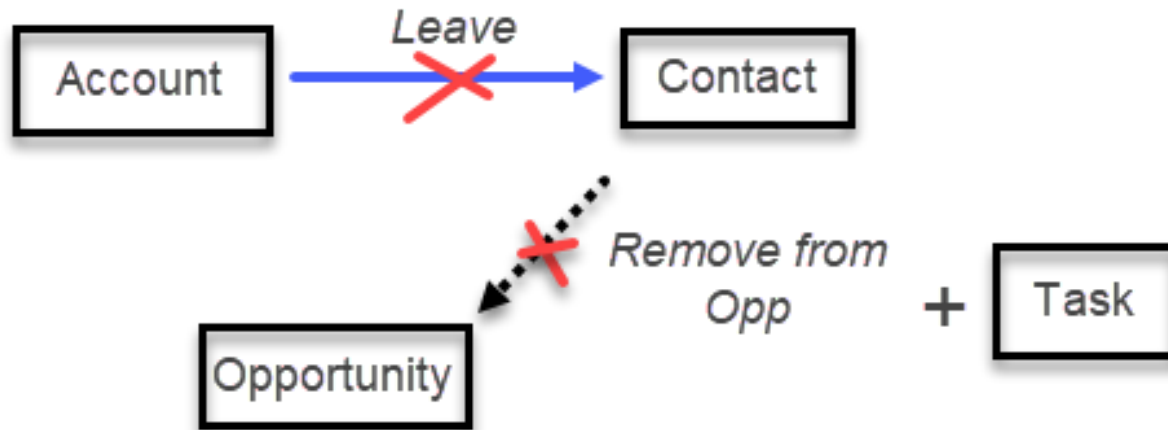
The Configuration [click to watch](#) [3 mins]

Manage Sugar data

A B C D E F G H

1 2 3 4 5 6 7

Populate Sugar data model with relations changes



CASE A2:

When Contact leaves the Company:

- exclude Contact from Opportunity influencers
- assign Task to refresh the list of Contacts

The Challenge [click to watch](#) [15 sec]

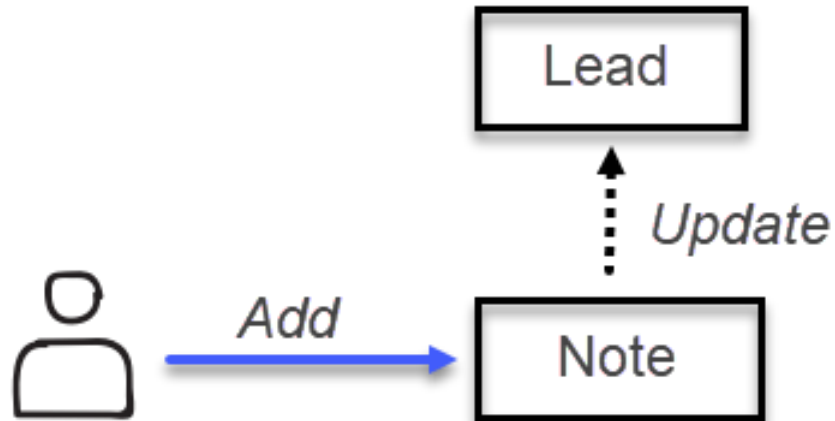
The Configuration [click to watch](#) [2 mins]

Manage Sugar data

A B C D E F G H

1 2 3 4 5 6 7

Trigger actions automatically



CASE A3:

When a new Note for the Lead appears, the Lead changes the status to In Process

The Challenge and

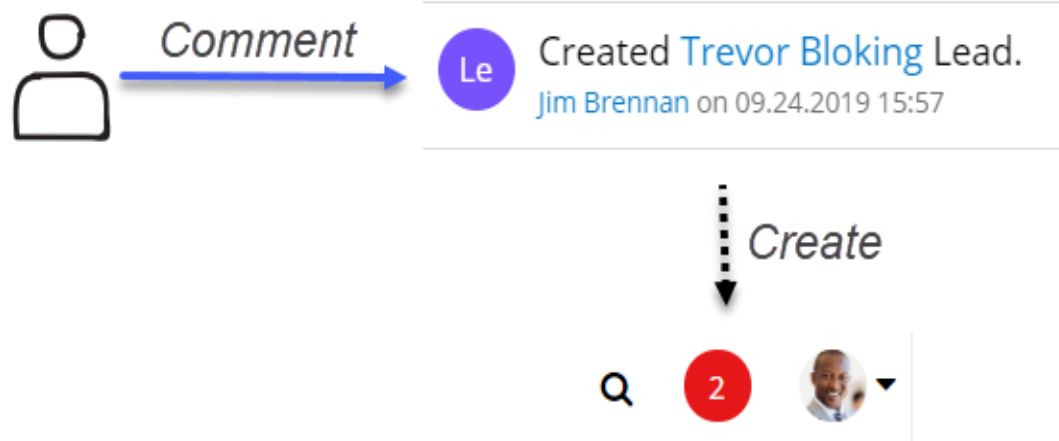
The Configuration [click to watch](#) [1.5 min]

Manage Sugar data

A B C D E F G H

1 2 3 4 5 6 7

Notify a user



CASE A4:

When Activity Stream post is commented, alert a user via Sugar Notification

The Challenge [click to watch](#) [8 sec]

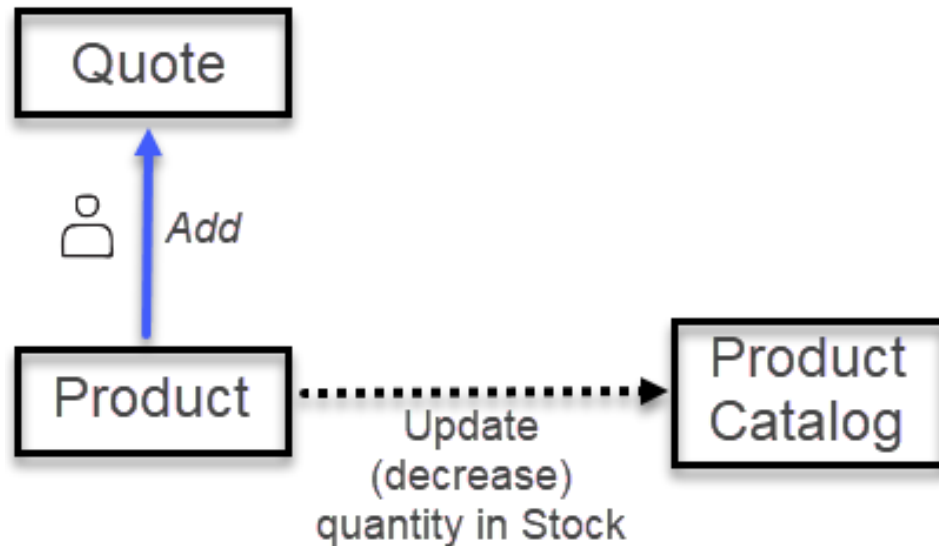
The Configuration [click to watch](#) [1 min]

Manage Sugar data

A B C D E F G H

1 2 3 4 5 6 7

Keep a product catalog up-to-date



CASE A5:

When the Product is Ordered,
decrease its in-stock quantity in Product Catalog

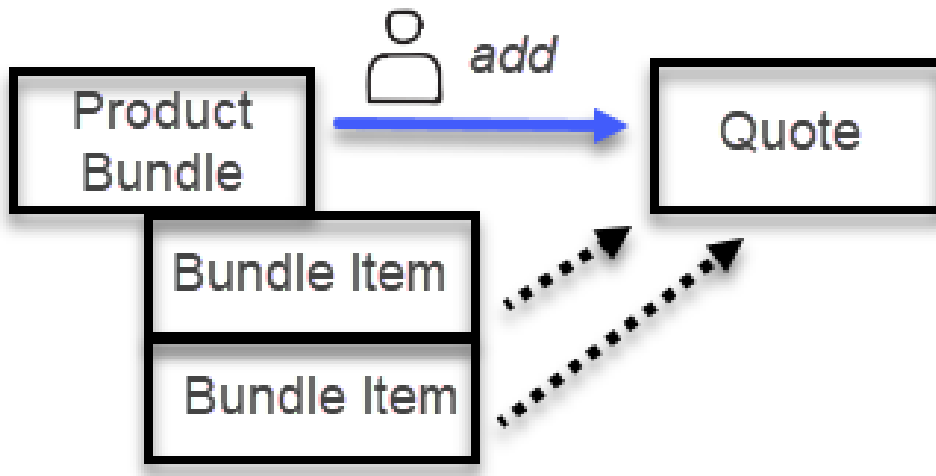
The Challenge and
The Configuration [click to watch](#) [2 min]

Manage Sugar data

A B C D E F G H

1 2 3 4 5 6 7

Speed-up offering via routine automation



CASE A6:

Populate Quote with Products
whenever a user offers the Package of Products

The Challenge [click to watch](#) [36 sec]

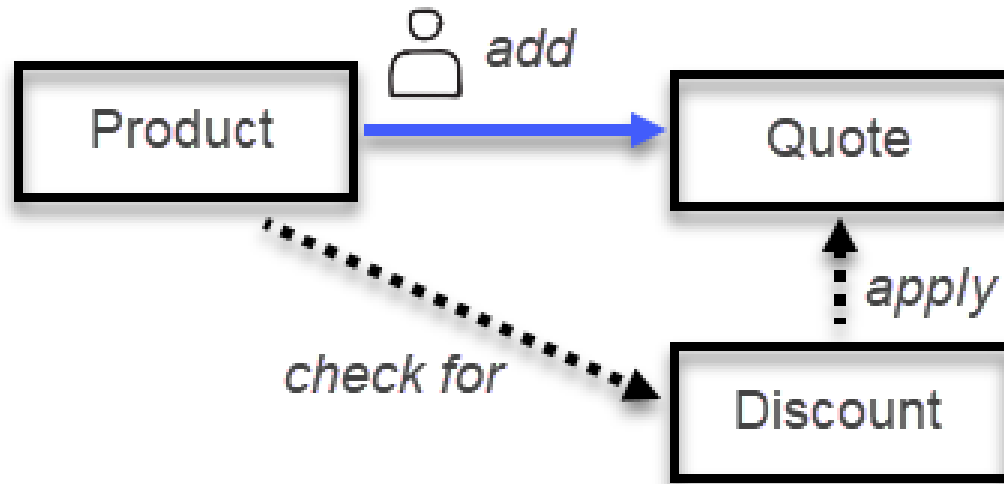
The Configuration [click to watch](#) [3 min]

Manage Sugar data

A B C D E F G H

1 2 3 4 5 6 7

Apply corporate sales rules



CASE A7:

Apply corresponding Discount for Category of Products from Particular Vendor whenever the Quote with Vendor's Products is composed

The Challenge [click to watch](#) [40 sec]

The Configuration [click to watch](#) [1 min]

Adding data control to Sugar Views

A B C D E F G H

Keep you CRM data consistent, complete and valid



CASE B1:

Opportunity Contacts must be defined to move Opportunity to Perception Analysis Stage

The Challenge [click to watch](#) [22 sec]

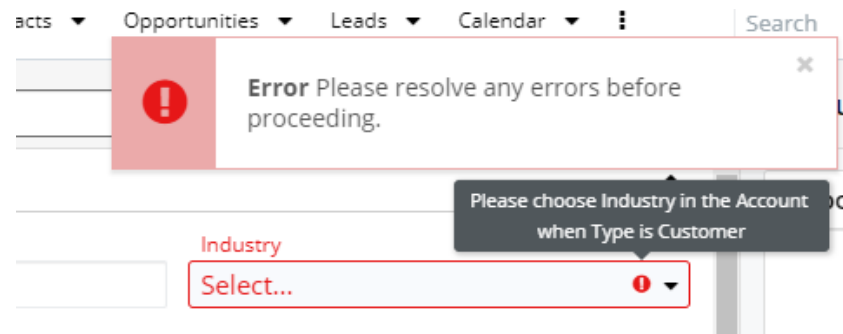
The Configuration [click to watch](#) [1 min]

CASE B2:

All the USA phone numbers must start with +1 code

The Challenge [click to watch](#) [21 sec]

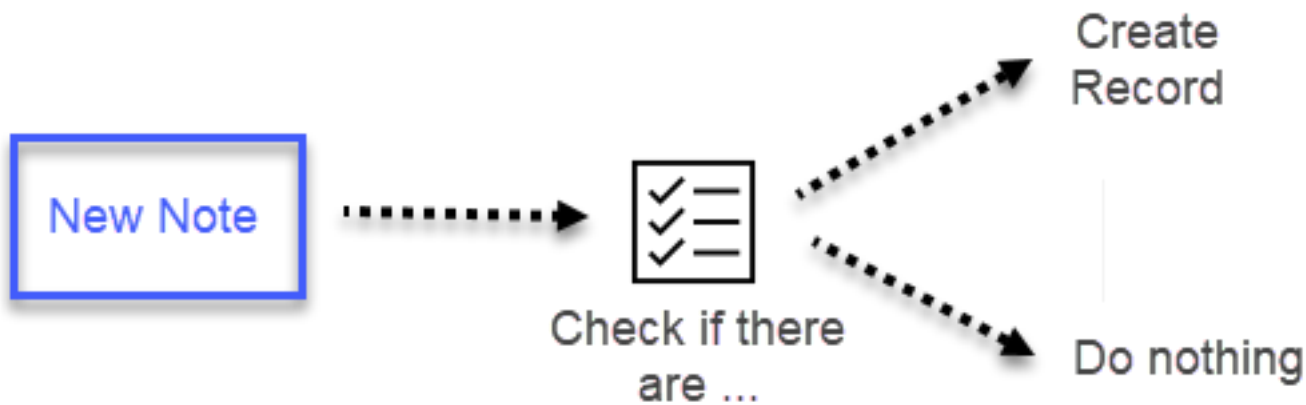
The Configuration [click to watch](#) [1 min]



Identify significant info in data stream

A B **C** D E F G H

Make smart decisions and provide ready-to-use information



CASE C1:

If a new Note with keywords 'draft' or 'agreement' and with attachment is added then create a new record for Custom Records module

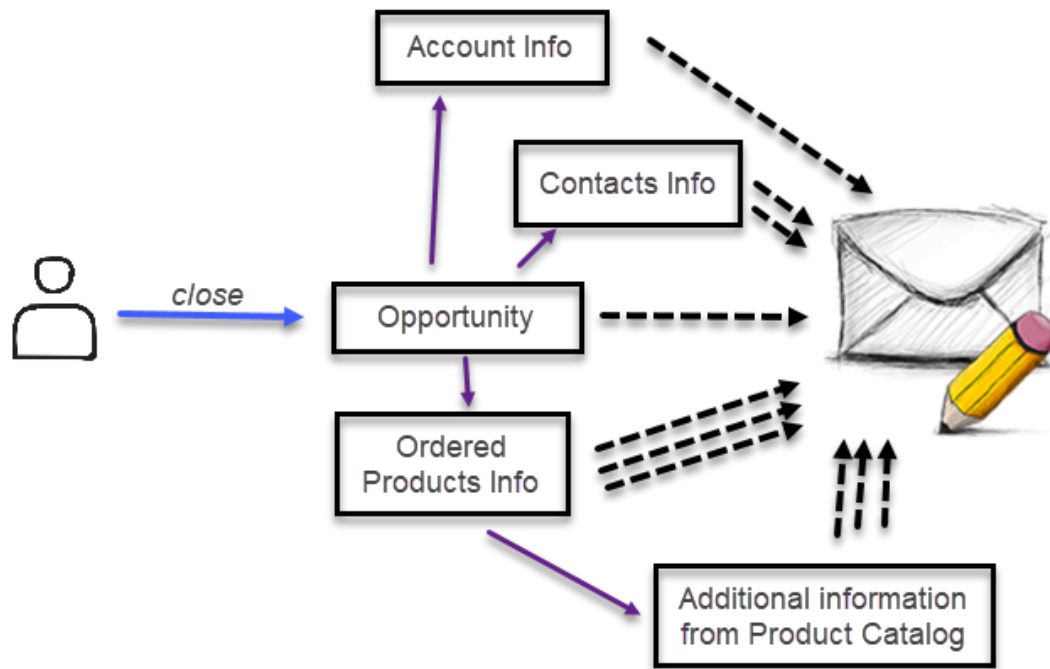
The Challenge [click to watch](#) [41 sec]

The Configuration [click to watch](#) [44 sec]

Compose Email messages

A B C **D** E F G H

Leverage CRM data to compose message content



CASE D1:

Whenever Opportunity is Won, send Email with the full Order Spec to Engineering Department

The Challenge [click to watch](#) [31 sec]

The Configuration [click to watch](#) [1 min]

CASE D2:

Prior to communicating to a new Lead:

- validate its email address automatically or create Task to check an email address manually
- send consent request to Lead

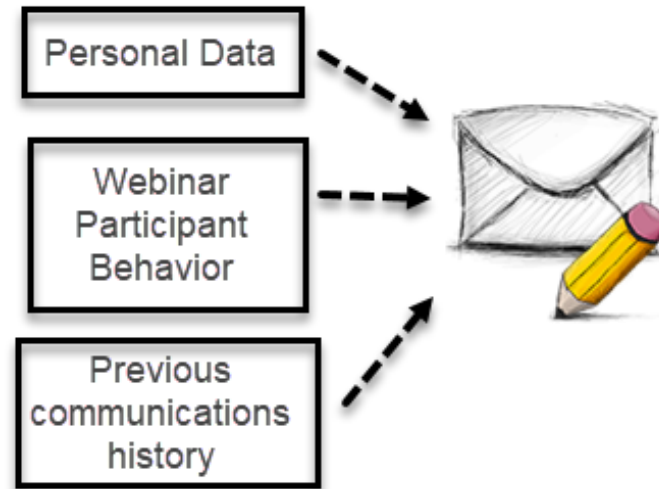
The Challenge and

The Configuration [click to watch](#) [30 sec]

Compose Email messages

A B C D E F G H

Use omnichannel behavioral data for composing outbound communications



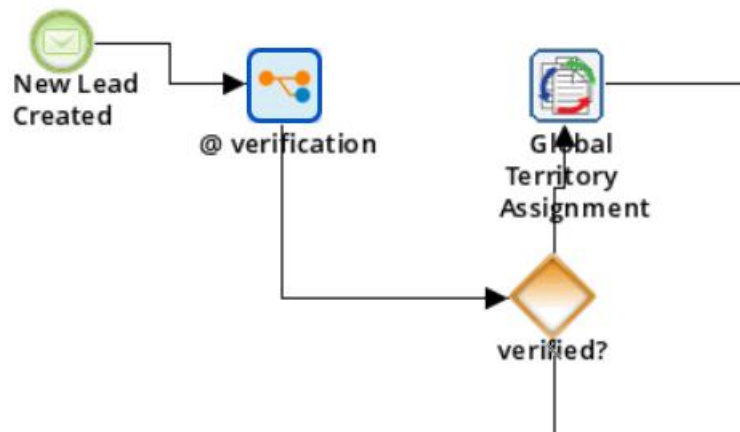
CASE D3:

Follow-up GoToWebinar participant with custom email message content, which is based on participant's behavior as well as key events collected on they timeline

The Challenge [click to watch](#) [2min]

The Configuration [click to watch](#) [1.5min]

Manipulate data freely while supporting the business process with BPM



CASE E1:

Verify Lead's email address prior to assigning Lead to SalesRep, helping to focus on truly reachable Leads

The Challenge [click to watch](#) [42 sec]

The Configuration [click to watch](#) [2 min]

CASE E2:

Support promo by applying Marketing Campaign Discount to the Category of Products automatically when Sales Representative is composing the Quote

The Challenge [click to watch](#) [40 sec]

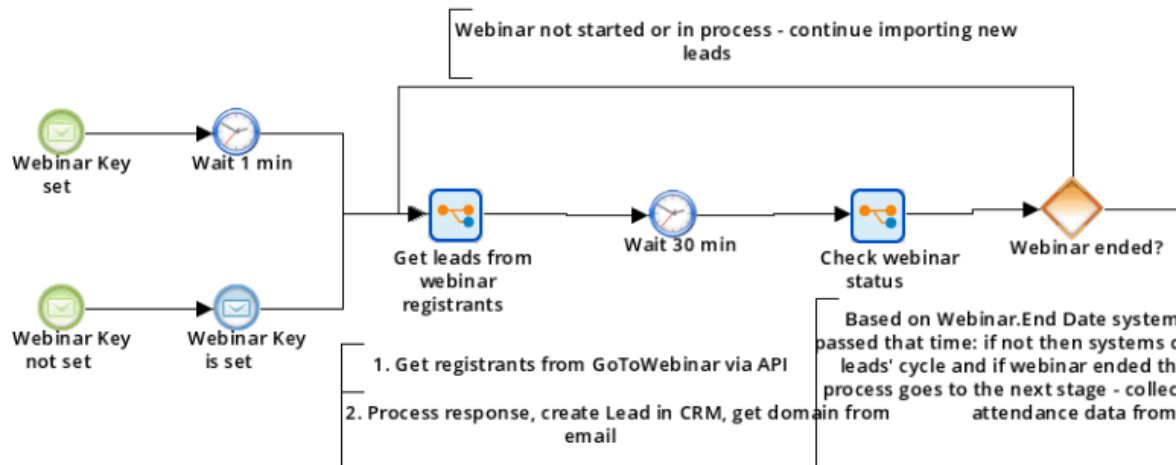
The Configuration [click to watch 1](#) [30 sec]

[click to watch 2](#) [1 min]

Expand SugarBPM

A B C D E F G H

Orchestrate omnichannel data with Sugar BPM



CASE E3 :

Retrieve GoToWebinar Registrants list ...

The Challenge [click to watch](#) [1 min]

The Configuration [click to watch 1](#) [2 min]

[click to watch 2](#) [50 sec]

... and follow-up participants

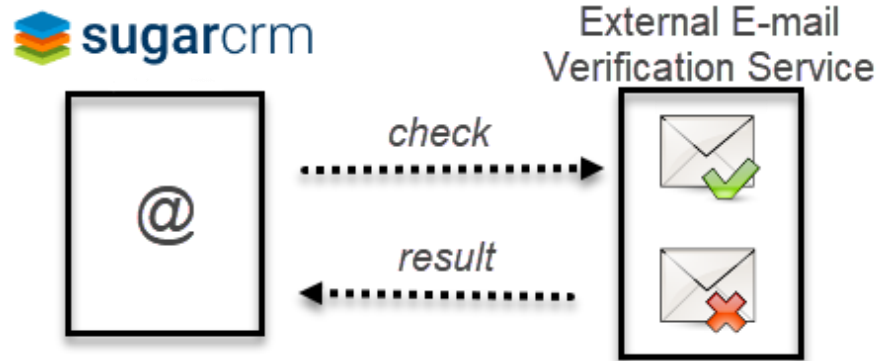
The Challenge [click to watch](#) [2 min]

The Configuration [click to watch](#) [1.5 min]

Codeless Integration with systems

A B C D E **F** G H

Configure external data exchange



CASE F1:

Focus SalesReps on contacting reachable Leads only via email verification by External Email Verification Service

As a part of SugarBPM workflow:

The Challenge [click to watch](#) [42 sec]

The Configuration [click to watch](#) [2 min]

As a standalone solution:

The Challenge [click to watch](#) [30 sec]

The Configuration [click to watch](#) [2.5 min]

Codeless Integration with systems

A B C D E F G H

Include key details that matter for a Big Picture



CASE F2:

Register client's Tier change in CRM by tracking score change in Scoring System

The Challenge [click to watch](#) [34 sec]
The Configuration [click to watch](#) [2 min]

Codeless Integration with systems

A B C D E F G H

Include key details that matter for a Big Picture



CASE F3:

Integration with GoToWebinar Platform to get the list of the Webinar Registrants, track attendees' webinar feedback and send custom follow-ups

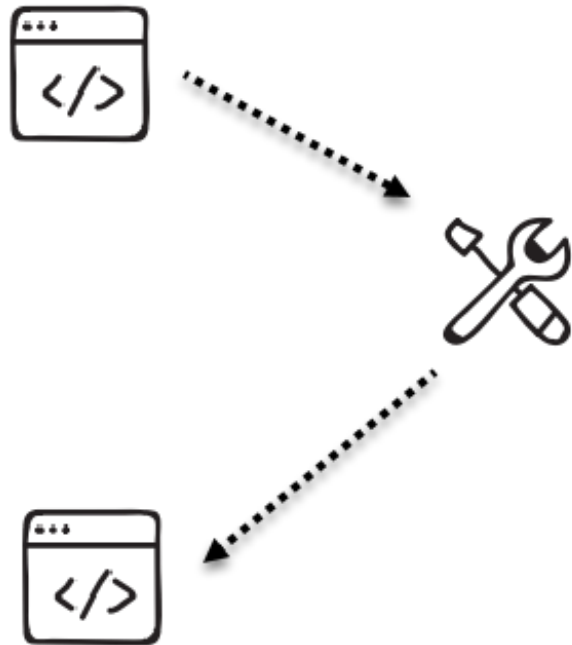
The Challenge [click to watch](#) [1 min]

The Configuration [click to watch 1](#) [2 min]
[click to watch 2](#) [50 sec]

Add configuration to hardcoded behavior

A B C D E F **G** H

Make the logic of data import manageable



CASE G1:

Call Configurable Logic from External System to import data into Sugar

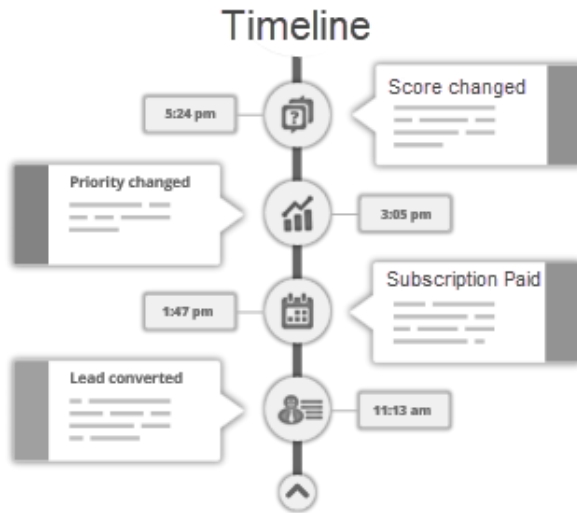
The Challenge [click to watch](#) [34 sec]

The Configuration [click to watch](#) [2 min]

Configure the Events for collecting

A B C D E F G H

Consider Big Picture which is made up of events that truly matter for making decisions



CASE H1:

Collect actions that take effect on Sales Funnel

The Challenge [click to watch](#) [20 sec]
The Configuration [click to watch 1](#) [1.5 min]
[click to watch 2](#) [1 min]

CASE H2:

Collect key events originated outside the CRM system

The Challenge [click to watch](#) [19 sec]
The Configuration [click to watch](#) [1 min 20 sec]



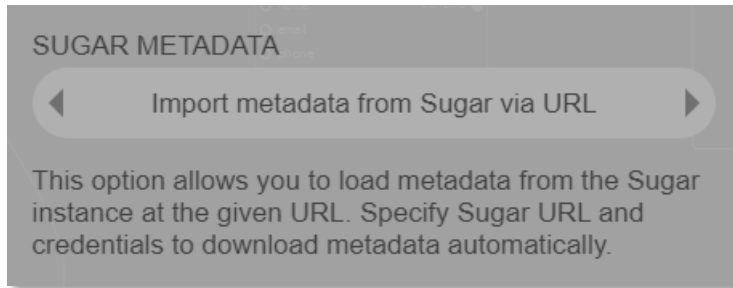
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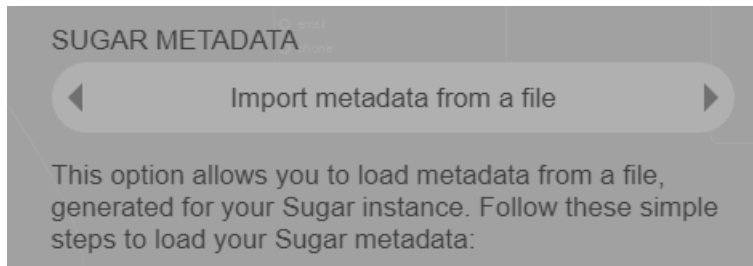
Get easy manageable solution with no coding

Choose your way of Sugar configuring with Logic Builder and reach your aim fast !

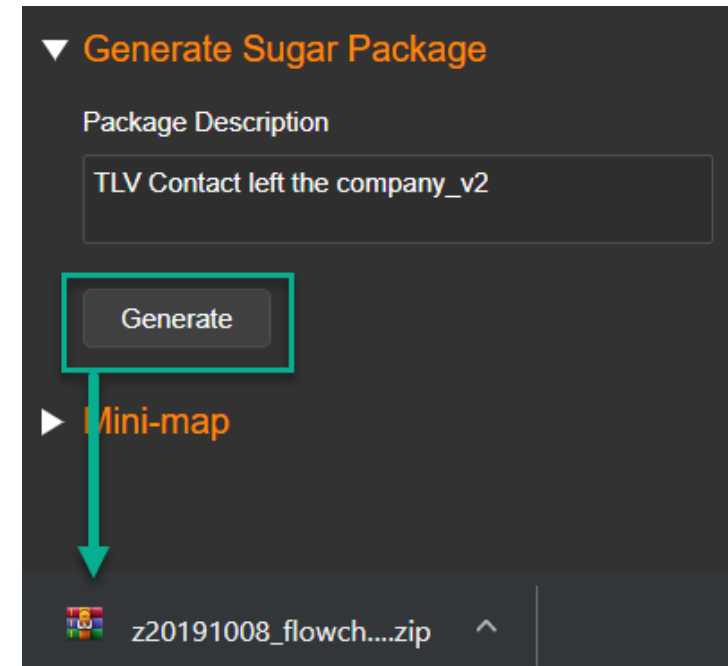
Use direct URL to retrieve custom metadata ...



... or enable configuring indirectly via metadata file upload



Easy to deploy, deliver and update



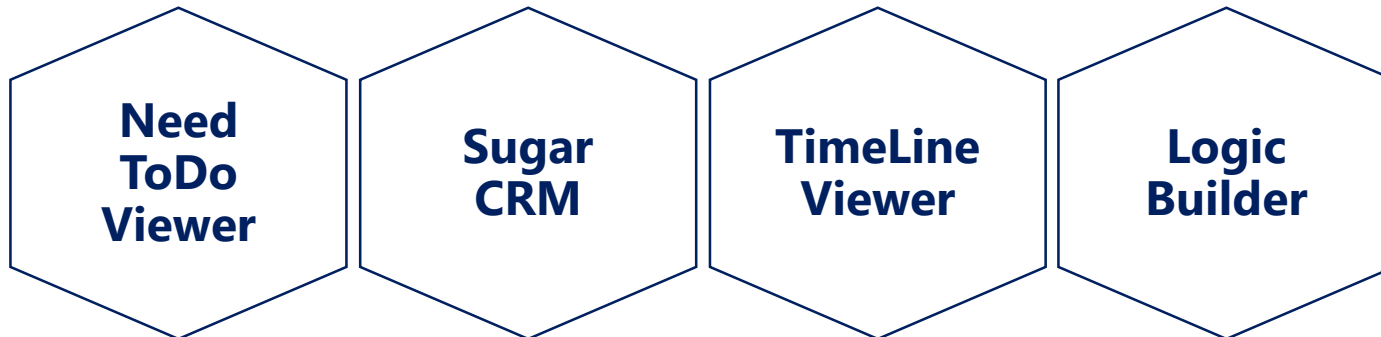
Thank you!

You can rely on our help at any time

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lbsupport@integroscrm.com



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