SUGARCRM

Sugar **UX**™

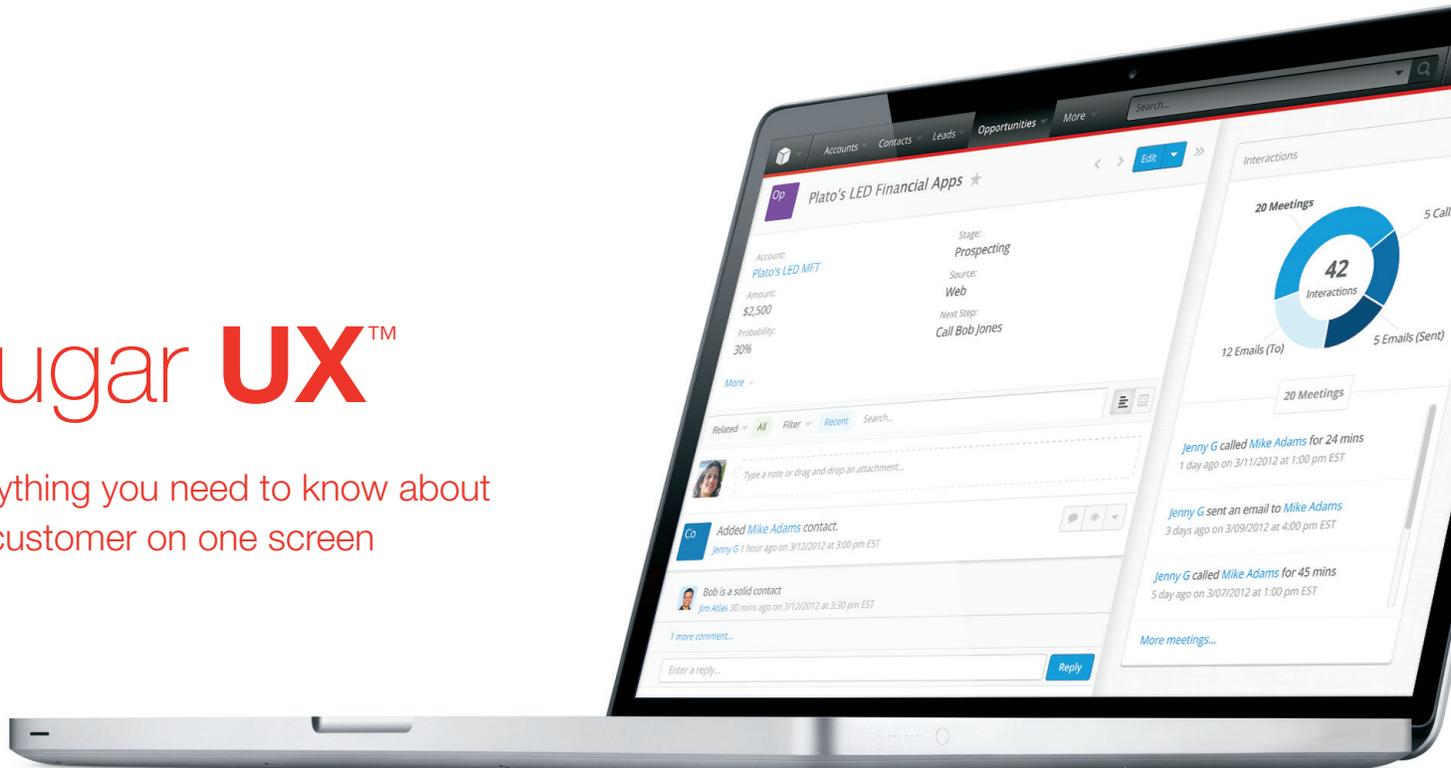## Everything you need to know about the customer on one screen

A completely transformed, individualized CRM user experience. Sugar UX fuses the simplicity, mobility, and social aspects of a consumer app with the business process optimization of CRM.

Sugar UX aims to give anyone who touches the customer the tools and information they need to drive more value out of every interaction. Sugar UX includes a groundbreaking approach to system design, with three major components aimed at creating personalized, data-rich experience for every individual user:

✔ **Context Panel:** The Context Panel is the starting point of information the individual wants to view. A business card view allows sales professionals and field agents to drill into a specific customer or contact. List view allows managers to see roll-ups of opportunities, cases, and campaigns, with time-saving preview panels to reduce clicks and increase data visibility. Whether you start with an individual or a list, all surrounding panels provide easy to digest information relevant only to the context chosen.

✔ **Intelligence Panel:** The Intelligence Panel displays aggregated information relevant to the object in the Context Panel in dashlet form. These personalized views can include internal data such as revenue, payment history, inventory, supply chain, and support cases, as well as real-time feeds from external data sources such as Dunn & Bradstreet, Xing, and Twitter.

✔ **Collaboration Panel:** The Collaboration Panel displays context-sensitive activity streams, providing at-a-glance user posts that are relevant to the Context Panel information. Unlike other "bolt on" activity streams, this provides true, relevant insight around the activities, updates and other events occurring in context, while maintaining the most pressing and relevant issues at the top of the stream. The Collaboration Panel includes both automated system actions, such as lead or case assignments, as well as more social, human-powered collaborative activities. Tagging records as favorites, or following selected records with a single click allows users to more quickly prioritize and share items in their streams for more effective collaboration between individuals and teams. Managers can follow records assigned to their direct reports to more easily monitor and support potential at-risk accounts or high priority support cases.

Sugar UX is currently available in all Sugar commercial editions.
To experience Sugar UX for yourself, start a FREE TRIAL today at
www.sugarcrm.com/try-sugar

Context Panel: Select an individual account, contact, lead, or opportunity in Business Card View, or a group of opportunities, cases or campaigns that are important to you in List View.
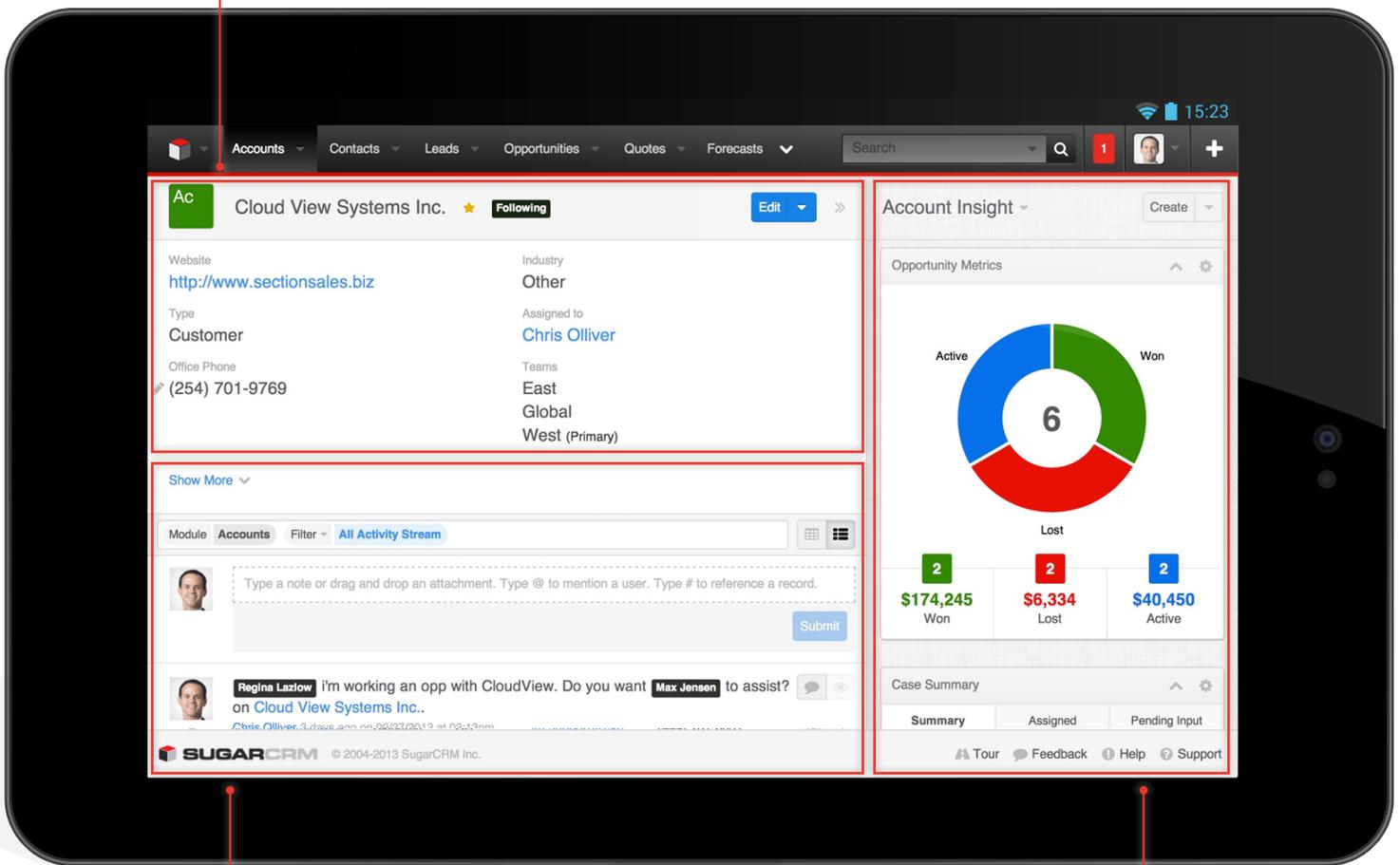
Collaboration Panel: displays a context-sensitive activity stream, providing at-a-glance user and system posts that are relevant to the individual or group selected in the Context Panel.

Intelligence Panel: displays aggregated information from internal and external data sources such as financials, inventory, and late-breaking news, relevant to the individual or group selected in the Context Panel.

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