W-Systems Sugar Add-ons & Enhancements

wActivities  wMaps  wReferrals  wTools  wUserUtils

wBenchmark  wCalendar  wDocs  wDrive

www.w-systems.com
W-Systems Knows Sugar

As a Top 5 Worldwide and Elite designated SugarCRM partner we have deployed Sugar to 100’s of organizations. We are business analysts and developers, and we want to make Sugar fit your organization like a glove.

Put us to the test, we ❤️ a challenge.

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# Table of Contents

**wActivities**: Enhanced Interaction Management ................................................................. 4

**wBenchmark**: Time Series KPIs ............................................................................................ 6

**wCalendar**: Advanced Calendar Configuration.................................................................... 8

**wDocs**: Document Automation .......................................................................................... 10

**wDrive**: Dropbox, Google Drive & OneDrive ..................................................................... 12

**wMaps**: Integration to Bing Maps ....................................................................................... 14

**wReferrals**: Cross-Selling & Referrals .............................................................................. 16

**wTools**: Custom Enhancements and Integrations ............................................................... 18

**wUserUtiles**: Advanced User Tools ................................................................................... 20

**Sugar Connector to DocuSign** .......................................................................................... 22
SugarCRM enables businesses to create customers for life with the world's first intelligent, no touch customer experience (CX) platform. W-Systems offers a series of add-ons to Sugar to extend its core capabilities.

Meet wActivities: Enhanced Interaction Management for Sugar

Get quick access to all of your customer interactions and boost employee productivity with wActivities. Our Sugar customization aggregates Calls, Meetings, Emails, Tasks, Cases, Notes, and any custom activities in a single place, effectively reducing the time and clicks spent on daily activity planning and review.

Features

Easily Access Your Activities
wActivities collects past and upcoming Calls, Meetings, Emails, Tasks, Notes, and any custom Sugar activities in two filter-enabled subpanels for quick and easy access, significantly reducing the time it takes to check your planned and past activities.

Search and Filter Activities
The Activities and History subpanels allow you to create filters and quickly get an overview of your team’s schedules and actions. You also have the ability to search for specific activity records using search keywords in the subject or description.
In-Depth Customization Options
Go beyond standard Sugar activities—wActivities can be configured to sync with custom modules, allowing you to tailor your activities for your business needs.

Enhanced Historical Summary
wActivities includes an enhanced version of Sugar’s out-of-the-box Historical Summary, allowing you to create filters for your activities, and sort by fields.

Quickly Create Any Activity
The Activities and History subpanels include Create actions for all of your activity types, allowing you to plan and log your calls, meetings, tasks, and much more with just a few clicks. You can also customize your available actions, and the default Create action.

Enhanced Module Relationships
Enhanced module relationships enable you to add additional modules where the activity records will be displayed. For instance, logging a call to a support case will also automatically link the call to the related account and allow you to quickly view the call activity in the account record.

Report on Multiple Modules
As wActivities collects aggregates all of your interactions in a single modules, it enables you to report data from multiple modules, such as reporting on every activity type your support team has had on a weekly basis.

Detailed Historical Narrative
If you need to take a more in-depth look at your activities and interactions, the Historical Narrative panel includes the full content of your records, including file attachments.

In-Depth Subpanels Customization
The Activities and History subpanels included in our interaction management customization for Sugar enable you to update filters, actions, labels, and much more.
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**Meet wBenchmark: Time Series KPIs in Sugar**

With wBenchmark, you can define, capture and visualize Key Performance Indicators (KPIs) inside Sugar. wBenchmark adds the unique capability to capture and store KPIs from any Sugar standard or user-defined modules at specific points in time such as daily, weekly, monthly, quarterly, and yearly periods.

**Features**

**Build Beautiful Charts**

wBenchmark enables you to chart dashlets containing easy to follow data on your KPIs, and add them to your Sugar dashboard.

**Metrics Definitions**

wBenchmark automatically adds a new Metrics Definition module, where users can add new metric definition sets and detailed metric definitions.
User and Team Goals

wBenchmark adds a Goals module where Goal sets can be added for users, teams or all users. Goals can be defined for any recurring time period and may be different at different points in the year.

Leaderboard Visualization

wBenchmark adds a new leaderboard chart type to visualize a team's relative performance on a specific KPI. The leaderboard chart can track progress to goals or compare against an average.

Time Series Visualization

wBenchmark adds a new Time Series chart dashlet that displays metrics over time as either an Area Chart, a Line Chart, or Stacked Bar Chart.

Track KPIs From Any Time Period

wBenchmark allows you to measure and compare performance from any time period and can be customized to your specific targets, fiscal years, and company policies.

Goal Import Tool

Users with many monthly goals can import Goals from a CSV file. The newly created goal will be related to the record where the Upload Goal button is clicked.
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Meet wCalendar: Advanced Calendar Configuration

wCalendar is a customizable calendar solution for Sugar to display any standard or custom Sugar module on a calendar. In addition to viewing calendars directly in Sugar, you can embed calendars into workflows, dashboards, and layouts allowing you to present record-specific, dynamic calendars for better decision making.

How is wCalendar different than the standard Sugar calendar?

- **Color Coding**
  Easily distinguish calendar entries and set coloring conditions

- **Filters**
  Multiple filtering options allow you to view only what’s important

- **Embedded Calendars**
  Insert on your dashboards, and module list and record view layouts

- **Flexible Event Sourcing**
  Utilize calendar events from any Sugar module

- **Module Calendars**
  Attach calendars to any Sugar module

- **Drag and Drop**
  Modify dates, times, and corresponding records in real time

- **Custom Event Text Display**
  Configure event text from any module field
Features

Manage and Edit Events with Ease

From the wCalendar panel, you can create, edit, move or delete events with ease. All it takes is a few clicks, or dragging and dropping.

Adjustable Calendar Display

Choose whether to display the events in your calendar by day, work week (5 days), week (7 days), month or as an agenda or timeline.

Highly Customizable Events

wCalendar’s settings offer a wide variety of customization options for events, such as choosing colors, setting up a display template for each event type, or control whether they can be created, updated or removed.

Tailor Event Types to Your Organization’s Needs

Whether your company uses Sugar for sales, marketing efforts, customer service or even project management, you can create event types to keep up with meetings, calls, track tasks, or even project goals and deadlines.

Export Your Calendar as a PDF

Download your calendar for offline viewing as a PDF file. The exported calendar will use the same display you have chosen in Sugar.

wCalendar Dashlet

Create and configure the wCalendar dashlet to display scheduled events for a whole module in the List View, or just the events of a single record inside the Record View.

Export or Publish Your Calendar

You can either use the iCalendar Export option to export your Calendar as an ics file, or choose the iCalendar Publish option and paste the URL in your email client, such as Google Calendar, Outlook, etc.

View Specific Users’ Events

If you need to view your employees’ schedules, wCalendar enables you to see the events of specific users, including your own.
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**Meet wDocs: Sugar Document Automation**

A common need among Sugar users is the ability to create letters, contracts, proposals, mailing labels, and forms. Meet wDocs, a tool to quickly create Microsoft Word templates that can be used to merge information from any module in Sugar into a presentation-quality document.

**Sample documents include:**

- Account Profiles
- Casework Orders
- Contracts
- Mailing Labels
- Proposals

**Features**

Create Polished Microsoft Word Documents Natively from Sugar
Easily and automatically generate documents your users need from Sugar. Examples of files can include (but are not limited to) Letter Templates, NDA Agreements, Quotes, Statements of Work, Account Visit Planning Reports and more.
Merge Multiple Records from Related Tables
Create documents with merges of data from one-to-many relationships. For instance, when merging a document from the Account module, include information from the related contacts or meetings modules for the account.

Merge to Your Local Computer as a Sugar Linked Document
Keep all documents within your Sugar instance as linked documents instead of downloading to your local computer. The files then will be accessible by anyone within Sugar. wDocs will merge and directly attach the merged document as a linked document in Sugar.

Merge Information from any Combination of Modules
The document automation module can merge any module related data from Sugar into a predefined Word template. For instance, from the Accounts module, quickly generate a contract or letter template.

Mass Record Merge from Module List Views
From Sugar list views, select multiple records to create multiple merge documents. When in the Accounts list view, select multiple accounts and generate a merge of address labels or letter templates for those accounts.

Merge Using Microsoft Word Template and Auto Convert to PDF
Once your Microsoft Word Template is uploaded, you can choose between downloading the final merged file as either an MS Word or PDF document. Design your templates in Word but output directly to PDF formatting.

Generate Labels
This feature allows you to merge multiple records into label documents or labels. You may customize the content of labels by creating document templates.

Document Template Builder
Easily create your own formatted Google Docs or Microsoft Word documents from module or related module fields. You can also quickly generate tables and format various field types including date, boolean and text.
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Meet wDrive: Dropbox, Google Drive & OneDrive in Sugar

Organizations struggle with user adoption when their employees have to log in to too many platforms. Manage your documents and customer relationships in one place with wDrive. The connectors to Dropbox, Google Drive, and OneDrive enable you to access your documents directly within Sugar in real-time.

Features

Your Document Storage in Sugar

Download and upload files to and from your local drive to Google Drive, Dropbox, or OneDrive. Your documents stay synced in real time.

Create Docs From Sugar

Use a one-click button in Sugar to create a document from a template in Google Drive, Dropbox, or OneDrive.
Create Shareable Links

Use shareable links to send documents to co-workers, customers, partners, and more.

Folder Options

wDrive enables you to create and define your file and folders structure. You also have the option to set a default file path for your documents.

Drag & Drop Your Files to Sugar

Use drag and drop to easily and quickly upload files to your document storage solution in Sugar.

Merge Documents with wDocs

wDrive can work together with wDocs, our Document Automation solution for Sugar, and directly stores any merged documents to in the cloud.
Sugar Integration to Bing Maps

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**Meet wMaps: Sugar Integration to Bing Maps**

Using wMaps, our integration to Microsoft Bing Maps you can view any list of Sugar accounts, contacts, leads, targets, opportunities or any other Sugar module plotted on a map. You will also be able to see quickly what accounts or leads are in closest proximity to each other and plot the results on a map or generate directions for a visit. The maps we generate are content rich and can incorporate details from your Sugar records directly on the maps.

**Features**

**Search Sugar Records by Distance from Postal Code**
You are holding an event and would like to invite all customers within 50 miles from the event location. With wMaps you can filter accounts list view using a new Distance search option and specify distance from a postal code's center point. You can save the result set to a Sugar target list for marketing purposes.

**Map Sugar Filtered Records**
You would like to see the distribution of customers or prospects in a specific territory. With Sugar you can create a filter in the accounts module to list the customers in a specific territory. wMaps can display the result of that list as pushpins on a map.

**Map Current Records**
You have a new prospective account and would like to get some geographic context and take a look at their office building. wMaps can produce a map that can be zoomed in all the way to the aerial photo detail of the building or location in question.

**Generate Optimum Driving Directions**
You are planning to travel in your sales territory and would like to plan the best sequence of account visits. From a filtered list in Sugar, select the specific accounts you would like to visit. wMaps can generate optimal directions and display the directions on a map. The directions can be emailed to your phone to integrate with maps on the phone.
Show Closest Records
You are visiting a customer and would like to see a list of the closest prospective customers or other customers so you can plan some additional stops. wMaps will calculate the relative distance between the current record and all other records, and then show you the closest ones. From the list of closest records you can place them on a map or generate optimum driving directions.

Send to Mobile Device
You have generated a map or directions and want to be able to send them to your own phone or a colleagues phone. Any wMap can be sent to your phone via email. In the top right of a map or directions screen there will be a Send via Email button. Press this link to generate an email with a link to the map that can be opened on your phone.

Draw on Maps
You need to further modify your generated maps with custom maps or areas. Maps can now be customized with objects such as lines, shapes and pushpins. All modifications can be saved and accessed for later use.

wMaps Field and Dashlet
If you need quick access to a record’s mapped location in Record View, wMaps includes a field and dashlet that support multiple display views, including Road, Aerial, Street Side, and Bird’s Eye.

Save Maps
You can create and customize as many maps as needed. These maps can then be saved, and accessed at any time from Sugar.

Filter by Drawing
You can select an area on the map and all the records in that area will automatically generate. It also allows saving the filter for later use.

Manually Geocode Records
You need fast and accurate access to a record’s location on the map. Geocode Records Manually allows you to pinpoint an exact address on the map for better accuracy.

Enable wMaps for Any Module
You can enable wMaps for any module by simply mapping the module either by address or by a related record.
Create Internal Referrals

wReferrals enables you to refer records internally, from one Sugar user to another. Any internal referral automatically links to the record’s Account and Contact, so the receiver has immediate access to it when receiving the referral notification.

Send External Referrals

External referrals made are sent to sources outside of your Sugar instance. When created, an email notification is sent to the receiver. You can also include URLs to the records in Sugar if the receiver has access to your CRM instance.

Meet wReferrals: Cross-Selling and Referrals in Sugar

Most organizations struggle with how to effectively encourage and enable sales teams to make referrals to peers. If you have different sales teams handling your product and services or send referrals to business partners, wReferrals is a tool that helps you simplify and automate the product and service Referral process.

Features
Receive Notifications

Based on the referral's source (internal or external), wReferrals can either send a notification in Sugar to the receiving user, or send an email message to the external source.

Track Referrals

wReferrals adds a custom module in Sugar where you can view all of your referral records or filter them by any criteria. Sugar also enables you to view the Referrals module's data in a dashboard.
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**Meet wTools: Made by W-Systems, with ❤**

As we work with our customers to deploy Sugar within their organizations, our team of developers produce enhancements and integrations that showcase the full flexibility that Sugar offers. Available at an annual cost of $80 per licensed Sugar user or free for W-Systems customers with wCare.

**Product Library Examples**

**Drill Down Report Chart Dashlet**

This module adds a ‘Drill Down’ link to any Saved Report Chart Dashlet placed on a dashboard. Clicking the link opens the related report in a new browser tab. It also allows users to click on any chart element to view its detailed data and lets them configure default chart element colors.

**Embedded Content Field**

The Embedded Content Field allows users to embed social media content to records. It can also be modified to display custom content using Sugar module fields (i.e. create custom business cards).

**Custom Buttons**

Custom Buttons is a field type which can add buttons in dashlets, list and record view. This field type supports adding multiple actions on the same Custom Button and covers a variety of capabilities, reducing the time and hassle needed to go through manually through different menus to complete those actions.
Gauge Chart Dashlet
This dashlet is configurable to measure a numeric field aggregate value from any module and display the results in a gauge type chart.

Custom Notification Field Type
This customization adds a variation of a text field that allows the creation of special font and color formatted notifications on a record.

Create Note Function in List View
The Create Note Function in List View adds a new ‘Create Note’ option to the row action menu in list view.

Colored Fields
The Colored Field functionality provides the ability to create new fields that have a background color set from another field or selected in particular for each one in Edit View.

Double Click to Edit List View Row
This module makes it faster to edit a row in list view mode. Double-click the row and it goes into edit mode, replacing the need to press the row action menu and the edit choice.

Custom Results per Module Dropdown
This menu lets Sugar users control the number of records displayed in a list view. The dropdown also saves the number of records you’ve chosen to view for each Module with a list view.

Sparkline List Dashlet
The Sparkline List Dashlet is a dashlet designed to be used on list views which enables users to view a list of records from a specific module in Sugar, along with graphic representation on top of each column.
Advanced User Tools

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Meet wUserUtils: Advanced User Tools for Sugar

Effortlessly manage your Sugar user and team settings with wUserUtils. Our customization for Sugar administrators allows you to easily copy dashboards, filters, locale settings, making new user setup quick and easy.

wUserUtils also enables your admins to troubleshoot user issues and broadcast global messages in Sugar.

Features

Clone User Settings

wUserUtils can significantly reduce the time it takes to set up new Sugar users by allowing you to clone filters, dashlets, email settings, and much more from existing users. Note that cloning will overwrite existing user settings.

Copy Dashboards

You recently built out a new dashboard and need to share it with your team. wUserUtils allows you to select specific dashboards from any Sugar module and send it to any team or user, without overwriting their existing settings.
Share Filters

If your team uses the same List View filters, you won’t need to ask employees to manually build them out—wUserUtils can easily copy a user’s filters and share them with others.

Mass Update Locale Settings

wUserUtils enables you to mass update locale settings, such as date and time, currency, and more. It also allows you to copy these settings to users or teams based on your employee locations.

Maintenance Mode

wUserUtils allows your admins to prevent regular Sugar users from logging in. This functionality can be used while performing upgrades, troubleshooting issues, or running resource-heavy processes.

Remove Filters or Dashboards

One of your employees has transferred to another team or your current dashboards have become deprecated. wUserUtils enables you to easily remove dashboards or filters from users and teams.

Impersonate Users

If you want to check the updates made through wUserUtils, the Login As functionality enables you to view how specific users see Sugar while logged in. This functionality is also useful for troubleshooting user-reported issues.

Broadcast Messages

With wUserUtils, you can set up and schedule global messages, informing your Sugar users of any planned admin activities, such as maintenance or upgrades. This message will also get displayed on the login screen.
Send, Sign, Success

DocuSign® is the global standard for electronic signature, offering the easiest, fastest, most secure way to send, sign, track and store documents in the cloud. Integrated with all editions of Sugar, DocuSign for Sugar helps sales users close more business more quickly. Users can configure and send envelopes from the DocuSign dashlet on almost any object in Sugar, and your customers can sign documents from any browser, including mobile devices, within minutes.

DocuSign enables many different scenarios, including:

- Counter offers
- Multiple signers
- Confirmation of a signer’s authority to sign
- Specified signer routing order
- Designation of specific fields as negotiable
- Delegation of signing responsibility to others

Key Features

- Drag and drop the DocuSign dashlet on any object (included on Accounts, Contacts, Leads, Opportunities, and Quotes by default)
- View envelope statuses for a summary of where your documents are
- Signed documents are automatically stored back as a PDF onto the originating record in Sugar
- Send documents for signature right from the dashlet, and use the familiar DocuSign interface to add or edit tags within Sugar
- Get real-time alerts on document status changes from your activity feed
Features

Easy-to-Use Dashlet

The DocuSign dashlet enables you to send and track documents directly from within Sugar, and can be added to any module, including Accounts, Contacts, Leads, Opportunities, and Quotes.

Send Documents for Signature

Using the Sugar Connector to DocuSign dashlet, you can send documents to your contacts for signature without having to switch browser windows.

Envelope Statuses

The Sugar Connector to DocuSign dashlet allows you to track your sent documents status directly within Sugar.

Real-Time Alerts

With our DocuSign integration, you can receive real-time notifications on document status updates in Sugar.

View Signed Documents in Sugar

The Sugar Connector to DocuSign automatically stores your signed documents as PDFs in Sugar, and links them to the originating record.

wDocs and wDrive Support

Easily create ready-to-sign documents using wDocs, and then send them to DocuSign, or directly from your cloud storage solution using wDrive - all directly within Sugar!