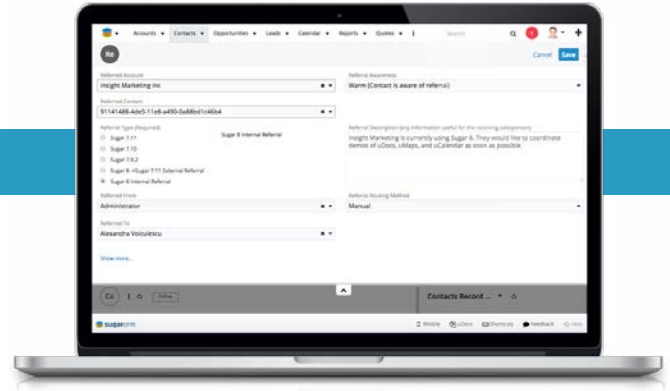




wReferrals: Cross-Selling & Referrals in Sugar

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.



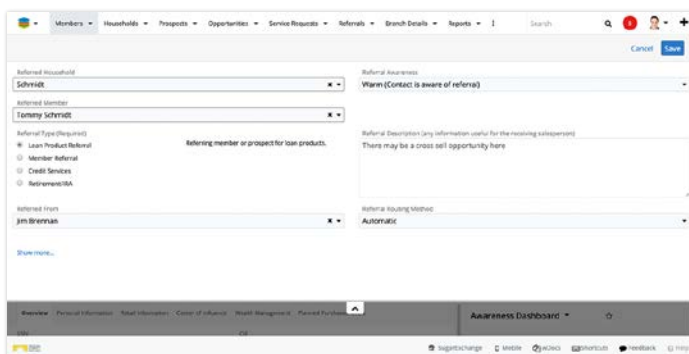
Meet wReferrals: Cross-Selling and Referrals in Sugar

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.

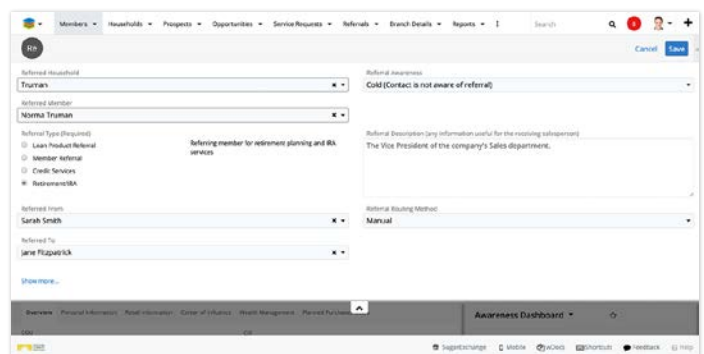
Features

Create Internal Referrals



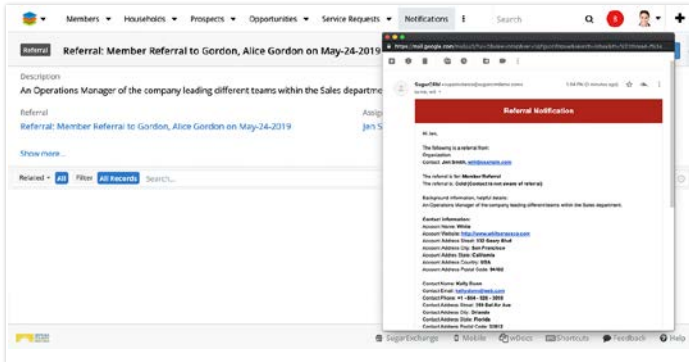
wReferrals enables you to refer records internally, from one Sugar user to another. Any internal referral automatically links to the record's Account and Contact, so the receiver has immediate access to it when receiving the referral notification.

Send External Referrals



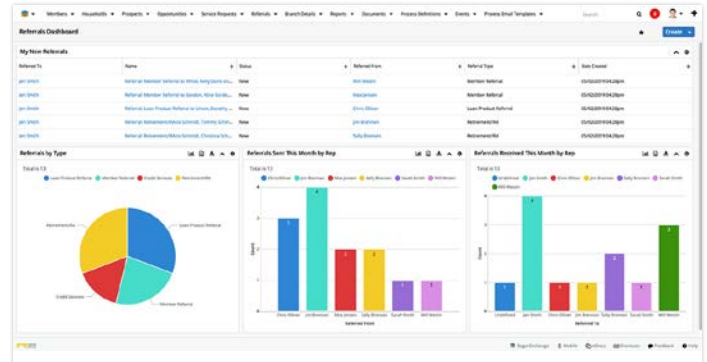
External referrals made are sent to sources outside of your Sugar instance. When created, an email notification is sent to the receiver. You can also include URLs to the records in Sugar if the receiver has access to your CRM instance.

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.