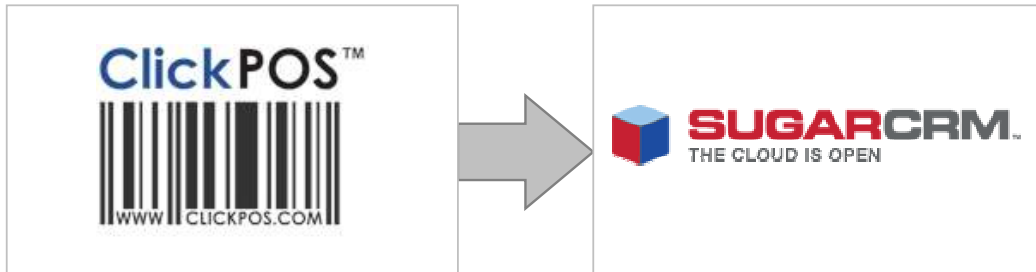


# ClickPOS SugarCRM integration

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Documentation release date	October 2009
By	ClickPOS Pty Ltd
Target	Telecommunications Retail
Available to	Australia and New Zealand
Integration to	SugarCRM

# ClickPOS SugarCRM integration

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This document explains the integration from ClickPOS to SugarCRM. It also highlights the process and the data being integrated between the two systems.

CRM stands for Customer Relationship Management. It is a process or methodology used to learn more about customers' needs and behaviours in order to develop stronger relationships with them. SugarCRM is a web based software that will help bring together lots of pieces of information about your customers, sales, marketing effectiveness, responsiveness and market trends.

This document covers the following

The integration	1
Screen shots	2
Free trial login	3
Pricing	4
How to order	5
Delivery	6



# ClickPOS SugarCRM integration



## Integration of ClickPOS to SugarCRM.

For the telecommunications industry we have implemented many functions. Primary function is to extract data from ClickPOS into the CRM. The information can then be used to further promote new products and most importantly retention of customers.

So we have taken the critical data out of ClickPOS and made it available for various departments within your operation.

## Who should invest in the integrated CRM.

1. Telecommunications retail and Call centres
  - a. Exports list of customers coming off contract into opportunities
  - b. Assign those opportunities to your staff
  - c. View conversion and retention rates
2. B2B – Add leads for B2B customers, your sales reps can keep track of all aspects of customer requirements including quotations and mobile access through your telephone

The following information will be integrated.

Data being transferred.

From ClickPOS		To CRM
Customer details	Updates	Accounts, Contacts
Customer Pipelines	Updates	Opportunities
Pipelines-Expiring Plans	Updates	Opportunities
Accessories, handsets, Plans	Updates	Product Catalogue

# ClickPOS SugarCRM integration



## Screen Shots

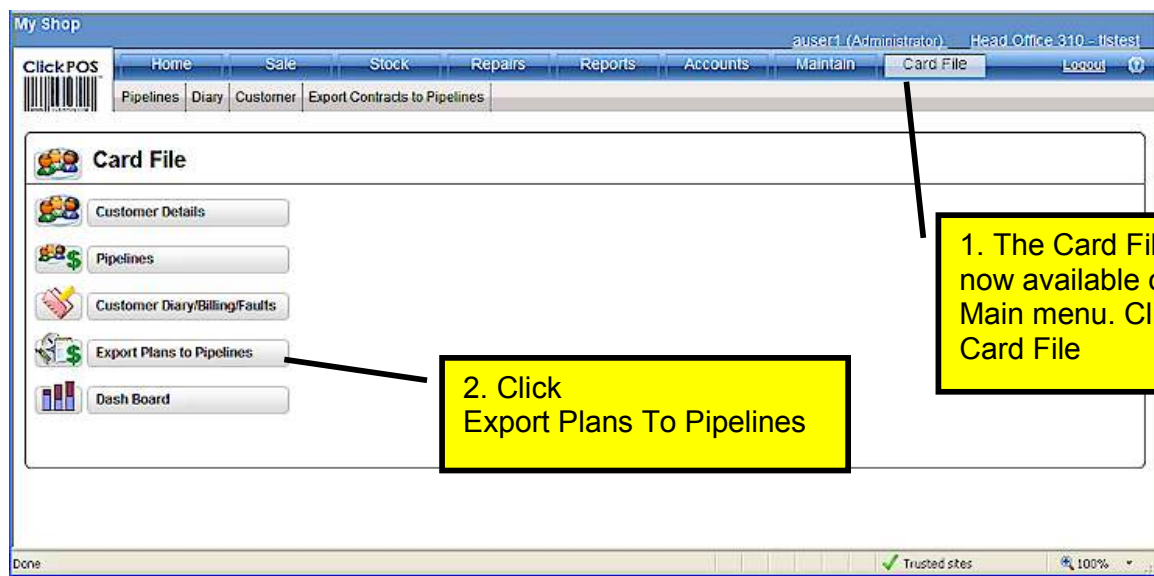
ClickPOS now includes new features to cater for the integration.

### Uploading customer Plan Expiry to CRM

We designed the update of customer plan expiry list so you choose the types of data to upload to CRM.

Some retail may only want to update Business plans and some Consumer, Data products etc. So you choose what you want to export to the CRM.

Here is how to upload customers and plans coming off contract data.



# ClickPOS SugarCRM integration



3. Enter the Contract Expiry date range

4. You can filter the list by entering the Type of Plans to be listed. Eg. Business Plans Then **Search**

5. The results are displayed. Now Tick all or the ones you want to export to the CRM.

6. You can select a status. (The same status must exist in the CRM) then click the OK button. And That's it. The export of all the selected items will now be exported to the CRM systems Opportunities list.

For this exercise we selected the only two Plans.

Business Member 60/24 GSM NEW Head Office A User4	Sam Grey	Contract Only	Telstra GSM 29/11/2009	0435444555	24	79.20
Business Fleet Phone 150/24 Next G NEW Head Office A User5	Sarah Hemmigway	imate JASJAM (Next G)	Telstra Next G 29/11/2009	0403212843	24	198.00

# ClickPOS SugarCRM integration



Now lets have a look at the SugarCRM.  
Login to SugarCRM as an Administrator.

Click in Opportunities

Select	Name	Account Name	Mobile Number	Sales Stage	User	Contract period	Contract end Date	Close	Plan Details	Handset	Amount
<input type="checkbox"/>	Sam Grey		0435444595	OPEN - RESIGN		24	11/29/2009		Business Member 60/24 GSM NEW	Contract Only	\$0.00
<input type="checkbox"/>	Sarah Hamonizwa		0403212843	OPEN - RESIGN		24	11/29/2009		Business Fleet Phone 150/24 Next G NEW	Imole JASJAM (Next G)	\$0.00
<input type="checkbox"/>	Lara Briggs		0412134544								



## ClickPOS SugarCRM integration



Now is the important section..

### Assign the opportunities to individual staff and team.

The team assigned will be responsible in contacting the customer and offer the new products and plans available.

Scroll down the Opportunities list

<input checked="" type="checkbox"/>	<a href="#">Alican</a>	123456789	OPEN - RESIGN		24	10/10/2009	Business Fleet Phone 30/24 Next G NEW	Nokia 6120 Classic (Next G)		\$0.00
<input type="checkbox"/>	<a href="#">Gardening Mate</a>	123	OPEN - RESIGN	Idoit	24	09/12/2009	Consumer Phone 60/24 Next G UPGRADE	Samsung A501 (Next G)		\$0.00
<input type="checkbox"/>	<a href="#">Gardening Mate</a>	123	OPEN - RESIGN		24	09/12/2009	Consumer Phone 60/24 Next G UPGRADE	Samsung A501 (Next G)		\$0.00
<input type="checkbox"/>	<a href="#">Lara Briggs</a>	04121245444	OPEN - RESIGN		24	09/10/2009	Consumer Phone 40/24 Next G NEW	Samsung A501 (Next G)		\$0.00
<input type="checkbox"/>	<a href="#">Lara Briggs</a>	04136555665	OPEN - RESIGN	ouser1	24	09/10/2009	SM Only 0/24 Next G	Sim Card Next G		\$0.00
<input type="checkbox"/>	<a href="#">Natasha Jeffs</a>	04256546555						Contract Only		\$0.00
<input checked="" type="checkbox"/>	<a href="#">Michael Brown</a>	0412111111		Idoit	24	09/31/2009	Business Phone 80/24 Next G NEW	Nokia 6120 Classic (Next G)		\$0.00
<input type="checkbox"/>	<a href="#">Hector Timms</a>	345435345345						Contract Only		\$0.00

Select - Delete Export Merge Duplicates

(1 - 20 of 28)

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**Mass Update**

Assigned to ID:

Type:

Lead Source:

Sales Stage:

Team ID:

Account Name:

Expected Close Date:

Tick the opportunities you wish to assign to the sales reps

Select the reps you wish to assign to, and the Team ID., then click the Update button.

# ClickPOS SugarCRM integration



Now the Sales reps will see the list of customers they need to contact..  
For this example we have logged in as **user1**

The screenshot shows the ClickPOS SugarCRM integration interface. The top navigation bar includes Home, Dashboard, Calendar, Activities, Emails, Documents, Contacts, Accounts, Campaigns, Leads, Opportunities, and Projects. The main content area is titled "Opportunities: Home" and features a "Basic Search" and "Advanced Search" section. A yellow callout box with the text "Your Sales reps will now see the new list of opportunities to contact." points to the "Opportunity List" table. The table displays a list of opportunities with columns for Name, Account Name, Mobile Number, Sales Stage, User, Contract period, Contract end Date, Close, Plan Details, Handset, and Amount. The list includes four entries for Sam Gray, Sarah Hammigway, Megan, and Mike Brown, all assigned to user1 and in the "OPEN - RESIGN" sales stage.

Name	Account Name	Mobile Number	Sales Stage	User	Contract period	Contract end Date	Close	Plan Details	Handset	Amount
Sam Gray		0435444555	OPEN - RESIGN	user1	24	29/11/2009		Business Member 9024 GSM NEW	Contract Only	\$0.00
Sarah Hammigway		0403212843	OPEN - RESIGN	user1	24	29/11/2009		Business Fleet Phone 15024 Next G NEW	Imale J&J4M (Next G)	\$0.00
Megan		123456789	OPEN - RESIGN	user1	24	10/10/2009		Business Fleet Phone 30024 Next G NEW	Nokia 6120 Classic (Next G)	\$0.00
Mike Brown		0412111111		user1	24	31/08/2009		Business Phone 8024 Next G NEW	Nokia 6120 Classic (Next G)	\$0.00

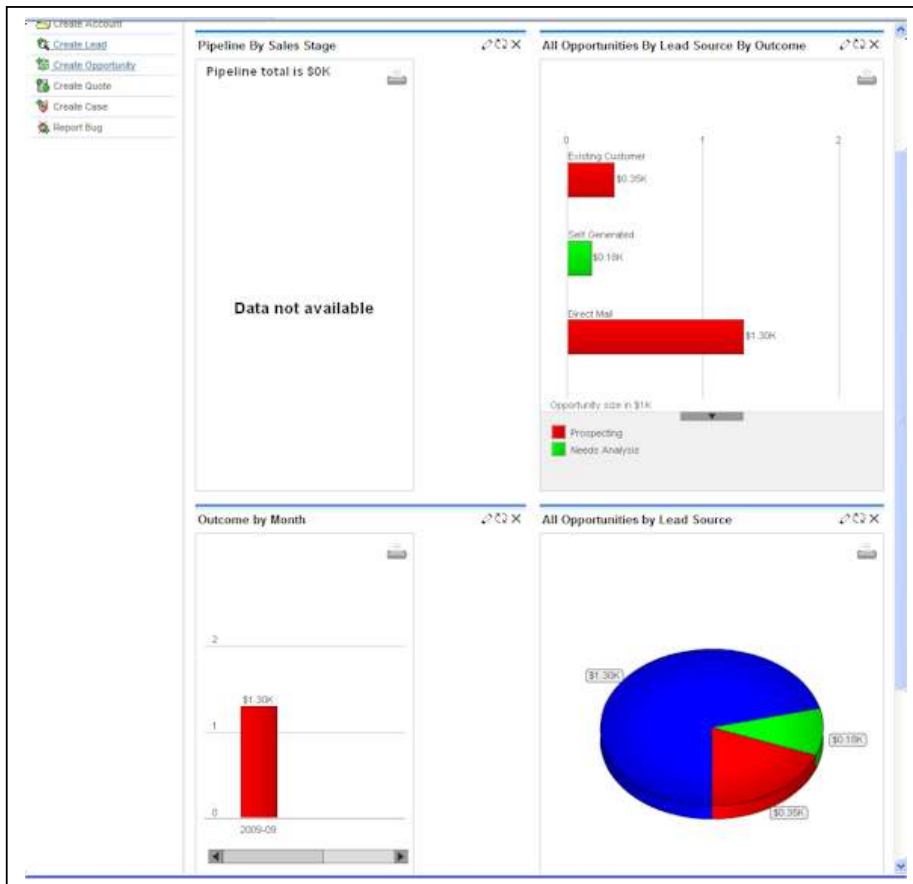


# ClickPOS SugarCRM integration



## Management reporting

There are many predefined reports and graphs that displays “Conversion” statistics.





# ClickPOS SugarCRM integration



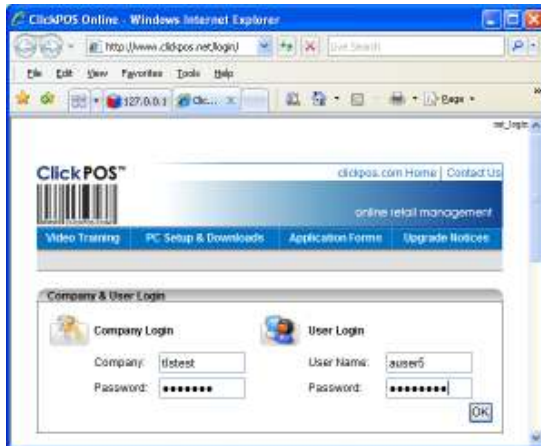
## Free Trial

You can now see full integration from ClickPOS to SugarCRM

### ClickPOS demo site login

[www.clickpos.net/login](http://www.clickpos.net/login)

Company login :   tlstest           User : auser5  
Company pswd:   tlstest           pswd: password  
Select Head office



### SugarCRM login

[http://216.14.207.183/sugarcrm\\_tlstest](http://216.14.207.183/sugarcrm_tlstest)

User Name :       auser1  
Password :       password





# ClickPOS SugarCRM integration



## Pricing

### SugarCRM

- Version – [SugarCRM Professional 5.2](#)
- Minimum 5 user licence @ US\$360 pa per user, (US\$30 per month).
- Additional licences @US\$360 pa

The SugarCRM is based on US\$. The price is dependent on the exchange rate calculated on the day of purchase.

### ClickPOS

- Fees include
  - o Licence fees payable monthly
  - o The Telecommunication specific structure
  - o Basic documentation on ClickPOS integration
  - o Setup on ClickPOS or Sugar hosted servers
  - o Own hosting varies on installation – hourly based
  - o \$990 Setup fee for the telecommunications industry specific implementation.
  - o Any further tailored development/import will be charged at hourly rates.

Fee structure	No. of licences	Per licence	Total
<b>Upfront Fees</b>			
SugarCRM licence fee per user/annum	5	US\$360 (AU\$425 approx)	\$2125 (AU\$ Approx)
Setup fee (ClickPOS)	Once off		\$990
CC transaction fee			
<b>Total Upfront</b>			<b>\$3115</b>
<b>Monthly Fee</b>			
ClickPOS licence fee per user/Month	5	\$33	<b>\$165</b>

## How to Order

You are required to contact ClickPOS to make a purchase of SugarCRM.

We will order the product for you and establish the initial setup, which includes all telco specific fields and setup.

If you order directly from website then you will not have the development and facilities that has been included with the version we are promoting

You are required to fill in an application form, sign and Fax through to our office before your purchase order can be processed. The application form will be forwarded to you upon receiving your interest via email

Please send email to [sales@clickpos.com](mailto:sales@clickpos.com) Or call our office +61 3 9092 5300

## Delivery

Once your order is completed we will start processing your request immediately.