

Get More out of SugarCRM by Using Workflows and Web Services to Streamline Business Processes and to Increase Lead Generation



Get More out of SugarCRM by Using
Workflows and Web Services (and sometimes
Logic Hooks) to Streamline Business Processes
and to Increase Lead Generation

<https://github.com/chadhutchins/sugarcon-2011>

Workflows

Professional

Enterprise

Logic Hooks

Community

Professional

Enterprise

Web Services

Community

Professional

Enterprise

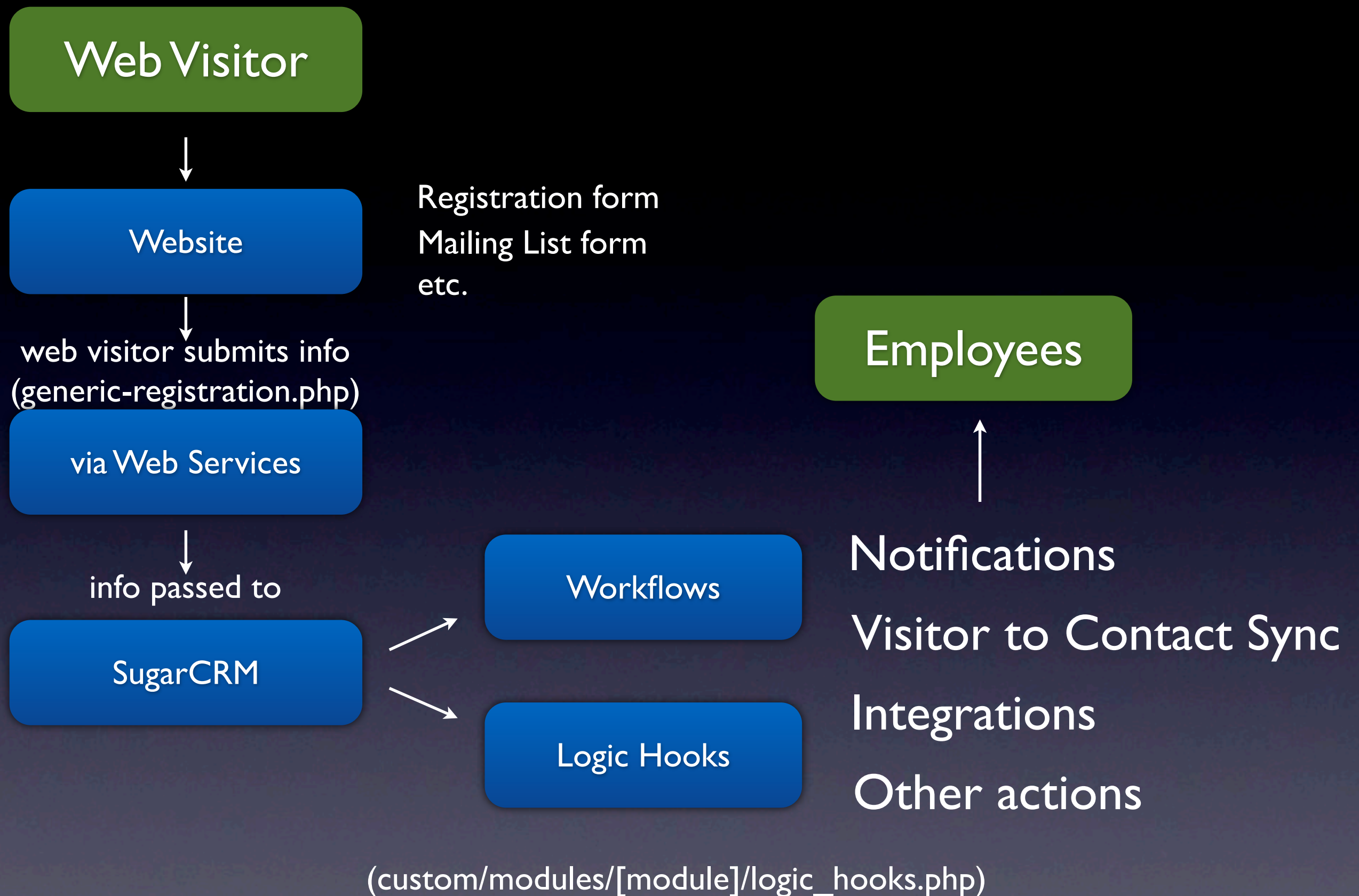
Traditional Lead Forms

Event Registrations

Any type of Sign-up Form

Any process that requires
user info before proceeding

Example



Web-to-Lead Forms

Custom Modules & Forms

Implementing Web-to-Lead Forms

Create Campaign

Create Web-to-Lead Form

Add Form to Webpage

User Experience with Web-to-Lead Forms

Web Visitor goes to the Form

Web Visitor fills out the Form

Form Gets Submitted to SugarCRM

Web Visitor Redirected to Thank You Page

Lead Added to SugarCRM

Notification Emails Sent

Implementing Custom Modules & Forms

Design & Deploy Custom Module

Design the Web Form

Ready the Form Submission Script

Setup Needed Workflows

Implement “Contact Sync” Logic Hook

User Experience with Custom Modules & Forms

Web Visitor goes to the Form

Web Visitor fills out the Form

Form Gets Submitted to SugarCRM

Web Visitor Redirected to Thank You Page

Custom Module Record Added to SugarCRM

Attempts to Sync Web Visitor to a Contact

Notification / Confirmation Emails Sent

<https://github.com/chadhutchins/sugarcon-2011>

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