



Training Document

How Do I ...

End User Training

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Getting Started

1.1 Understand Customer Relationship Management

1.1.1 Introduction

Understanding Customer Relationship Management will help you get the most from your Sugar implementation.

Customer Relationship Management (CRM) is a set of technology-enabled business processes that enable you to create more consistent and profitable interactions with your customers.

1.1.2 What is Customer Relationship Management?

Most companies engage in some form of customer relationship management. When a company builds a customer list, assigns opportunities to sales representatives, or handles customer support cases, they are undertaking CRM-related activities.

CRM applications standardise, automate, and share these activities across organisations to improve how companies interact with their customers.

1.1.3 How Does Your Company Interact with Customers?

Before adopting a CRM application, companies should understand how they interact with customers in order to understand the benefits they can derive from CRM applications. Some questions to ask are:

How do I segment prospects and present them with compelling marketing offers?

Does my sales force effectively manage opportunities and coordinate their sales process across individuals and teams?

How does my support organisation handle customer issues?

Are my employees communicating effectively across teams and departments?

Does my management team have the insight across marketing, sales, and service to make the correct decisions?

1.1.4 Challenges with Customer Interactions

The graphic below illustrates some challenges companies face in key functional areas.

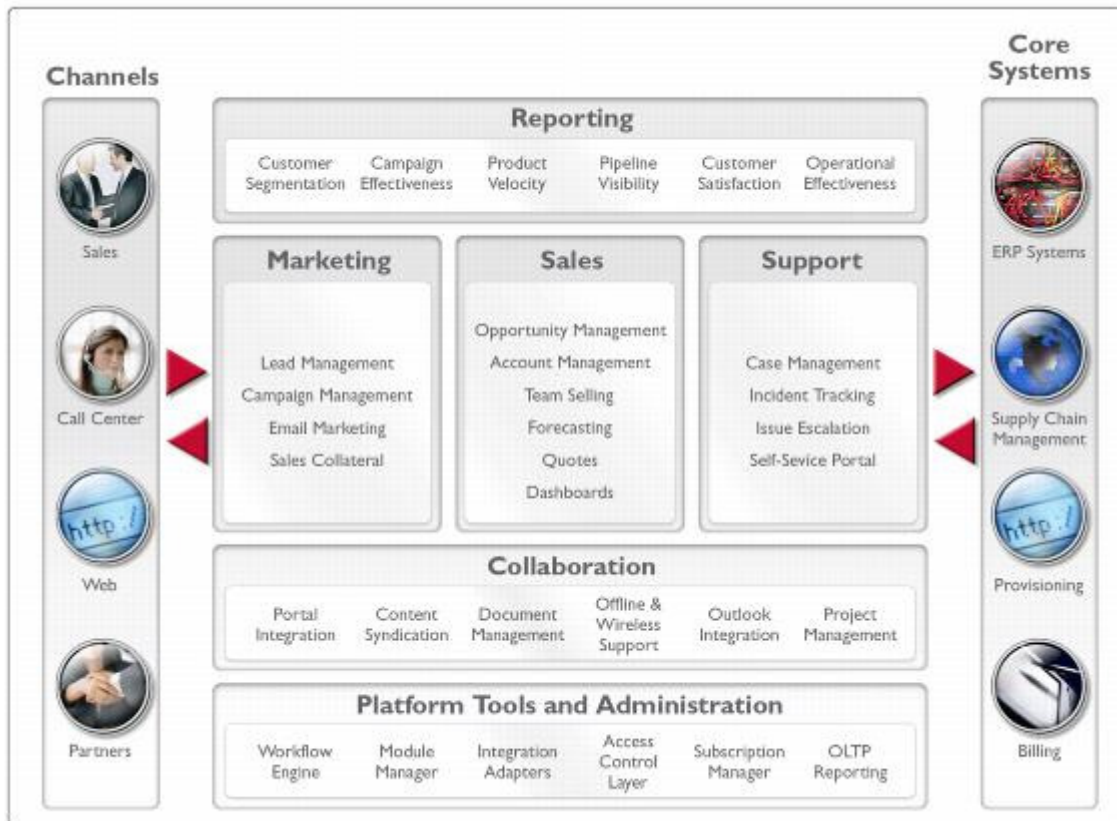


1.1.5 Improving Customer Facing Interaction

CRM applications allow companies to improve customer-facing interactions across various channels; including sales, partner channels, the Web, and call centers.

To accomplish this, CRM systems often tie into other core systems that help to run the business; including accounting, order management, enterprise resource planning (ERP), manufacturing, provisioning and supply chain management systems.

The graphic below shows how CRM can manage important customer-facing functions across channels and systems.



1.1.6 Automating Customer Facing Processes

CRM applications automate certain customer-facing processes and provide solutions around key functional areas to enable companies to interact with customers in a more consistent, structured approach. The solutions are described in the table below.

Functional Area	Description
Sales Force Automation (SFA)	Improves sales performance by allowing sales representative to track and share opportunities, manage and up-sell into existing accounts, coordinate activities across teams, monitor pipeline stages through dashboards, and work offline with mobile solutions.
Customer Support	Improves customer relationships by helping support representatives track customer cases, manage product problems, respond to customer inquiries, and share customer service information across the entire organisation.
Marketing Automation	Allows companies to develop, launch, and track campaigns and other marketing offers to customers. Marketing automation integrates closely with Sales Force Automation to ensure leads are effectively passed between marketing and sales departments.
Collaboration	Improves employee communications by integrating calendars, shared tasks, documents, product information, contracts (Professional and Enterprise editions) and other customer materials in a single location and making them accessible to employees in various departments.
Reporting	Reporting tools capture the activities and business results of different lines of business and presents them to management in a readily understandable set of charts and reports. This provides company leaders with the information they need to make intelligent decisions.

1.1.7 CRM Strategy

CRM applications are an integral piece of the overall customer experience. These systems work best when a clear CRM strategy is in place. Building a true customer-centric organisation requires companies to:

- Establish measurable business goals
- Align business and IT organisations.
- Build executive sponsorship.
- Allow business goals to dictate CRM customisations.
- Solicit end users in product customisations.
- Invest in training for end users.
- Measure, monitor, and track results.

A CRM application should be part of a company's overall business strategy. Business alignment is key to user adoption and business success.

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1.2 Understand Sugar

1.2.1 Introduction

This guide introduces you to Sugar: SugarCRM's leading commercial open source customer relationship management (CRM) application.

1.2.2 What is Sugar?

Sugar is an application that helps companies manage customer relationships across sales, marketing, and service activities.

1.2.3 Single View of Customer Interactions

Sugar provides a single view of all customer interactions; improving sales effectiveness, enhancing marketing activities, and providing improved customer support.

Examples. Sugar capabilities allow companies to:

Develop marketing offers and track the results of multiple campaigns.

Provide salespeople with opportunity and account management capabilities to better manage their sales activities.

Allow customer support representatives to see a customer's history and provide better levels of service through organised tracking of customer issues.

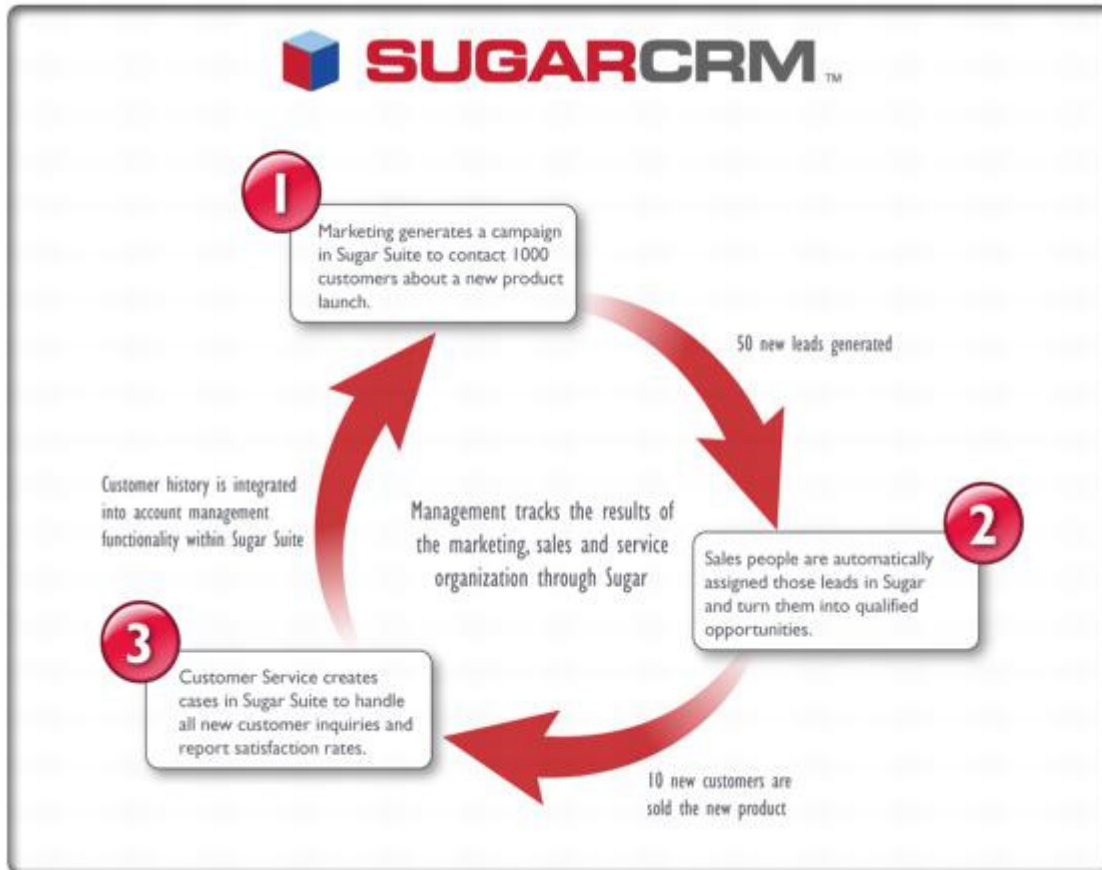
Provide management consistent customer data from their sales, marketing, and customer service teams as well as reporting on various customer related activities.

1.2.4 What Makes Sugar Unique?

SugarCRM leverages the combined talent of CRM experts from around the globe to deliver applications that are of higher quality and offer greater innovation than other CRM vendors. Sugar's source code is available to developers and customers who can modify and customise the application to meet their demands. The result: a user-friendly application that offers a faster return-on-investment than other CRM vendors.

1.2.5 End-to-End Interactions

Sugar enables the end-to-end customer interactions. From generating prospect lists and campaign offers, to generating leads and providing opportunity management for sales people, to tracking and managing customer service cases. Additionally, Sugar provides actionable information to management in the form of reports and dashboards.



1.2.6 Who Uses Sugar?

Sugar supports a variety of functions within an organisation. The table below describes several business functions and how Sugar enables their productivity.

Business Function	Description
Sales	Sales Representatives use Sugar to automate their sales activities, including contacts, opportunities, accounts, pipeline management, and forecasting.
Marketing	Marketing Representatives use Sugar to target prospects, manage prospect lists, develop campaigns, and monitor the results of marketing activities.
Customer Service	Customer Service Representatives use Sugar to manage customer cases, report product problems, and measure customer satisfaction.
Management	Management uses Sugar to analyse how the business is performing across all customer-facing activities.

1.3 Understand SugarCRM's Place in the Marketplace

1.3.1 Introduction

SugarCRM is rethinking how technology can help companies manage customer relationships. The SugarCRM product family, Sugar, delivers a feature-rich set of automated business processes that enhance marketing effectiveness, drive sales performance, improve customer satisfaction, and provide executive insight into business performance. Supported by deep collaboration and administration capabilities that adapt to how companies operate, Sugar is delighting customers of all sizes across a broad range of industries.

1.3.2 Flexible Deployment Options

SugarCRM provides customers maximum flexibility by accommodating customers who may require different deployment options depending on their stage of growth, IT resource availability, and the level of comfort of having a third-party manage their customer information. EnableIT offers SugarCRM commercial products in a hosted UK environment, in a deployment-ready appliance, or downloaded in a pack. Customers can move between these existing deployment options depending on their needs and are not forced to make false deployment choices based on the business model of the software vendor.

1.3.3 Rapid Customisations

Sugar offers point-and-click capabilities for user interface customisation, and for companies who want more detailed customisations, Sugar offers access to the underlying source code. Sugar is written in a simple, popular programming language Hypertext Preprocessor (PHP) that is optimised for the Internet and can be changed rapidly.

1.3.4 High User Adoption

Knowing that CRM success begins with end-user adoption, Sugar is designed to be fast, friendly, and even fun to use.

Accessing Sugar through a web browser, users can choose their own user interface themes to suit their individual tastes, manage multiple information sources through Microsoft Outlook integration, and access the information they need as fast as they can click. Ease of use with the Sugar translates into more organised and efficient sales, marketing, and customer service organisations, which drives greater productivity and more visibility for managers

1.3.5 A Better Way to Build Software

SugarCRM changes the game by finding a better way to develop and deliver software.

Sugar Open Source is authored and released to a community of thousands of CRM experts and developers who use the software, provide feedback, and develop extensions and complements to Sugar. Sugar Open Source is designed to work most effectively for teams of 10 or less. For companies with more advanced needs, SugarCRM sells Sugar Professional and Sugar Enterprise. Revenues from customers of SugarCRM's commercial editions are then used to fund the development and release of new functionality of Sugar Open Source. This virtuous cycle lowers development costs, delivers software more efficiently to end users and creates a more stable and innovative solution.

1.3.6 Cost-Effective Software

SugarCRM's open source approach to building and marketing software means that SugarCRM does not spend \$.70 of every dollar on sales and marketing activities. While these may be important activities, these investments do not make a higher quality or more innovative product. Since Sugar avoids much of these types of costs, the savings are passed on to customers.

1.3.7 Great Innovation

By nature, open source product development is a Darwinian process, where only the most useful features and products merit the time and attention of the open source community. This "survival of the fittest" approach differs greatly from the development model of proprietary software vendors, where a group of engineers guess and then build features they think users across a variety of businesses, industries, and geographies might want. By contrast, SugarCRM offers a flexible CRM architecture that offers maximum flexibility and captures the feedback of thousands of the world's best developers; leading to more frequent improvements of an application that fits the demands of businesses worldwide.

1.3.8 Better Quality

The Commercial Open Source development process reveals 100 percent of its source code to developers, allowing the open source community to test and fix any problems or bugs within the application - a radical departure from the world of closed vendors. All computer users have experienced the quality problems inherent with proprietary products; whether the all-too-frequent security concerns with Microsoft Windows, or the downright quirkiness of a company's business application. SugarCRM believes that using business applications and software in general does not have to be an unpleasant experience. If software breaks, users should not have to wait for another product development cycle or patch release to fix the problem.

1.3.9 Less Risk

Too many companies have paid too much money and then watched as employees failed to adopt a new CRM system. The problem: people were forced to adapt to the application, not the other way around. The SugarCRM development process places customisation and usability at the forefront. A fun, friendly, and usable application increases user adoption, improves employee productivity and provides the visibility executives need to make their business successful.

1.3.10 Faster Payback

SugarCRM offers lower upfront, implementation, customisation, and maintenance costs than proprietary CRM systems because of the way the software is manufactured. By leveraging the expertise of developers worldwide, we can deliver a better product at lower cost. Thus, customers can measure their return on investment in months, if not weeks; instead of years, or in some cases, never.

Who are EnableIT Technologies

1.3.11 About EnableIT Technologies

EnableIT Technologies provides organisations of all sizes with cost effective business solutions to enable growth through effective customer relationship management. We are based just outside Ipswich, and take pride in delivering locally based, commercial advice and management processes, we give businesses an easily manageable, worldwide perspective on their collaboration with customers, suppliers and associates.

Installation, configuration and customisation of the SugarCRM application has become a core aspect of our business to such an extent that we run this SugarUK site along side our main [EnableIT Technologies](#) site, where we detail our other products and services.

Because we recognise that all organisations, whatever their size, must now compete in a commercial environment, we know that communication, marketing, buying processes, data management, delivery and service are all important for ensuring long-term, profitable success. We advise our clients on the best fit for their organisation both now and looking to the future objectives and strategies.

We build and implement the systems and technology every client needs to build a stable platform from which to direct their operations.

1.3.12 Where EnableIT Technologies fit

- SugarCRM Gold Partner
- SugarCRM Certified Trainers
- SugarCRM Developers
- SugarUK Hosting of Community Edition, Professional and Enterprise
- SugarCRMs oldest Gold partner World Wide (October 2004)
- Currently supporting over 5000 users across SugarCRM platforms
- Complete one stop shop for all SugarCRM UK needs

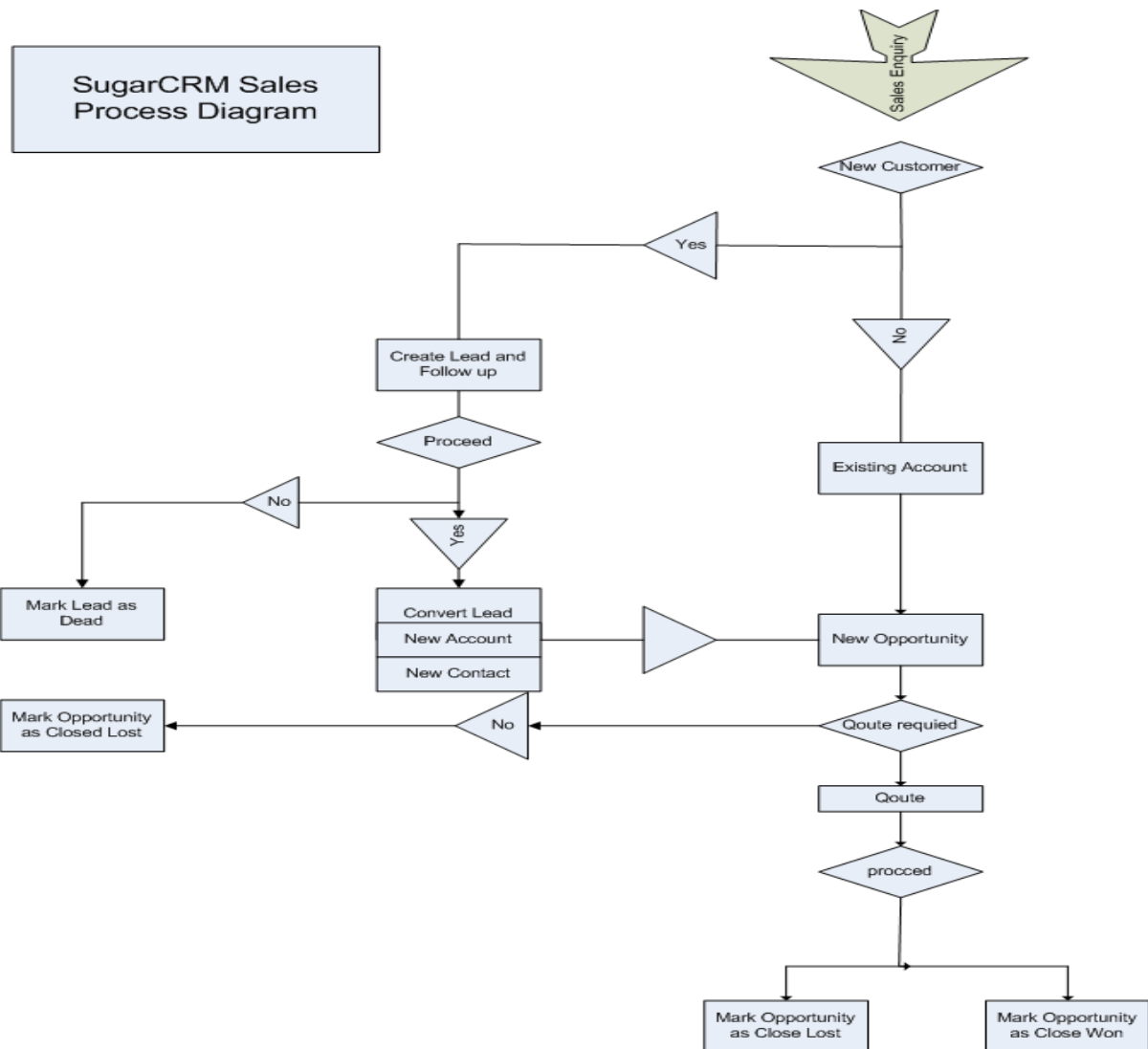
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Sales

1.4 Sales Process



1.5 Create and Manage Leads

1.5.1 Introduction

The Leads module allows you to create, manage, and track leads, or unqualified opportunities, and view all related activities, history and campaigns.

1.5.2 Searching for a Lead

Best Practice: Search for an existing lead before you create a new lead as a best practice to minimise duplicated records. Conduct a search based on your new lead information before creating the new lead.

1.5.3 Creating Leads Overview

Leads can be created from:

The Create Lead, Create From vCard and Import links in the Shortcuts section on the Leads: Home page

The New Lead quick form on the Leads: Home page; enter the basic lead information and click Save

The Create Lead link in the Shortcuts section on the Home module

A Web Form

The Create Lead link in the Accounts and Contacts modules

1.5.4 Creating a New Lead

Follow these steps to create a new lead from the Shortcuts section on the Home module and the Leads: Home page.

Step	Action
1	From the Leads: Home page or the Home module, click Create Lead in the Shortcuts section Result: The Leads edit view appears.
2	In the Lead Information sub-panel, specify the lead source, status, referral information, name, title, phone, and email addresses, department, team and assigned to information. See the table below for details of key fields.
3	Enter the lead's primary address and other address information in the Address Information sub-panel. You can copy information from one section to the other by clicking the arrow buttons.
4	Enter a brief description for the lead in the Description Information sub-panel.
5	Click Save to save the new lead information, or Cancel to exit the record without saving the information. Result: The information is saved and the Leads detail view appears.

Field	Description
Lead Source	Select the lead source from the drop-down.
Status	<p>Select the status of the lead from the drop-down:</p> <p><i>New:</i> Unassigned, new lead</p> <p><i>Assigned:</i> Newly assigned to user</p> <p><i>In Process:</i> Active, being worked on</p> <p><i>Converted:</i> This field is changed automatically by the system; the status appears as converted after the Convert Lead link has been selected. Important: This should never be selected manually.</p> <p><i>Recycled:</i> No opportunity at this time, lead should recycle to marketing for future follow-up</p> <p><i>Dead:</i> No opportunity and/or bad data</p> <p>Note: Status field options can be modified by your system administrator. Please follow the lead status practices set forth by your company.</p> <p>Sys Admin: Do not remove the Converted status from this drop-down as the system relies on its existence.</p>
Email Opt Out	Check this box to add the lead name to the "Email Opt Out" list. This is to ensure the lead is not contacted via email during campaigns.
Invalid Email	Select this box if the email address is invalid.
Department	Enter the department to which the lead belongs within their organisation.
Do Not Call	Check this box to add the lead name to the Do Not Call list. This is to ensure the lead is not contacted via telephone during campaigns.
Team	<p>Enter the name of the team that is allowed to view the lead. To ensure record visibility, the Assigned To must reside on the team selected.</p> <p>Note: The Team field is available with Sugar Professional and Sugar Enterprise. Team functionality is not available in Sugar Open Source and all records are viewable by all users.</p>
Assigned To	<p>Enter the name of the individual who is responsible for the lead; the system assigns the creator of the record by default.</p> <p>To choose an existing user:</p> <p>Perform a quick search by typing the user name in the field; if it is an existing name, the system will auto-populate the name, OR</p> <p>Click Select and choose the user from the Users list.</p> <p>Note: The Assigned To user must be a member of the team selected in this sub-panel in order for the assigned user to see it.</p>

1.5.5 Creating a New Lead from the Accounts and Contacts Modules

You can also create a lead from the Accounts and Contacts modules in the record detail view in the Leads sub-panel. This is a convenient way to create a lead for an account or contact without leaving the Accounts or Contacts modules.

Step	Action
1	From the Accounts or Contacts detail view in the Leads sub-panel, click Create Lead . <i>Result:</i> A short form of the Lead Information sub-panel appears.
2	In the short form Lead Information sub-panel, specify the lead name, lead source, phone, and email, OR Click Full Form to access the entire Lead Information sub-panel and follow steps 2 - 4 above.
3	Click Save to save the new lead information, or Cancel to exit the record without saving the information. <i>Result:</i> The information is saved and the Accounts or Contacts detail view appears with the new lead record in the Leads sub-panel lead list.

1.5.6 Creating a New Lead From a vCard

You can create a lead by importing contact information from a vCard. Follow these steps to create a new lead from **Create From vCard** on the Leads: Home page in the Shortcuts section.

Step	Action
1	From the Leads: Home page, click Create From vCard in the Shortcuts section. <i>Result:</i> The Leads Import vCard page appears.
2	Click Browse to navigate to the vCard you wish to import from your local file system; in the File Upload dialog box, select the file and click Open .
3	The file path will display; click Import vCard . <i>Result:</i> The Leads detail view appears pre-populated with the vCard information, and with the vCard attached in the Name field.
4	Click Edit to add, change or delete any information in your new lead.
5	Click Save to save the new lead information, or Cancel to exit the page without saving the information.

1.5.7 Creating a Lead from a Web Form

A lead is automatically created when a prospective customer completes and submits a web-to-lead form which is associated with a campaign in Sugar. The information from the form is captured and a new lead is automatically created in Sugar and assigned to a sales rep. The lead will appear on the Leads: Home page in the Lead List with a status of New.

1.5.8 Importing a Lead

Import allows you to create multiple leads at one time by bringing in data from other CRM systems, custom comma delimited files, or custom tab delimited files. To import leads, access the **Import** link in the Shortcuts section on the Leads: Home page and the import wizard will walk you through the process.

Note: Add any required **custom fields** to the module you are importing into before beginning the import process. Your system administrator has the ability to add custom fields.

Step	Action
1	From the Leads: Home page, click Import in the Shortcuts section. Result: The Import Step 1: Select the Source page appears.
2	Select the appropriate data source and click Next. Result: The Import Step 2: Upload Export File page appears.
3	Click Browse to navigate to the file you wish to import from your local file system; in the File Upload dialog box select the file and click Open.
4	The system defaults to a checked Has Header box. If your file does not contain headers, you can un-check this box. Click Next. Result: The Import Step 3: Confirm Fields and Import page appears.
5	Map the database field to the header row by selecting the appropriate field name from the drop-down list. After all of your selections are complete, click the Import Now button located in the lower right corner of the screen. Result: The Import Results page appears with a list of your imported leads. Note: You must map the fields to successfully import data. If you wish to ignore a field, select Do not map this field from the drop-down list.
6	From the Import Results screen you can select: Finished to complete your import You can then conduct a search to locate your new lead(s) and edit, add, or -delete information as needed, OR Undo Last Import to revise or edit your import, OR Import More to continue importing data

1.5.9 Managing Leads Overview

You can manage and track a lead through the lead lifecycle in Sugar. From the Leads: Home page, you can edit and make mass updates to multiple leads. From the Leads detail view you can edit a lead, create activities for a lead, and view related campaigns and history for a lead.

1.5.10 Managing Leads

From the Leads edit view, select the **Edit**, **Duplicate** or **Delete** button to make changes to the record.

Edit: Select Edit to see the edit view and edit the record.

Duplicate: Select Duplicate to make a copy of the existing record to modify.

Delete: Select Delete to remove the record from the module.

-Click **Yes** if you wish to delete the record, OR

-Click **No** if you wish to retain the record and return to the lead detail view.

Note: Your system administrator determines who has privileges to delete records. Please check with your system administrator to confirm your privileges.

1.5.11 Finding Duplicate Leads

Best Practice: Check for duplicate leads as a best practice to eliminate duplicated records.

Find Duplicates allows you to find and eliminate duplicate leads to ensure clean data and reduce wasted time on leads that have already been qualified. The system allows you to merge any duplicated records if needed to keep all relevant information.

1.5.12 Linking Related Records

From the Leads detail view you can link activities, history, and campaigns related to a lead.

Activities: Create a task, schedule a meeting or a call, and compose email for the lead.

History: Create a note or attachment, archive and create emails, and view a summary of all related notes and email for a record.

Campaigns: If a lead is related to a campaign, the Campaigns sub-panel will indicate the campaign it is associated with.

1.5.13 Mass Updates

Update several leads at one time using Mass Updates.

1.6 Convert a Lead

1.6.1 Introduction

In the Leads module, **Convert Lead** allows you to convert a lead to a contact, account, and opportunity; and link the related records and history.

1.6.2 Converting a Lead Overview

The Leads: Convert Leads page allows you to convert a lead to a contact, with the option to create an account, opportunity, and appointment. You also have the option to select an existing account to link to the new contact. When converting a lead, any possible record duplicates will be noted and the system will prompt you to either select the existing record, or continue with creating a new record.

Scenario:

You have met with one of your leads and determined the lead is now an opportunity. From the Leads: Convert Lead page, you can convert this lead to a contact and create a new opportunity. Since the lead's company is already in the database as an account, you can choose the appropriate account name from the Account Search window.

Two new records are created: the lead converts to a contact, the contact is linked to an existing account, and a new opportunity is created and linked to those records.

1.6.3 Converting a Lead to a Contact

You can convert a lead to a contact from the Leads: Home page.

If you are converting a lead to a contact only, complete the **Create Contact** sub-panel.

Step	Action
1	From the Leads: Home page in the Lead list view, click the name of the lead you wish to convert. Result: The Lead detail view appears.
2	Click Convert Lead. Result: Leads: Convert Lead page appears.
3	In the Create Contact sub-panel, specify the name, title, department, primary address information, phone, email, lead source and description information. Notes: This information pre-populates if it was previously entered on the Lead Information and Address Information sub-panels. Edit the information as needed. Custom fields with the same name that exist both in the Leads module as well as in the Contacts, Accounts or Opportunities module will also automatically pre-populate from the lead.
4	Click Save . Result: The Leads: Convert Lead page appears confirming the new contact was created with a link to the new record.
5	Click the Created a new contact name link. Result: The Contacts detail view page appears with the new contact information and any related records.

1.6.4 Converting a Lead to an Account and an Opportunity

Follow the steps below to convert a lead to a contact, create a new account or link the contact to an existing account, and then create a new opportunity.

Step	Action
1	Follow steps 1 - 3 above to create a new contact.
2	<p>In the Related Records sub-panel you can either: Check the Create Account box and specify the Account Name, Phone, Website and Description in the Create Account fields that appear, OR Un-check the Create Account box and click Select next to the Select Account field and choose the appropriate account name from the Account Search window.</p> <p>-Result: The account name appears in the Select Account box. Note: Information previously entered in the Leads detail view will be transferred to the Create Account fields.</p>
3	<p>If you wish to also create an opportunity record, in the Related Records sub-panel, check the Create Opportunity box and specify the Opportunity Name, Expected Close Date, Sales Stage, Amount, and Description in the Create Opportunity fields.</p> <p>Note: An account must be created or an existing account must be linked to the contact in order to create an opportunity.</p>
4	<p>Click Save.</p> <p>Result: The Leads: Convert Lead page appears confirming the new contact and the opportunity records, and the account record created or existing account used, with a link to each.</p>

1.6.5 Creating an Appointment

You can create an appointment on the Leads: Convert Lead page in the Related Records sub-panel while converting a lead. The appointment options are a call or a meeting. Appointment details will appear in the Activities sub-panel of the Contacts detail view.

Step	Action
1	Check Create Appointment and specify whether the appointment is a call or a meeting, and specify the subject, date, time, and description.
2	Click Save and the appointment will be confirmed on the Leads: Convert Lead page.

1.6.6 Creating a Note or Attachment

You can click **Create Note or Attachment** in the Create Contact and Related Records sub-panels to add comments and attach files to the new contact, account, or opportunity. The note and attachment will be linked to the record and will appear in the History sub-panel of the record detail view.

1.7 Create and Manage Opportunities

1.7.1 Introduction

The Opportunities module allows you to create and manage sales opportunities, or qualified leads, and view all related records. The opportunities module is highly customisable and your system administrator will define business processes and workflows to suit your company's requirements.

1.7.2 Searching for an Opportunity and Related Accounts

Best Practice. Search for an existing opportunity and account before you create a new opportunity as a best practice to minimize duplicated records. Each opportunity is related to an account, and multiple opportunities can be related to the same account. Conduct a search based on your new opportunity and new or existing account information before creating the new opportunity.

1.7.3 Creating Opportunities Overview

Opportunities can be created from:

The **Create Opportunity** link in the Shortcuts section on the Home module and the Opportunities: Home page.

The **Create Opportunity** quick form on the Opportunities: Home page; enter the basic opportunity information and click Save.

The **Create Opportunity from Quote** button in the Quotes detail view.

The **Create** button in Opportunity sub-panels within Account and Contact records.

The **Convert Lead** button in the Leads detail view.

1.7.4 Creating a New Opportunity

Follow these steps to create an Opportunity from the Shortcuts section on the Home module and the Opportunities: Home page.

Step	Action
1	From the Opportunities: Home page or the Home module, click Create Opportunity in the Shortcuts section Result: The Opportunities page appears.
2	On the Opportunities page, specify the Opportunity Name, Type, Lead Source, Team, and Assigned To, Currency, Dollar Amount, Expected Close Date, Next Step, Sales Stage, Probability (%), and Description. See the table below for details of key fields. Note: Your organisation may have customised these fields to fit your sales process.
3	In the Account Name field: Click Select next to the Account Name field and choose the appropriate account name from the Account Search window, OR Click Select next to the Account Name field and then select Create Account -Specify the Account Name, Phone, and Website Select Save to save the new account information, or Cancel to exit the Create Account section without saving the information. Note: An account must be selected or created in order to create a new opportunity.

4	Click Save to save the new opportunity information, or Cancel to exit the record without saving the information. Result: The information is saved and the Opportunities detail view appears.
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Field	Description
Opportunity Name	Enter a name for the opportunity.
Account Name	This is a required field and must be completed in order to create an opportunity. Select the name of the account related to the opportunity. You can choose an existing account or create a new account.
Team	Enter the name of the team that is allowed to view the opportunity information. To ensure record visibility, the Assigned To must reside on the team selected. The system automatically sets record visibility of a new opportunity to the creator of the record. Note: The Team field is available with Sugar Professional and Sugar Enterprise. Team functionality is not available in Sugar Open Source and all records are viewable by all users.
Assigned To	Enter the name of the individual who is responsible for the opportunity; the system assigns the creator of the record by default. To choose an existing user: Perform a quick search by typing the user name in the field; if it is an existing name, the system will auto-populate the name, OR Click Select and choose the user from the Users list. Notes: When an opportunity is assigned to someone other than the logged in user, the new owner will receive an email notification with the new opportunity details. The Assigned To user must be a member of the team selected in this sub-panel in order for the assigned user to see it.
Next Step	Enter the next step in closing the sale.
Sales Stage	Choose the current stage of this opportunity from the drop-down list. The selected Sales Stage determines the default value displayed in the Probability field. Notes: The Sales Stage drop-down list can be modified by your system administrator to fit your sales process. A graph summary of your opportunities by stage is accessible on the Home module in the My Pipeline view. Additional graph summaries are available within the Dashboard -module.
Probability (%)	Enter a percentage that represents your chance of closing the sale. Note: This field will default to the value associated to the chosen Sales Stage, but can be changed manually. Please follow the probability practices set forth by your company.

1.7.5 Creating an Opportunity from the Quotes and Leads modules

You can also create an opportunity from:

The Quotes module in the Quotes detail view; select Create Opportunity from Quote. This allows you to create a quote before you create an opportunity. Once the opportunity is created, the records will be linked, OR

The Leads module in the Leads detail view; select **Convert Lead**. This allows you to create an opportunity and link to the contact and account records that are created during the Convert Lead process.

1.7.6 Managing Opportunities Overview

From the Opportunities: Home page, you can update several opportunity records at once, as well as quickly link into the Edit view. From the opportunity detail view you can create and link activities, contacts, quotes, projects, contracts, and threads for an opportunity. And from the edit view, you can edit the opportunity details.

1.7.7 Managing Opportunities

The Opportunities edit view allows you to make changes to the record by selecting the Edit, Duplicate, or Delete buttons.

Edit: Select Edit to see the edit view and edit the record.

Duplicate: Select Duplicate to make a copy of the existing record to modify.

Delete: Select Delete to remove the record from the module.

-Click **Yes** if you wish to delete the record, OR

-Click **No** if you wish to retain the record and return to the opportunity detail view.

Note: Your system administrator determines who has privileges to view, edit and delete records.

Please check with your system administrator to confirm your privileges.

1.7.8 Linking Related Records

From the Opportunities detail view you can access sub-panels which include Activities, History, Leads, Contacts, Quotes, Projects, Contracts, and Threads.

You can add contacts, invite them to meetings, print out a summary of archived notes and activities for the meeting, and create quotes and contracts, all from the Opportunities sub-panels.

Records created from the sub-panels are automatically linked to the Opportunity; access them on one page, the Opportunities detail view.

Sub-panels are grouped by tabs and you can view all sub-panels or a specific group of sub-panels by selecting the appropriate tab. This allows you to see only sub-groups needed at the moment such as Sales related sub-panels for Activities, History, and Contacts only.

1.7.9 Mass Updates

Update several opportunities at one time using Mass Updates.

Marketing

1.8 Create an Email Campaign

1.8.1 Introduction

You can create many types of marketing campaigns such as Email, Mail, Web, Radio, Television, Print, and Telesales.

This guide covers how to create an email campaign with the campaign wizard.

1.8.2 Campaign Types

Newsletter: A recurring email campaign with predefined frequencies and predefined target list with options to subscribe and unsubscribe from a web portal.

Email Campaign: When you create an Email campaign, you can execute it through Sugar and view statistics to measure its success.

Non-email based Campaign: When you create other types of campaigns that cannot be executed through Sugar, such as Mail or Radio, you can create a record for your reference.

Note: Before you create an email campaign, check with your system administrator to ensure that the outbound email process is configured to send email.

1.8.3 Creating an Email Marketing Campaign

Creating an email marketing campaign through the wizard walks you through the steps for creating a campaign, adding budget, creating and linking tracker URLs and target lists, as well as defining the email to send out and executing the campaign.

Note: If you step outside the wizard prior to saving, you will lose your campaign data.

Step	Action
1	On the Campaign module, Shortcuts section, select Campaign Wizard.
2	Select Email from the Campaign Type screen, then click Start to launch the wizard.
3	On the Campaign Header screen complete the fields to identify the campaign as described in the Campaign Header Field/Description table below, then click Next to enter budget information. Note: The Start Date, End Date, and Status values are for your records only. These values do not impact the execution of an email marketing campaign.
4	On the Campaign Budget screen enter budget and revenue details in order to track the campaign return on investment (ROI) as described in the Campaign Budget Field/Description table below, then click Next to enter Tracker URL information.
5	On the Campaign Tracker URLs screen, enter the tracker URL details in order to track the number of click-thrus for your campaign as described in the Campaign Tracker URLs Field/Description table below, then click Next to enter Target information. For further details on creating Tracker URLs see How Do I ... Create and Embed Tracker URLs.
6	On the Target Lists screen select or create target list(s) for use with your campaign.

	<p>To use an existing target list: click Select. To create a new target list enter the name and type of target list and then click Create.</p> <p>The target list(s) appears under the Target List Name below.</p> <p>For further details on creating target lists and targets, see How Do I ... Create Target Lists and Targets.</p> <p>Click either Save and Continue to move to the Marketing Email screen, OR click Finish to view a summary of the campaign and enter the marketing email information at a later time.</p>
7	<p>On the Marketing Email screen select or create the email template you will use to send to your target list(s) and complete the fields as described in the Marketing Email Fields/Description table below.</p> <p>You can edit a previously created template to embed tracker URLs.</p> <p>For further details on creating and editing email templates, see How Do I ... Create Email Templates.</p> <p>Click Next to send the email.</p>
8	<p>On the Send Email screen choose Finish, Send Marketing Email As Test, or Schedule Email, depending on whether you wish to send out a test, schedule your email to be sent, or simply to save your work and go to the summary. Click Finish. The campaign summary appears.</p>
9	<p>On the campaign summary screen you can edit the campaign, view the status and view the campaign return on investment.</p> <p>For further details on managing campaigns, see How Do I ... Manage Campaigns.</p>
10	<p>In the Marketing Email section of the summary page you can send tests and schedule the email, as well as create a new marketing email to add to the campaign.</p> <p>Note: Prior to sending the email, run the campaign diagnostics. For further details on campaign diagnostics, see How Do I ... Run Campaign Diagnostics.</p>
11	<p>To send the test emails, click the Send Test button above the detail view. Select the marketing email record you created above and click Send. After a moment, the Status page appears with the messages sent.</p> <p>Important: You MUST have a test target list for the test emails to be sent out.</p>
12	<p>To execute the campaign First change the email marketing record status to Active. Then, click the Send Emails button above the detail view.</p> <p>Select the marketing email record you created above and click Send. After a moment, the Status page appears with the messages sent.</p> <p>Note: The start date, start time, and status selected in the email marketing screen determine when the email is sent.</p> <p>Important: Ensure that you have worked with your Sugar Administrator to schedule a job to send out the campaign emails.</p>

1.8.4 Campaign Header Fields

Field	Description
Name	Enter the campaign name.
Status	From the drop-down list, select the current status of the campaign. The status must be changed manually as the campaign progresses. Select from the following: Planning: The campaign is in development and is not ready to execute. Active: The campaign components are lined up and the campaign is ready to be executed. Inactive: You do not want to execute the campaign at this time. Complete: Once the results have been received, change the campaign status to complete. In Queue: The campaign is waiting to be executed. Sending: The campaign emails are in the process of being sent out when sending the emails out in several batches.
Start Date	Click the Calendar icon and select the date on which the campaign begins.
End Date	Click the Calendar icon and select the date on which the campaign ends.
Assigned to	Enter the name of the user assigned to the campaign; to choose a user from the Users list, click Select, and click the user name.
Team	Enter the name of the team that is allowed to view the campaign information; to choose a team from the Teams list, click Select, and click the team name. <i>Note:</i> Teams are available in Sugar Professional and Sugar Enterprise.
Type	The type selected in Step 2 above will appear, for email campaigns, email will appear.
Description	Enter a brief description of the campaign.

1.8.5 Campaign Budget Fields

Field	Description
Budget	Enter the budget for the campaign.
Expected Revenue	Enter the estimated revenue from the campaign.
Currency	Select the currency type for the campaign.
Actual Cost	Enter the actual cost incurred to conduct the campaign.
Expected Cost	Enter the estimated cost of the campaign.
Impressions	The number of people who opened the email.
Objective	Explain the goal of the campaign.

1.8.6 Campaign Tracker URL Fields

Field	Description
Tracker Name	Enter a tracker name for your reference; use alpha-numeric characters. <i>Example:</i> Register Now!
Tracker URL	Enter the tracker URL and click Create Tracker. To create additional tracker URLs, click Create Tracker again. <i>Example:</i> http://www.e-nableit.com <i>Note:</i> You must include the http:// at the beginning of the link.
Opt-out Link?	Select this box to identify the tracker URL as an opt-out link and embed your "Unsubscribe" instructions in a tracker URL. By default, the system uses the <i>removeme.php</i> file which contains these instructions, and displays this file name in the Tracker URL field. <i>Note:</i> If you do not select the Opt-out link option, then the system inserts the default opt-out link. So, if you do not want to include an Opt-out link in your campaign message, select the Opt-out option but do not insert the link in the campaign message.

1.8.7 Marketing Email Fields

Field	Description
Name	Enter a name for the marketing email.
Use Mailbox	From the drop-down list, select a mailbox that is set up for BounceHandling. The mail box name appears in the From Name field by default and can be changed. <i>Note:</i> This mailbox needs to be already set up by the Sugar Administrator.
Status	From the drop-down list, select Active if the record is in use; select Inactive if the record is not in use. Only active records will be queued for campaign launch. <i>Important:</i> Always set the status to Inactive while in development and testing. The status must be set to Active for the campaign to be executed.
From Name	Enter the name of the organisation or person that is sending out the email.
Start Date & Time	Click the calendar icon and select a date to send out the email. Enter the time in the adjoining field. <i>Note:</i> To queue the email for campaign launch, select a date and time that has already passed; only after you ensure that the test email was successful.
Email Template	From the drop-down list, select an existing email template; to create a new template or edit an existing one, click the adjoining Create or Edit link respectively.
Send This Message to	Select one or more target lists from the box below; to send it to all the target lists in the box, select the All Target Lists in the Campaign box.

1.9 Run Campaign Diagnostics

1.9.1 Introduction

Executing an email campaign or a newsletter campaign involves several steps, some of which can be performed only by your administrator. The campaign diagnostic tool enables you to check if all pending administrative tasks have been completed before you attempt to launch the campaign.

1.9.2 Running Diagnostics

To run campaign diagnostics follow these steps.

Step	Action
1	In the Shortcuts section of the Campaigns module, click Diagnostics . The Campaign Diagnostics page displays. If the email settings and a bounce-handling inbox have not been configured, warning messages display on this page. Contact your administrator to complete these tasks.
2	To perform the diagnostics again, click Re-Check .

1.10 Manage Campaigns

1.10.1 Introduction

After you create a campaign, you can edit the campaign, as well as view the campaign status.

Once the campaign is completed, you can also view the return on investment (ROI) details for the campaign.

1.10.2 Editing the Campaign

From the campaign detail view, you can do the following:

To edit the campaign information, lick **Edit**.

To duplicate the campaign information click **Duplicate**.

Duplication is a convenient way of creating a similar campaign. You can change the information in the duplicate record to create a new campaign.

To delete a campaign click **Delete**.

To test a campaign email before sending it out, click **Send Test** and on the Campaign Send page, select the message and click **Send**.

To queue emails for campaign launch, click **Send Emails**, and on the Campaign Send page, select the message and click **Send**.

To track changes to a campaign over time click the **View Change Log** link.

1.10.3 Viewing Campaign Status

The campaign status information includes the following:

A chart displaying the campaign response by recipient activity, including campaign statistics such as messages sent and messages that bounced.

- How many emails were sent out and how many are still in the email queue.
- How many targets viewed the email.
- How many targets clicked the embedded URL links.
- How many targets were converted into leads or contacts.
- How many emails bounced back due to invalid email addresses or other reasons.
- How many targets chose to opt-out of your target list.

Step	Action
1	To view a campaign's statistics, click the View Status link located below the Print icon on the Campaign detail page. The system displays a chart representing information such as the numbers of messages that were sent and the number of bounced messages. Clicking on a section in the chart will bring you to the details displayed in the appropriate sub-panel. Sub-panels for related information such as the targets who viewed the message and the leads that were created display below the chart. <i>Note:</i> Click the Delete Test Entries button to delete log entries created by test runs.
2	To return to the Campaigns home page, click View Details .
3	To launch the campaign wizard, click Launch Wizard .
4	To view the campaign ROI, click View ROI .

1.10.4 Viewing Email Campaign ROI

For any campaign that you execute, Sugar provides an embedded ROI report based on the "Closed/Won" opportunities generated from the campaign.

Step	Action
1	To view a campaign's ROI, click the View ROI link located below the Print icon on the Campaign detail page. The system displays a chart representing information such as revenue, investment, expected revenue and budget. Hover over a section in the chart to see the actual amount. <i>Note:</i> Click the Delete Test Entries button to delete log entries created by test runs.
2	To return to the Campaigns home page, click View Details .
3	To launch the campaign wizard, click Launch Wizard .
4	To view the campaign status, click View Status .

1.11 Create Target Lists and Targets

1.11.1 Introduction

The campaign process includes defining targets and target lists to direct the campaign to.

1.11.2 Target List Process

Once you have determined your campaign criteria and who you want to target, then you will be ready to create a target list and then assign the targets to it.

Usually, you create or import a target list first and then relate it to a campaign. However, you can also create a campaign first and then associate it with a target list.

1.11.3 Definitions and Characteristics

Target: An individual that you have some information on, but does not qualify as a lead or contact.

Target List: Multiple targets grouped together according to a set of predetermined criteria such as age group or spending habits.

While targets are stand-alone records that are not attached to contacts or leads, you can include contact, lead, target, and user records in a target list, as well as a combination of these types.

Example: You may choose to target existing leads that need to be 'nurtured'; run a report with lead criteria and import the report as a target list.

Note: Users can not 'opt-out', so they will not see the appropriate opt-out links in the email.

You can use a target list to specify individuals that you want to include in or exclude from a campaign.

You can add targets to the target list by selecting them from reports in Sugar.

You can also add targets to the target list by importing them from a file (either CSV or TSV) or by selecting them from existing contacts and leads.

1.11.4 Target List Types

When you create a target list, you can specify one of the following types:

Default: A list of people who are the campaign targets and receive the campaign email.

Sugar performs a duplicate check to prevent duplicate emails being sent out to the Default list.

Seed: A list of people who need to receive the campaign email but must not be tracked as potential leads.

Seed is primarily used for internal purposes, to confirm that the campaign has been successfully completed.

Test: A list of people who will receive a campaign email to test it before it is sent out to the default list.

Test provides no duplicate check.

Suppression List: A list of people you want excluded from the campaign email recipient list.

Suppression lists can be by ID, email address, or domain.

Do not add suppression list for testing

Notes:

Test and seed lists are ignored in email tracking statistics.

Users included on test and suppression lists will not receive the executed email.

1.11.5 Creating a Target List

Follow these steps to create a target list.

Step	Action
1	From the Shortcuts section on the Campaigns Home page, click Create Target List .
2	On the Target Lists page, enter the target list information. See the Field/Description table below for full details.
3	Click Save to save the target list; click Cancel to exit the page without creating the list. Result: the Target List: Target <Name> page appears.

Field	Description
Name	Enter a name for the target list.
Type	From the drop-down list, select the target list type. See Target List Types section above for details.
Assigned to	Enter the name of the user assigned to this list; click Select to select from the User list. By default, it is assigned to you.
Team	Enter the name of the team assigned to this list; click Select to select from the Team list. By default, it is assigned to you. <i>Note:</i> Teams are available in Sugar Professional and Sugar Enterprise.
Description	Enter a brief description of the target list.

1.11.6 Adding Targets to a Target List

Once the target list record is created, you can add target, contact, lead, and user records to the target list.

From the appropriate sub-panel, click **Select** or **Select from Reports** to add the target records, which will appear in the sub-panel.

Select: A new window with the list view of the records appears. Select the appropriate records and click **Select**.

Select from Reports: A new window with the list of reports related to the record type appears. Select the appropriate report and click **Select**.

Note: Select from Reports is available in Sugar Professional and Sugar Enterprise only.

1.11.7 Creating a Target

While you will generally purchase target lists and/or select targets from within Sugar, you can also manually create new target records.

Targets are stand-alone records that are not attached to contacts or leads. If you plan to send email campaigns to existing contacts or leads, you will add them to your target lists.

To create a target record in Sugar, follow these steps.

Step	Action
1	On the Campaign Home page, in the Shortcuts section, click Create Target .
2	On the Targets page, enter information for the fields as needed. The majority of the fields are self explanatory. For information on some of the fields, see the Field/Description table below.
3	Click Save to save the target list; click Cancel to exit the page without creating the list.

Field	Description
Email Opt Out	When you select this box, if the target clicks the "Unsubscribe" URL to opt-out of receiving your campaign emails, the system will display email address in the Opted Out sub-panel of the campaign's Status page.
Invalid Email	When you select this box, if the email bounces back because the address was incorrect, the system will display it in the Bounced Messages, Invalid Email sub-panel of the campaign's Status page.
Do Not Call	Select this box to add the target's name to the Do Not Call list.
Team	Select the team that is allowed to view the account related to the target. <i>Note:</i> Teams are available in Sugar Professional and Sugar Enterprise.

1.12 Create Email Templates

1.12.1 Introduction



You can use email templates to create form letters for individuals, mass email campaigns and email blasts. When you create a template for an email campaign, you can insert tracker URLs into the template to track campaign activity.

1.12.2 Creating Email Templates

Email templates allow you to enter a message in a template, and then specify variables, such as the recipient's name and email address from your account, contact, lead, target or user records. The system inserts these variables into the template to create a personalised email for each recipient. When you create a template, you can embed images and attach files from the Sugar repository or from your local file system.

Step	Action
1	From the Emails or Campaigns modules, Shortcuts section, click Create Email Template .
2	Enter information for the fields as described below.
3	Click Save to create the template; click Cancel to exit the page without saving your changes.

Field	Description
Name	Enter a name for the template.
Team	From the drop-down list, select the team that is allowed to view the template.
Description	Enter a brief description about the template.
Insert Variable	From the drop-down list, select a record such as Contact and a field such as Full Name and click Insert. The system displays the variable in the Body field.
Insert Tracker URL	<p>This field displays only when you create or edit the template from the Email Marketing Record of an Email campaign.</p> <p>From the drop-down list, select the tracker URL to insert and click Insert URL Reference.</p> <p>The Body field displays a link named Default link text.</p> <p>See the description for the Body field below to change this text.</p> <p>To insert the tracker url in your plain text email (see Edit Plain Text below), use the format displayed in the field to the right of the Insert Tracker URL field.</p> <p>Example: {Link to company information}</p>
Subject	Enter the title of the email message.

Body	<p>Enter the email message. You can also embed images and add URL links.</p> <p>HTML Editor Highlight the text and click buttons on the toolbar to apply standard formatting options such as font face, size, bold, italics, indentation and color. Additional buttons insert rules, hyperlinks, pictures, table and display the HTML source code. To view the HTML source text for the Default link text, click HTML in the HTML editor. The HTML source code displays in the Body field as follows: <code>Default link text.</code></p> <p>Edit Tracker URL Links Replace “Default link text” with the message that you want to send out to the campaign recipients. To edit links in an existing template with new URLs, click the desired link and then click the link icon  in the HTML editor. The Insert/edit link window appears. Enter the tracker name in the Link URL field for the new tracker URL Example. {Link to company information} Click the Update button</p> <p>Note: Tracker URL Links can only be inserted and edited from a campaign Email Marketing Record</p> <p>Edit Plain Text Select this box to display the email in plain text format. You can choose this option if an email client cannot render HTML code.</p>
Attachments	<p>You can attach and embed files and images from your local machine as well as from the Sugar repository, or Documents module.</p> <p>Local Machine Click Browse to navigate to its location on your local machine. The attached file name displays below the Browse button with a folder icon.</p> <p>Sugar Document List Click Sugar Document; when you select the file from the Documents List, the system attaches it to the email template. The attached file name displays below the Browse button with a Sugar icon. Note: The Documents module is available in Sugar Professional and Sugar Enterprise.</p> <p>To embed an attached image file: Click the location for the image within the email template. Click the Embed icon  to the left of the file name to insert the image To remove it, click Remove. Note: Embedding images helps prevent emails being blocked as spam.</p>

1.13 Create and Embed Tracker URLs

1.13.1 Introduction

Campaign emails can contain links to direct targets to URLs such as an external Web site or a *.php* file on your system. New tracker URLs must be created for each campaign.

1.13.2 Links Types

- Redirect links:** You can use one or more tracker URLs in your campaign emails to track the response to your campaign. The system generates a unique key for each URL and for each recipient and associates it with the email template. When recipients open the email and click on a URL link, the system, using the unique key identifier, tracks each action by each recipient.
- Unsubscribe Links:** Links can be included to allow targets to unsubscribe themselves from your campaign mailing list. You can embed an “Unsubscribe” link in a tracker URL. When targets click on this URL to unsubscribe from your campaign emails, the system logs the action for your records.

1.13.3 Creating Tracker Redirect Links

To create a tracker redirect link follow these steps.

Step	Action
1	From the Campaign module, select the desired campaign.
2	On the Campaign detail page, scroll down to the Tracker URLs sub-panel, and click Create .
3	On the Campaign Trackers page, enter information for the fields as described in the Field/Description table below.
4	To create the campaign tracker, click Save ; click Cancel to exit the page without saving your changes. You can now insert this tracker URL into an email template of your choice.

Field	Description
Tracker Name	Enter a tracker name for your reference; use alpha-numeric characters. <i>Example:</i> Register Now!
Tracker URL	Enter the tracker URL. <i>Example:</i> http://www.e-nableit.com <i>Note:</i> You must include the http:// at the beginning of the link.
Opt-out Link?	Select this box to identify the tracker URL as an opt-out link and embed your “Unsubscribe” instructions in a tracker URL. By default, the system uses the <i>removeme.php</i> file which contains these instructions, and displays this file name in the Tracker URL field. Note: If you do not select the Opt-out link option, then the system inserts the default opt-out link, as Opt-out links are required by the law.

Comments and Useful Tips.....

Comments and Useful Tips.....

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