

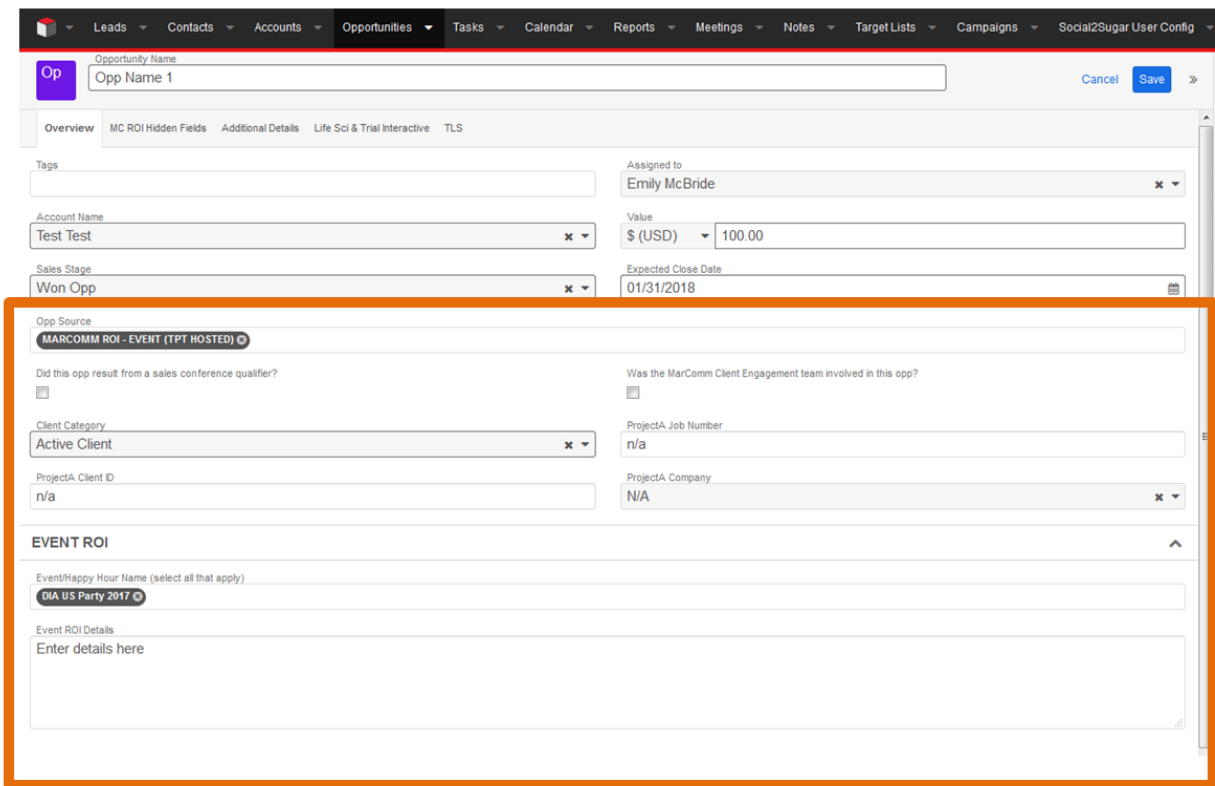
REPORTING ROI IN SUGAR – INSTRUCTIONS

ROI can now be reported in the details of an Opportunity in Sugar. This guide outlines how to:

- Create a new ROI record in Sugar
- Update an ROI record originally created in Sugar
- Update an ROI record originally submitted in BaseCamp

To create a new opportunity and report ROI for it:

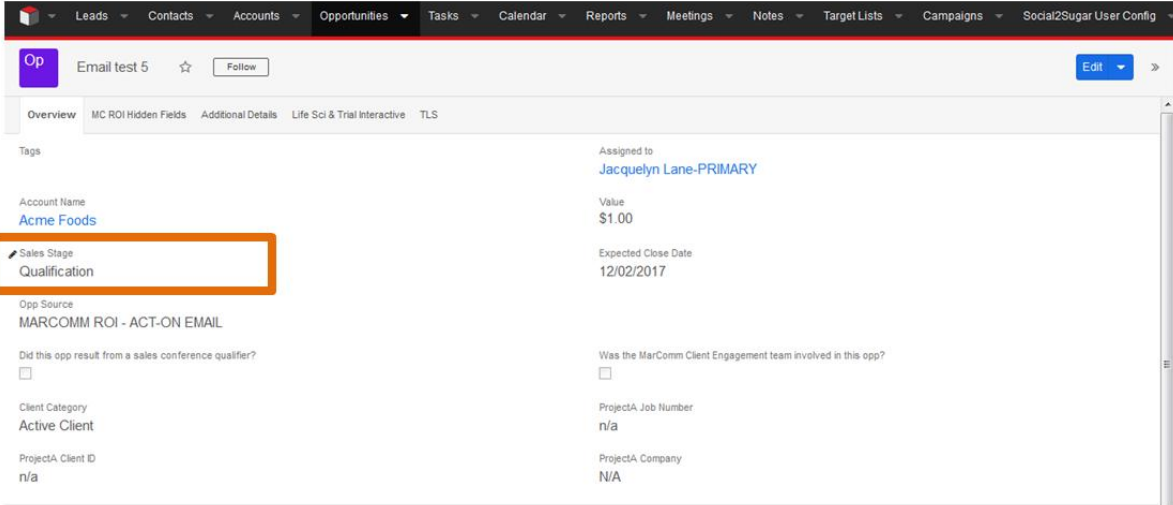
- Log into Sugar
- In the top toolbar, select Opportunities > Create Opportunity
- Input basic required information
(Assigned to, Account Name, Value, Sales Stage, Expected Close Date)
- Under Opp Source, select one of the MARCOMM ROI types
(Act-On Email, Event, Trade Show, Direct Mail, Promo Giveaway, Client Engagement Team, Other)
- Once the ROI Opp Source is selected, conditional fields will appear. Enter as much information as possible.
- Click Save – you are done!
You have just created a new Opportunity with ROI reported.



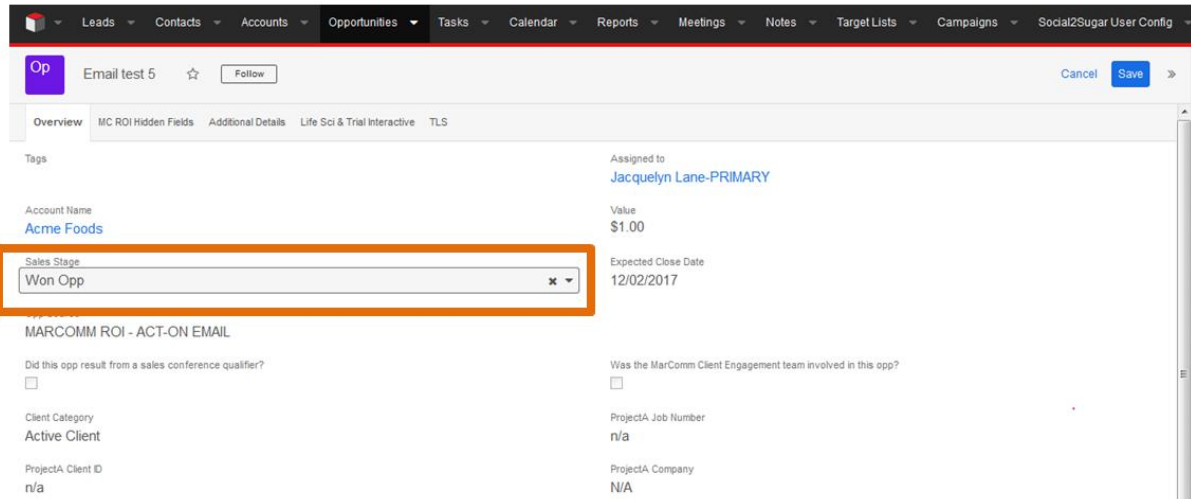
The screenshot displays the Sugar CRM interface for creating a new Opportunity. The top navigation bar includes: Leads, Contacts, Accounts, Opportunities, Tasks, Calendar, Reports, Meetings, Notes, Target Lists, Campaigns, and Social2Sugar User Config. The Opportunity Name field is set to "Opp Name 1". The form is divided into several sections: Overview, MC ROI Hidden Fields, Additional Details, Life Sci & Trial Interactive, and TLS. The Overview section includes fields for Tags, Account Name (Test Test), Sales Stage (Won Opp), Assigned to (Emily McBride), Value (\$ (USD) 100.00), and Expected Close Date (01/31/2018). The Opp Source section is highlighted with an orange box and contains the following fields: Opp Source (MARCMM ROI - EVENT (TPT HOSTED)), Did this opp result from a sales conference qualifier? (checkbox), Was the MarComm Client Engagement team involved in this opp? (checkbox), Client Category (Active Client), ProjectA Job Number (n/a), ProjectA Client ID (n/a), and ProjectA Company (N/A). Below the Opp Source section is the EVENT ROI section, which includes a field for Event/Happy Hour Name (DIA US Party 2017) and a text area for Event ROI Details (Enter details here).

To update an Opportunity already logged in Sugar:

- View Opportunities > Select the Opportunity that needs to be updated
- Click the field that needs to be updated (Sales Stage, etc.) and update
- Click Save – you are done!



The screenshot shows the Sugar CRM interface for an Opportunity record titled "Email test 5". The record is assigned to "Jacquelyn Lane-PRIMARY" and has a value of "\$1.00" and an expected close date of "12/02/2017". The "Sales Stage" field is currently set to "Qualification" and is highlighted with an orange box. Other fields include "Account Name: Acme Foods", "Opp Source: MARCOMM ROI - ACT-ON EMAIL", "Client Category: Active Client", and "ProjectA Client ID: n/a".



The screenshot shows the same Sugar CRM Opportunity record, but the "Sales Stage" field has been updated to "Won Opp" and is highlighted with an orange box. The "Save" button is now visible in the top right corner of the record view. All other fields remain the same as in the previous screenshot.

FAQs

- **Can I report multiple opp sources within one opportunity?**
Yes. The Opp Source field is a multi-select list, allowing you to add unlimited opp sources in any combination.
- **I reported ROI through BaseCamp for a pending opportunity. The opportunity was just won/lost/cancelled, so I would like to update my ROI report. How do I do this?**
Please submit a fresh report in Sugar. If you would like the details of your previous BaseCamp report, email marcommroi@transperfect.com.