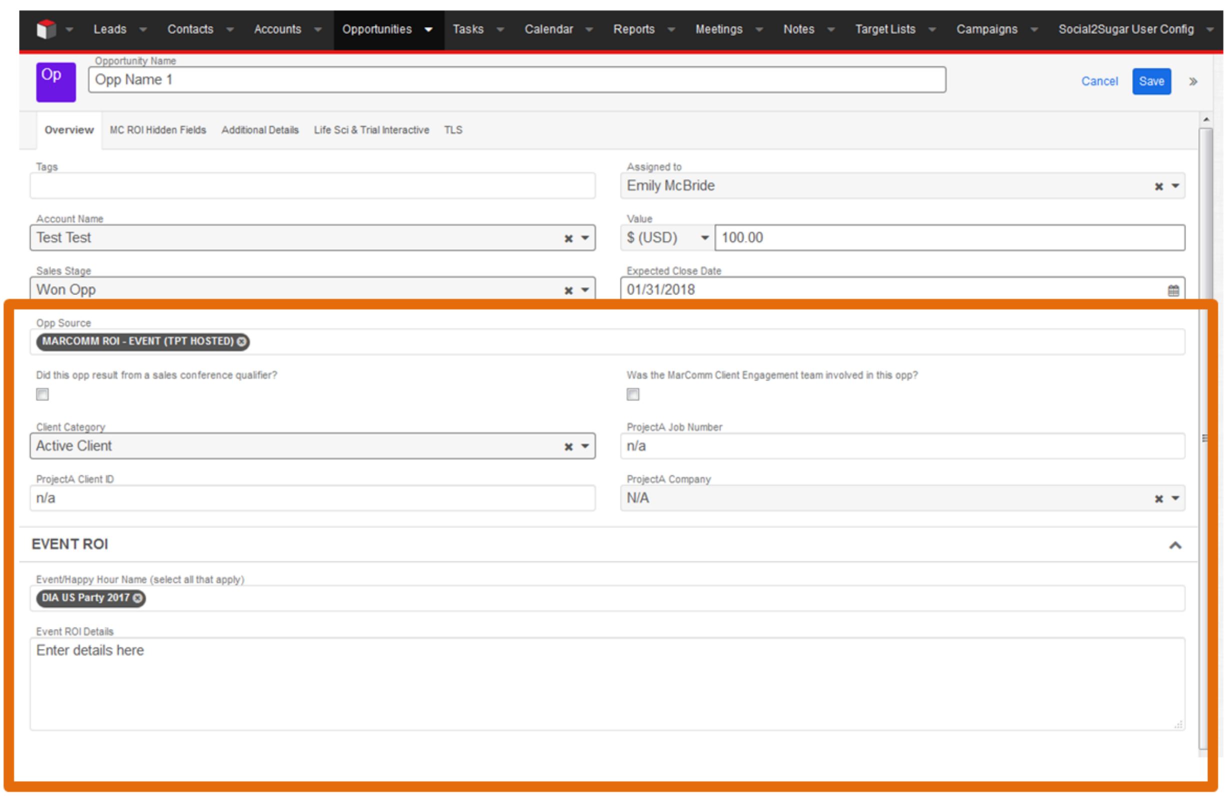
REPORTING ROI IN SUGAR – INSTRUCTIONS

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.



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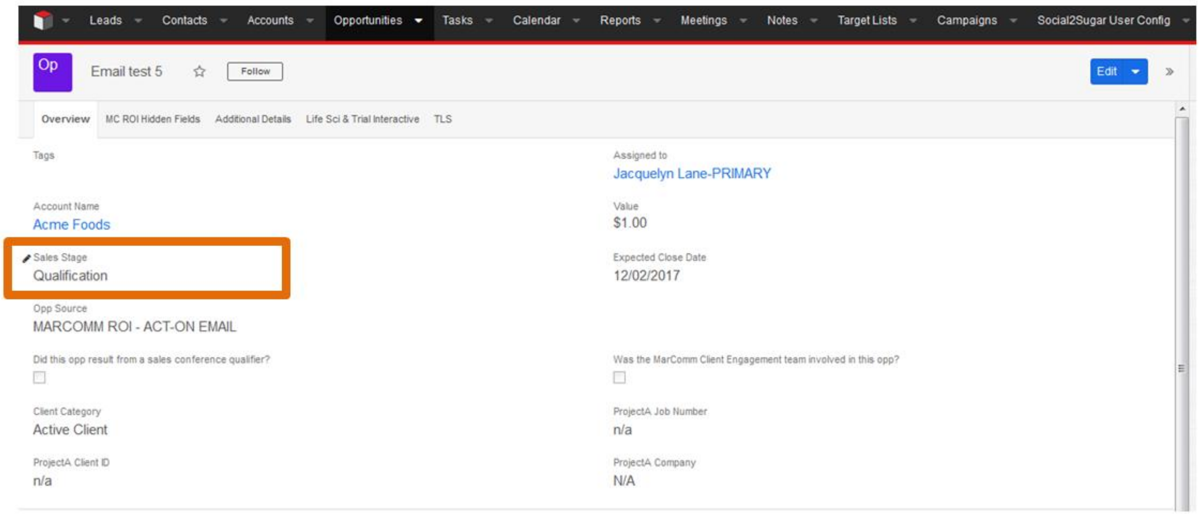
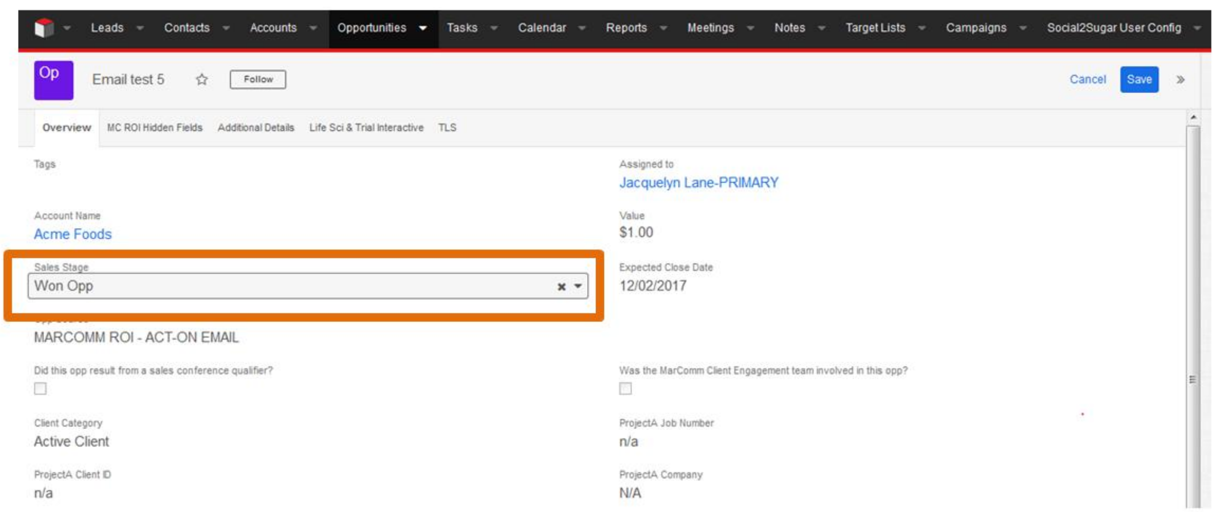
To update an Opportunity already logged in Sugar:

- 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!





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.