



**Course Manual  
Sugar CRM  
SAL-190**

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## I. Overview of Sugar

After completing this chapter, you will be able to...

- Describe the purpose of Sugar and the data contained within Sugar.
- List the similarities and differences between Sugar and ACT.
- Identify the main areas and navigational elements within the Sugar user interface.



### A. Introduction

The introduction of Sugar increases the scalability and flexibility of InterBay's Customer Relationship Management (CRM). Sugar is a web-based application accessing an underlying database of all our companies, contacts and related information.

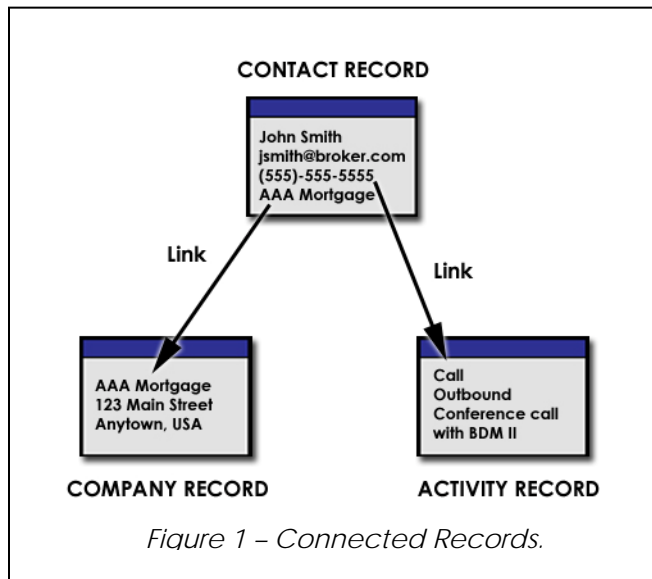
#### Information in Sugar

Sugar allows you to track and manage the following aspects of your client relationships:

- Mailing address
- Phone and fax
- Email addresses
- InterBay events attended
- Loans in progress (via MorVision)

In addition, Sugar tracks each specific activity related to the client relationship including:

- Phone calls
- Sent emails
- BDM visits
- Marketing meetings



Email tracking is limited to typed summaries of emails sent from Sugar. Incoming emails appear in Lotus Notes and are not tracked within Sugar. More information emails is provided in the Activities section of this manual.



## Connected Records

Records in Sugar are referential, meaning they connect to one another. For example, a Company Record, such as "AAA Mortgage" connects to any Contact Records associated with it, such as "John Smith." A Contact Record connects to any Activities associated with it such as "conference call with BDM II." This allows you to instantly drilldown on several levels of detail within a client relationship.

However, it's important to remember the information in Sugar is only as good as you make it. Raw data is fed into the system via mailing lists, trade shows and other marketing-related events. This data or "leads" must be qualified into "contacts." Sugar's effectiveness as a CRM tool is tied to how well leads are qualified and how well contacts are maintained within the database. In most cases leads are auto-assigned based on team and/or territory.

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## Training Overview

This training is divided into two key sections: Overview of Sugar and Practical Application of Sugar. Within this first section, Overview of Sugar we'll review the following:

- o Key concepts
- o Customer relationship workflow
- o Terms and definitions
- o Field rules
- o Navigation and user-interface elements

The second section of this training manual contains practical, step by step instructions for using Sugar on the job and is organized into a series of specific tasks related to managing client relationships. This includes:

- o Search techniques
- o Companies and contacts
- o Activities
- o Loans

Most of this manual and all of the practical step-by-step instruction sections are also available in the Sugar Online Training. This online training is designed as a reference for use while you are working in Sugar. To access these documents, click on the Training tab within Sugar or visit [interbayuniversity.com](http://interbayuniversity.com).

Each section also contains several "hands on" exercises designed to help you practice specific functions within Sugar. These exercises are designed to mirror actual on-the-job tasks. Exercises are referenced within the text with green markers on the right side and listed in the third section of the manual.

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## Summary

1. Sugar allows you to manage and maintain customer relationships.
2. Records in Sugar are linked to together allowing you to drill down on information.
3. This training manual is organized into two major sections: an overview of Sugar and practical step by step instructions.



## ***B. Similarities and Differences***

Although Sugar introduces a more efficient way to manage and access our client records, it still has several similarities to our previous CRM product, ACT. If you've used ACT at InterBay it is possible to leverage your knowledge of key concepts when learning Sugar. In this section we'll take a closer look at the ways Sugar and ACT are similar as well as highlight the ways in which Sugar is different. We'll also take a closer look at some of the key advantages offered by Sugar.

### **Similarities**

At first glance it appears Sugar is more different than ACT (or other CRM systems) than it is similar, the similarities occur in basic and relatively important areas.

- **Core CRM functionality** – Although Sugar organizes and accesses data differently, it is still designed to facilitate Customer Relationship Management (CRM). CRM is generally defined by a core set of functions related to a set of records containing specific information about each client and any related interactions. If you've worked with ACT, Salesforce.com, Siebel or any other CRM system, the concepts and functionality in Sugar will seem similar to you.
- **Companies/contacts organizational structure** – The information in Sugar is organized into companies and contacts. Company records contain key information about the organization or firm. Company records are linked to one or more contact records. This structure is similar to ACT or almost any CRM system. However, Sugar adds three additional record types: leads, activities and loans. These types are described under the Differences section below.
- **Source data** – It's important to remember the database within Sugar was initially populated with records exported from the old ACT system. Although the data was scrubbed before import, it still contains some duplicates and many areas of missing information. Also, new records are inputted from the same sources (industry lists, trade shows, etc.) As with ACT (or any CRM) the only way to confirm information and fill in gaps is direct communication with client contacts.

Keep similarities in mind when working with Sugar to provide a foundation for your functional knowledge and idea of possible pitfalls when using the system. If a concept or function seems similar to something you've seen a previous CRM it probably works in a similar manner.

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### **Differences**

In order to improve performance and efficiency, Sugar introduces a number of new concepts to CRM at InterBay.

- **Web-based interface** – The Sugar user-interface (UI) runs directly within a web browser, such as Internet Explorer. It uses web functionality and connectivity to access the information stored within a central database (most likely not at your physical location). This allows you to access the CRM from any computer with an internet connection. Also, many of the graphical elements



resemble features you've seen at other websites such as hypertext links and navigation tabs.

- **Explicit save** – One of the key differences within Sugar is the use of an “explicit save” rather than an “implicit save.” This means *you must physically click a Save or Update button to save any changes you make to a record.* Other CRM systems, such as ACT use an implicit save in which the record is updated whenever you move from field to field. The explicit save in Sugar is one result of its web-based interface.
- **Tracking of duplicates** – Although Sugar does not eliminate duplicate records, it does make duplicates much more track-able. Sugar maintains a history of all modifications to a record. This allows database administrators to examine the changes made to a record to determine when one record should be merged with another.

In addition to the differences above, Sugar introduces three new concepts into InterBay's CRM system:

- **Leads** – All new client records entered into the system are considered “leads.” This is a different type of record than a company or contact. Once key information about a lead is confirmed, such as address, phone, email, desire to receive faxes, etc., the lead can be converted to a contact. Qualifying and converting leads is a key stage of your workflow within Sugar.
- **Activities** – Sugar replaces the standard Note function in ACT and other CRM systems with “Activities.” Activities should always be linked to a lead or contact record and contain specific and detailed information about the communication event such as a call, email, fax or scheduled meeting (preferably with comments). This allows anyone accessing the contact record to see the full history of InterBay's interaction with the client.
- **Loans** – Initial information about individual loans or what used to be collected on the “Goldsheet” is now entered directly into Sugar. This also creates the initial MorVision record and the loan information can be printed and forwarded to a loan opener. Loan status is also updated in Sugar from MorVision. However, once a loan is created, all activity specific to the loan is entered within MorVision (not Sugar).

At first these differences take some adaptation but quickly become second nature. Although the introduction of Leads, Activities and Loans increases the amount of data entry, they exponentially increase the amount of detail available within a contact record.

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## Potential Issues

Based on its differences from other CRM systems, Sugar users sometimes face the following issues:

- **Need to save** – Because many users are used to ACT and other systems with an implicit save they sometimes forget to click the Save or Update button after entering or modifying information in Sugar.
  - **Solution:** Always click Save or Update.



- **Web page delay** – Because Sugar is web-based, its pages sometimes have a momentarily delay while the page “paints” itself. This is similar to the delays existing on almost any website and varies based on connectivity and traffic.
  - **Solution:** Always give the page a moment to fully load before clicking.
- **Use of the Back button** – Although the web browser’s Back button functions within Sugar as it would in any webpage, it’s important to remember this button loads the page from the web browser’s cache. In other words, it loads the page as it looked just a moment ago. This can prevent you from seeing any recent updates by yourself or other users.
  - **Solution:** Always use the Last Viewed bar or other Sugar buttons rather than the browser’s Back button.
- **Linking Activities** – Technically, you can create an activity within Sugar that is not linked to a specific contact. However, these activities are difficult to track and search within the database.
  - **Solution:** Always create an activity within a contact record.
- **Duplicates** – Although Sugar does not eliminate duplicates from the system, it does provide better tracking of the creation of duplicates.
  - **Solution:** Always search for an existing record before creating a new one.
- **Multiple calendars** – CRM-related activities can be scheduled directly within Sugar, including assignments for other members of the sales team. However, activities in the Sugar calendar can only be accessed by individuals with a Sugar login. There is currently no integration between Sugar’s calendar and the Lotus Notes Calendar.
  - **Solution:** Maintain your Sugar calendar for all client or external activities and your Notes Calendar for all InterBay or internal activities.
- **Email management** – Although you can use Sugar to send emails, there is currently no inbox feature and no direct integration with Lotus Notes. Therefore, any reply to your email appears within Notes.
  - **Solution:** Always cc yourself when sending an email from Sugar. This creates a record of the email within Notes.

If you are experiencing trouble within Sugar, check this list first and employ an appropriate solution.

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## Advantages of Sugar


Sugar’s differences offer several advantages and new areas of functionality.

- **Real time updates** – Since Sugar is a web-based interface to a central database, any updates are seen instantaneously by all users (sometimes a Refresh or Reload is required). There is no need for replication or batch updates.
- **Relational database** – As mentioned above, all of the records in Sugar are relational. Records are organized into inter-connected tables within the database. This allows you to see different levels of connected information and drilldown on details. You can also edit related details from the same screen.



- **Improved performance** – Because Sugar is designed to handle larger databases and scale accordingly, users should experience an overall improvement in performance over ACT and other CRM systems. Note: Actual performance may vary based on connection speed, computer specifications and current system traffic.
  - **More flexible access** – Because Sugar connects to a central database via the Internet, it can be accessed from any computer with an internet connection (and a web browser) including mobile devices such as the Blackberry. This allows you to view records from any location.
  - **Phone integration** – Sugar is integrated with the Cisco IP phones, allowing you to dial a contact number simply by clicking the number or a connect icon.
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## Summary

1. Sugar is similar to ACT and other CRM systems in basic functionality and the organization of records into companies and contacts.
  2. Sugar differs from ACT and other CRM systems because it is web-based and relational.
  3. Sugar introduces several new concepts into InterBay's CRM model including leads, activities and loans (as tracked within the CRM).
  4. Sugar's differences are both a source of potential issues and advantages.
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## ***C. Frequently Asked Questions***

Below are some of the main questions users have asked regarding Sugar and its introduction to InterBay. If your question does not appear below, ask your course instructor or your local Sugar administrator. You can also check [interbayuniversity.com](http://interbayuniversity.com) for an updated list of Frequently Asked Questions.

### **Is Sugar faster than ACT?**

Sugar is better designed to handle the number of records within InterBay's database and should be more scalable over the long-term. Performance using InterBay's Internet connection should be greatly improved over ACT. However, because Sugar is web-based, pages may sometimes take a moment to "paint" themselves. Also, performance outside of the company is based on Internet connection speed, computer specifications and current traffic on the system.

### **Does Sugar remove duplicates from the database?**

The ACT database was scrubbed prior to the Sugar conversion to remove many of the duplicates within the system. In addition, Sugar provides a function to merge records. However, duplicates are inevitable in any sales database. Sugar administrators actively look for duplicates and remove them when they are found. Sugar also provides stronger tracking of duplicate records via its history and log functionality.

### **Is Sugar easier to use?**

Because Sugar uses a web-based interface and links records together it is generally easy to use. Common navigation elements are carried over from screen to screen. Once a user learns these common elements they generally have little trouble working within the software. Sugar also has several features similar to ACT and other CRM systems, providing an overall familiarity among users.

### **Can I access Sugar on my Blackberry?**

Limited functionality is available on the Blackberry. You can access basic contact and lead information, click to dial/email and update existing activity records (such as adding notes to an already scheduled meeting). You can also add leads from the Blackberry.

### **Does Sugar contain enhanced searching?**

Sugar contains basic searching capability. Specifically, users can use wildcards and within what specific record types to search. Searches return results from multiple record types simultaneously and allow users to drilldown on more detailed information or edit specific records.

### **Does Sugar offer pipeline management?**

At this time BOXi reports are a better resource for pipeline management. Enhanced pipeline management is planned for a later version of Sugar.



### **Does Sugar integrate with Lotus Notes?**

Sugar currently has no integration with Lotus Notes, preventing any direct link between their respective calendar and email functions. Only Sugar users can access the Sugar calendar, making it unsuitable for internal meetings involving non-Sugar users. Also, emails can only be sent from Sugar (not received or viewed). It's recommend you cc your email address when sending emails from Sugar to place a copy of the email within your Lotus Notes inbox.

### **Who do I contact if I have a problem with Sugar?**

For help with Sugar contact either the HelpDesk or your local Sugar administrator. Self-paced help is also available by clicking the Training button within Sugar or visiting [interbayuniversity.com](http://interbayuniversity.com). Generic (non-InterBay specific) help on Sugar functions is available via the Help link on most screens.

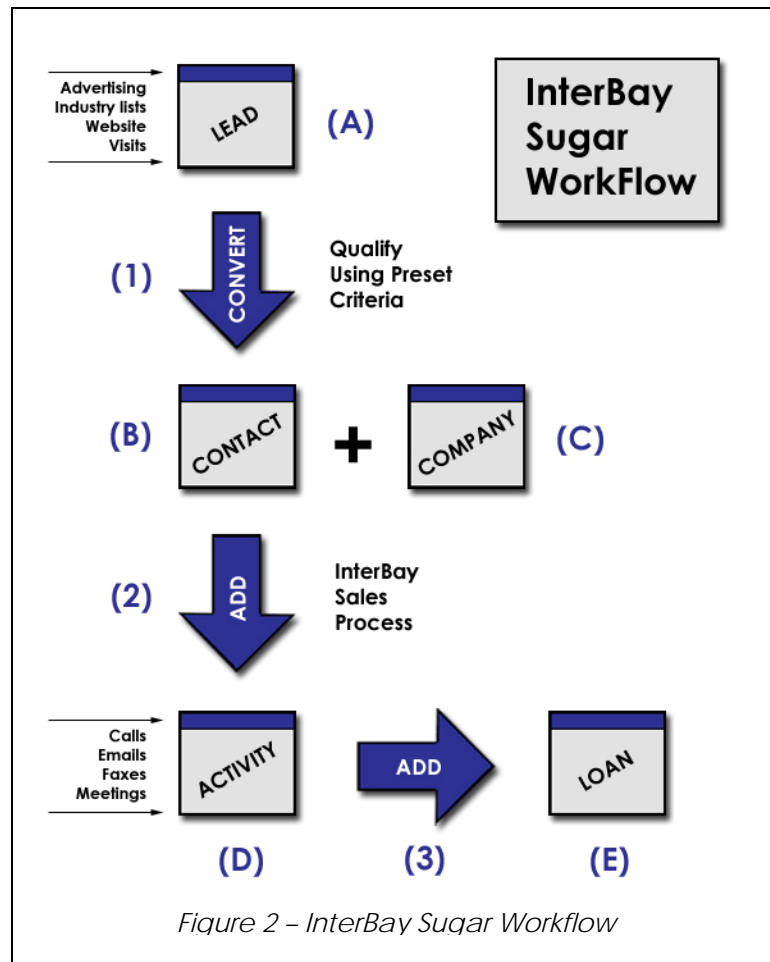


## D. Vocabulary

Sugar was adapted to fit within the existing InterBay business model and sales strategy. However, in order to take full advantage of the Sugar's functionality, there are some changes to InterBay's specific workflow and introduction of new terms to our vocabulary. In this section we'll explore the changes to our workflow and look at the new terms associated with the workflow and the system itself. We'll also review the field rules within Sugar.

### Workflow

Sugar both integrates with and enhances our standard relationship-building workflow at InterBay. The system includes tracking for all of our existing client touch points and adds two new areas of functionality within the workflow:



- **Introduction of Leads.** All incoming client records are initially set up as "leads." Leads are then qualified and converted to contacts (associated with a company). This introduces a new level of detail within our existing sales process. Previously, the terms "contact" and "lead" were virtually synonymous and contacts were simply graded according to highly interested, interested, uninterested or tagged (X) for removal. Removals were mainly limited to duplicate records. Under the Sugar workflow, leads must be qualified with a series of specific questions before they can be converted to actual contacts.
- **Increased detail in Activities.** Within InterBay original CRM system, comments about a contact or related activities were contained within the Notes section of the record. Notes were open-ended and inconsistent within the database. Sugar introduces a series of specific activities that replace the Note section within ACT. When reporting a client touch point or communication within Sugar users choose from a specific set of types: calls, meetings, email, fax or task. Comments contain activities not easily classified in one of the other types. Comments also contain any legacy Notes from the old ACT records.



The actual workflow within Sugar includes five major elements (labeled A-E) and three major action areas (labeled 1-3). **Leads (A)** are imported into the system as they are obtained from various sources such as advertising response, website form, incoming call, mailing list, cold visit, etc. Leads are then qualified and **converted (1)** into **contacts (B)** based on a series of preset questions. All contacts must be associated with a **company (C)**. If the contact is not associated with an existing company within the database, a new company can be created at the same time as the contact.

**NOTE:** Always search for the new contact's company before creating a new company. This prevents duplicate records from entering the system.

Once the lead has been converted to a contact, a series of **activities (D)** are performed. This includes calls, emails, meetings, etc. All of these activities are **added (2)** into the system and linked to the specific contact. This creates a history all of the actions taken with the contact. The goal of all these activities is to obtain a **loan (E)** from the contact. The loan is **added (3)** in Sugar using the initial information and then printed out for the loan opener.

At this point, the MorVision record is created and all subsequent communication regarding the loan is noted within that system. MorVision links back to the company ID in Sugar and updates the status of the loan accordingly.

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## Terms and Definition

Sugar introduces a number of new terms into the InterBay vocabulary. The list below includes any new terms and highlights key existing terms. Note that some of our previously existing terms change slightly in meaning within the implementation of Sugar. This list is broken down into workflow-related and system-related terms. More extensive review of system terms is provided in section *E. Navigation*.

### *Workflow-related terms*

**Activity** – An Activity is a specific touch point or communication with a contact or lead within Sugar. Activities include calls, emails, meetings, faxes and tasks. Activities replace contact notes within InterBay's sales workflow.

**Calls** – Calls are one type of Activity. Several of the options on calls differ based your role (internal sales, external sales, call center). Phone calls have always been integral part of our sales process; however it's import to review the specific call types:

- o Inside Sales
- o Outside Sales
- o Call Center

**Comments** – Comments are one type of Activity. Comments are used for observations about a contact such as qualifying comments, discussion topics and DiSC type. Comments hold the legacy information from the Notes section of ACT.



**E-mail** – Email is a type of Activity. Emails are also a separate module within Sugar allowing a user to send an email based on a specific template within Sugar.

**Fax** – Fax is a type of Activity. Faxes are also a separate module within Sugar allowing a user to send a fax based on a specific template within Sugar. This module is used mainly by marketing.

**Lead** – A lead is an unqualified Contact. This is defined as any of the following:

- o Individual that InterBay Inside Sales or Call Center staff has never made live contact with (leaving a message doesn't qualify as live contact).
- o Individual with inadequate contact information (not all required fields can be filled out to save as a Contact).
- o Individual that has been contacted but does not want any future dealings with InterBay (contact grade of X).

**Meetings** – Meetings are a type of Activity. Meetings are used to describe face to face meetings between sales people and brokers. They are typically conducted by the external sales force.

**Tasks** – Tasks are a type of Activity and are similar to a "to do" list.

#### *System-related Terms*

**CRM (Customer Relationship Management)** – CRM is a general term used to describe software and databases designed to contain and track client information. Sugar, ACT and Salesforce.com are all examples of CRM systems.

**Module** – A Module is a technical element of Sugar. Modules contain functionality related to specific record types, such as companies, contacts, calendar, etc. Modules appear as tabs on the Sugar interface.

**Panel** – A Panel is an element of Sugar's user interface. Panels display information related to the current module (see related definition). For example, within the contacts module, the panel contains a list or detail view of contact records.

**Record** – A Record is a technical element of Sugar. Records are information containers and each includes several fields of data. Records are grouped into modules (see related definition).

**Sub-panel** – A Sub-panel is an element of Sugar's user interface. Sub-panels display information from modules linked to the current module. For example, within the contacts module, the panel (see related definition) contains a view of the current contact record and the sub-panel contains a view of activities related to the current contact. Sub-panels can be opened and closed.

The list above contains terms new to InterBay and specific to our implementation of Sugar. A full list of CRM-related terms is available at <http://www.crm2day.com/glossary/>.



## Field Rules

Field rules within a CRM or other database system are designed to provide consistency among the records. For example, an organization must decide whether everyone enters a state as "PA" or "Pennsylvania." Field rules physically limit the way information can be entered into a record. In the previous example, the state field would be programmed to only accept to digits, or even a pre-populated dropdown box containing all fifty states (or even just the states in which the organization does business). In most cases the actual fields within Sugar limit and guide you on the precise format. When in doubt, you can also check the same field within other records.

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## Summary

1. InterBay's implementation of Sugar is designed to integrate into and enhance our existing workflow.
  2. InterBay's workflow within Sugar uses the following sequence:
    - a. New and unqualified contacts are entered in the system as leads.
    - b. Leads are qualified using a specific set of criteria and converted to contacts. Every contact must be associated with a company.
    - c. Activities are conducted with a contact with the goal of having them submit a loan.
    - d. Loan records are initially created within Sugar and then printed out for distribution to a loan opener. This also creates a record within MorVision.
    - e. Subsequent comments and notes related to the loan are entered into MorVision.
  3. In order to maintain standardization among all records, Sugar maintains a set of rules defining the format for data entry into each field.
- 



## E. Navigation

Most of the navigation elements in Sugar carry over from screen to screen. Screens are generally organized into zones. Zones contain functionality specific to that area of the screen. In this section we'll take a closer look at the main elements of the Sugar user interface and practice moving around within the application.

### Login

Although Sugar is accessible via any computer with a web connection, a login function is necessary to maintain security. Your login information is supplied by your Sugar Administrator.

**NOTE:** Users are automatically logged out of Sugar after 60 minutes of non-activity. Consider doing an action or two during calls or downtime to keep the application live. Clicking a sub-panel open then closed is a good way to show activity without leaving your current screen.

#### Use the following steps to login to Sugar:

**Step 1:** **Internal users:** Open Internet Explorer and type ibsugar within the location area. **External users:** Use the SRA remote server and click on the Sugar icon after navigating to the application folder for your branch. (Training on the SRA is available at [interbayuniversity.com](http://interbayuniversity.com).)

**Step 2:** Click the Go button.

**TIP:** Bookmark this page so you do not need to re-type the address the next time you access Sugar.

**Step 3:** Enter your Username and Password.

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### Screen Zones

The Sugar interface is generally divided into five main zones: System Tabs, Module Tabs, Last Viewed, Shortcuts Bar and the Content Area.

#### *System Tabs (Zone 1)*

The System Tabs link to maintenance functions within Sugar. These functions allow you to view and in some cases change global settings within Sugar. There are five system tabs:



- **My Account** – My Account contains settings related directly to your login such as name, password, contact information and settings. Most of this area can be set only by Sugar Administrators.
- **Training** – Training links to this manual, online task-based training, job aids and other useful resources to help you use Sugar more effectively.
- **Employees** – Employees contains a directory of all Sugar users. Note this directory contains *only employees with a Sugar login* and as such is not a listing of all employees within InterBay or BayView.
- **Logout** – Logout closes your connection with the Sugar database and performs certain “housekeeping” functions to keep your view of Sugar running efficiently. Always use the Logout button when closing Sugar.
- **About** – About contains basic information about the version and licensing of our Sugar implementation.
- **(Global) Search** – The global search allows you to perform a keyword search across several modules at once. Click on the small icon to the left of the word “Search” to check or uncheck modules. More detail on all the search functions is provided in Module II.

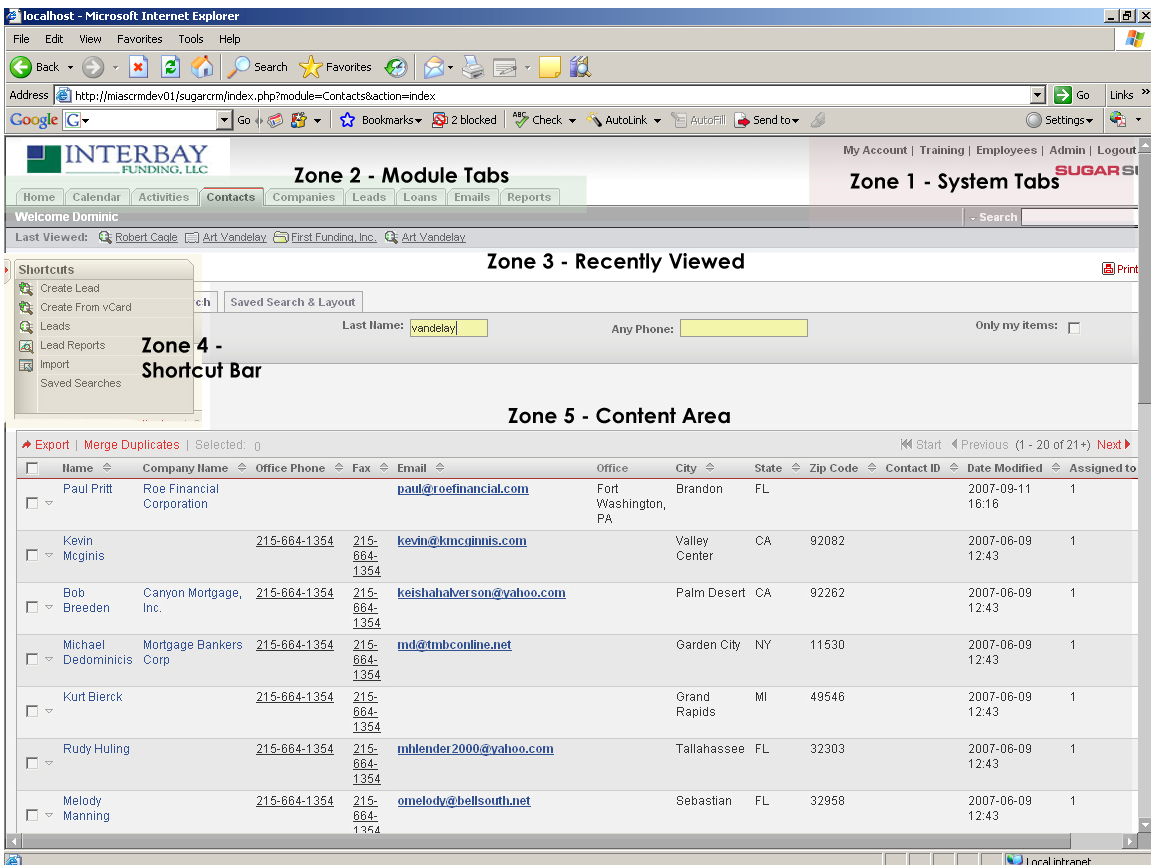


Figure 3 – Sugar Screen Zones.



### *Module Tabs (Zone 2)*

The Module Tabs link to all of the major modules available within Sugar. These functions allow you to view specific record areas within Sugar. Most of your initial navigation within Sugar takes place within the module tabs. There are ten modules within InterBay's implementation of Sugar (some of which have related modules):

- **Leads** – The leads module contains records of unqualified contacts. Records in this module can be converted to contacts once they have been qualified using preset criteria.
- **Companies** – Companies contains records of specific organizations. Records in this module are linked to the specific contacts within the organization.
- **Contacts** – Contacts contains records of specific individuals. Records in this module must be linked to a specific company record. The contacts module contains more specific information about individual clients including direct phone number, email, etc.
- **Loans** – Loans contains records of specific deals and equates to document formerly known as the "Gold Sheet." Loans must be linked to a contact and also connect to MorVision.
- **Activities** – Activities contains specific information regarding the touch points or communications with a contact. In order to be effective, activities should always be created within a specific contact. There are five types of activities:
  - **Calls** – Calls contain information about outgoing and incoming calls. Within Sugar, calls are marked as outgoing or incoming within the record. This information is used for tracking and reporting purposes.
  - **Emails** – Emails contain information about outgoing emails. Emails can be sent from Sugar and several email templates are available within the CRM. However, because Sugar has no inbox functionality replies arrive in Lotus Notes.
  - **Meetings** – Meetings contain information about physical meetings with a contact. This type of activity is mainly used by external sales personnel.
  - **Comments** – Comments contain general information or useful observations about a contact (that do not easily fit into one of the other activity types). Comments also contain the legacy notes from ACT.
  - **Tasks** – Tasks contain "to do" items.
- **Calendar** – Calendar collects the information entered into activities within a time management-based view. This allows users to view their sales-related schedule at a glance. Note: This calendar has no connection with the Lotus Notes calendar and only shows activities related to Sugar users.

### *Last Viewed (Zone 3)*

The Last Viewed bar works similar to the History function on a web browser. The buttons listed on this bar link to modules and records you've viewed recently. The bar constantly updates as you navigate through Sugar and links move from left to right, eventually dropping off the bar. Always use the Last Viewed bar rather than the Back button of the browser to see the most up to date version of a page.



### *Shortcuts Bar (Zone 4)*

The Shortcuts Bar always appears at the left side of the screen and just below the Last Viewed bar. The Shortcut Bar provides quick access to the most common functions within each module and changes based on the current module.

The Shortcut Bar can be closed at any time by clicking the triangle button to the left of the "SHORTCUTS" title at the top of the Shortcut Bar. The bar can be re-opened by clicking this button a second time. Closing the Shortcut Bar increases the size of the Content Area.

### *Content Area (Zone 5)*

The Content Area contains list or detail views of records within the current module. The Content Area changes its appearance and functionality based on the current module and view. More information about views is covered in next section, Records and Views.

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## **Records and Views**

Records represent the core information units within Sugar. Each record contains several fields, dictated by the type of record. For example, a contact record would contain fields such as first name, last name, address information, phone number, etc. An activity record would contain fields such as type, date, time, etc.

However, more detailed information is available once you click on a specific module such as companies, contacts or activities. Once you click on a module, the Content Area is filled with record content.

The top of record content is always dominated by the search function. The Search function is covered in more detail in Module II. Immediately below the search function is one of two record view types: List View and Detail View.

### *List View*

The List View provides an at glance view of the first 1-20 records (depending on your preferences), organized in sort-able columns. Click on a record to display the full contents of the record in detail form. List View offers the following functions:

- **Detail Drilldown (A)** – The items listed under each column are links to detail information or related functionality. For example, the first column (such as "name" under contacts) drills down to the records' detail view while clicking on a phone number initiates the auto-dial function.
- **Dynamic Sorting (B)** – Click on any of the column headings to dynamically sort the list view according to that column. Click the column name again to toggle between ascending and descending order. The small, darkened triangle to the right of the column heading indicates the current sort and whether it ascending or descending.



- **Record Controls (C)** – Just above and to the right of column headings are Start, Previous, Next and End buttons that navigate through the list view. For example, if records 1-20 are currently listed, clicking next would move forward to a list view of records 21-40.
- **Edit Button (D)** – The edit button appears as a small gray pencil to the right of each row and allows you to view a record immediately in edit mode (by default records open in read mode).

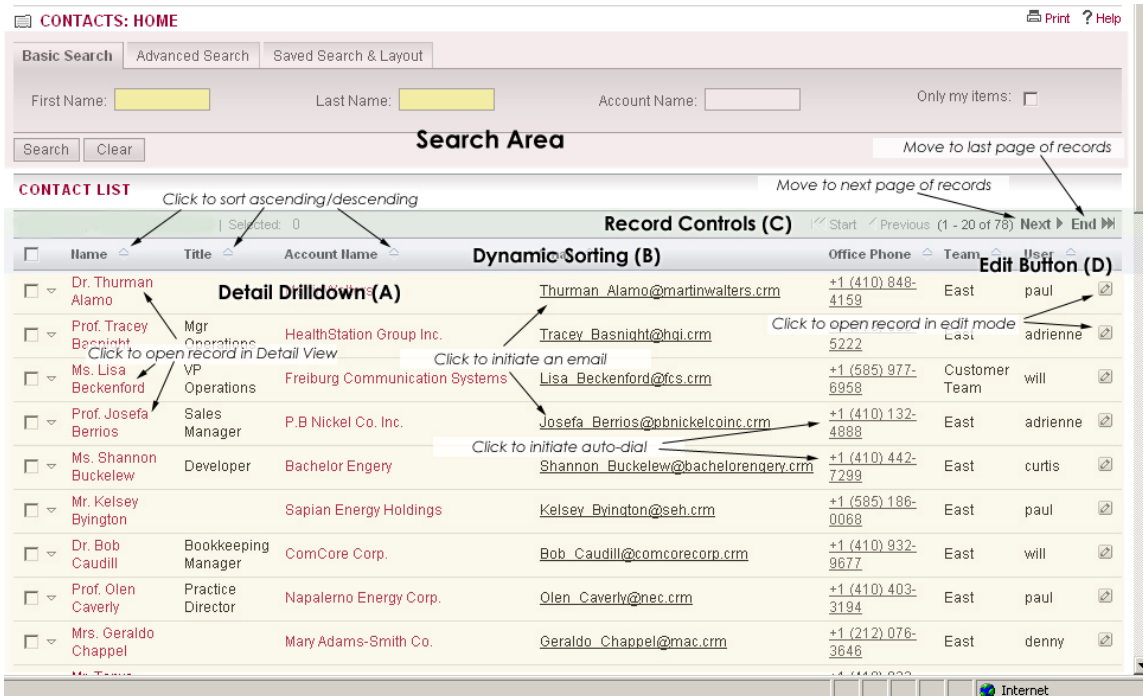


Figure 4 – List View.

### Detail View

The Detail View provides the full record detail including all fields associated with that record. Detail View offers the following functions:

- **Edit Button (A)** – The edit button appears just above the record and allows you to view a record immediately in edit mode (by default records open in read mode).
- **View Change Log (B)** – Located just under the edit button the View Change Log link displays all of the changes made to the record.
- **Record Controls (C)** – Just above and to the right of column headings are Start, Previous, Next and End buttons that navigate through the detail views of all the individual records. For example, clicking on the Next button would move to the next record in the current sorting sequence (as indicated on the List View). To change the sorting, click on the Return to List link in this same area.
- **Detail Drilldown (D)** – Field values appearing as links are clickable and switch the view to module associated with that field. For example, within a company record, clicking on a contact name switches the mode to the contact module and displays the detail for the specific contact.



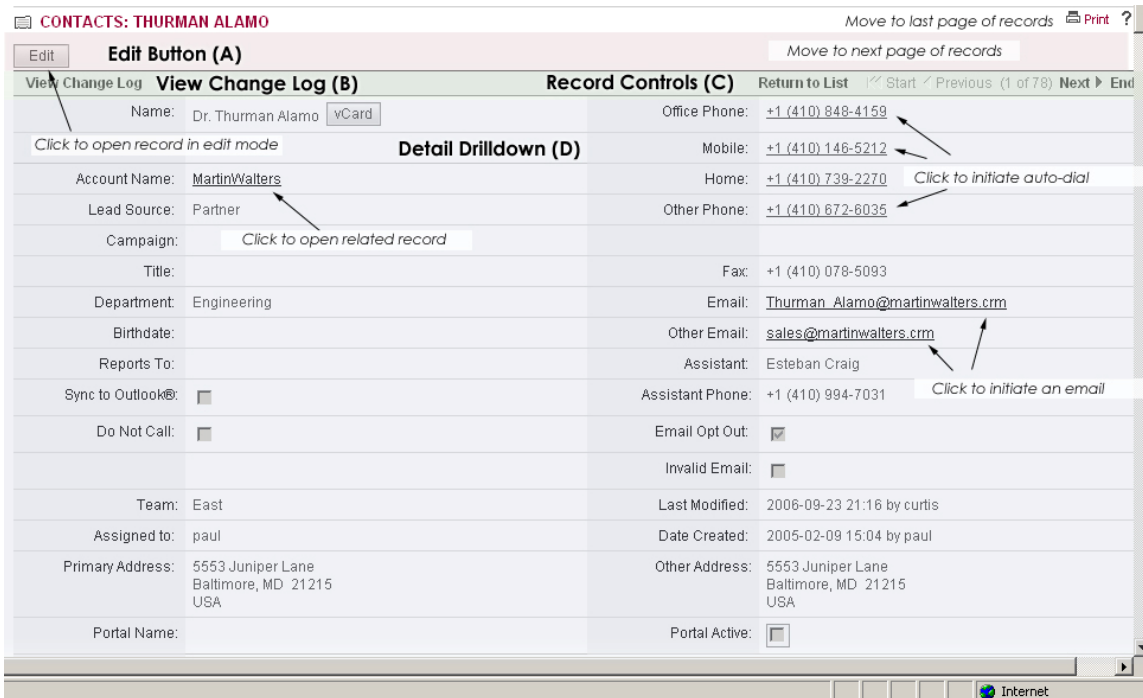


Figure 5 – Detail View.

Also included in the Detail View are sub-panels. These sub-panels display records from related modules in List View. Sub-panels are covered in more detail in the next section.

## Panels and Sub-panels

Detail View is divided into two main sections: the main panel and several sub-panels. The main panel always appears at the top of the Content Area and contains all fields on the currently selected record (and related module). Below the main panel are usually one or more sub-panels.

















These sub-panels contain records from related modules. For example, a company record contains details on about the company within the main panel and a sub-panel listing related records from the contact module. A contact record contains details about the contact in the main panel and a sub-panel listing related records from the activities module. A second sub-panel may contain related records from the loan module.

Information in sub-panels is always presented in List View – including all the List View functions listed in the previous section. In addition, sub-panels can be opened and closed using the double-carrot symbol immediately to the left of the sub-panel’s title. Click the double-carrot again to re-open the sub-panel.



## Icons

To provide additional visual cues, Sugar uses a series of standard icons to identify modules and functions. These icons are listed in the table below:

Modules	
	Calendar
	Calls
	Companies
	Comments
	Contacts
	Emails
	Leads
	Loans
	Meetings
	Tasks
Functions	
	Close
	Create/Add
	Edit
	Refresh
	Show Additional
	Sort

Module icons appear consistently within Last Viewed and the Shortcut Bar. Function icons appear within the list and detail views of records if available.

---

## Summary

1. The Sugar interface is generally divided into five main zones: System Tabs, Module Tabs, Last Viewed, Shortcuts Bar and the Content Area.
2. There are two types of record views in Sugar: List View and Detail View. List View provides a low level of detail for several records in sort-able columns. Detail View provides all the field information for one record.
3. With Detail View, the main panel contains all the fields of the primary record and sub-panels contain List View information from related modules.
4. Sugar uses several standard icons to provide visual cues on the purpose of modules and functions.



## II. Practical Application of Sugar

After completing this chapter, you will be able to...

- Describe the types of searching available in Sugar.
- Convert a lead to a contact.
- Edit companies and contacts.
- Describe the types of activities.
- Create and edit activities.
- Create and edit a loan.



### A. Search Techniques

Sugar offers three main types of search: Global Search, Basic Search and Advanced Search. Each search has its own advantages and limitations. Choose your search method based on the desired result. Also, the search functions in Sugar are designed to provide quick access to specific records based on specific criteria, such as a contact or lead's "last name." For advanced analysis of multiple records, the Reports module is more effective.

**TIP:** Searches in Sugar are not case sensitive and automatically apply a wildcard (\*) to the end of every search term.

#### *Search Results*

The results of all searches are organized according to modules and in are List View. Search results have all the same functionality as the standard List View screen. For example you can sort columns using the small triangles to the left of the column headings or step into Edit View using the pencil icon to the right of the record.

#### **Global Search**

Global Search is located at the top right of all screens and is the only method of searching within multiple modules at one time. For example, you can search within leads and contacts at the same time if you are unsure if a broker contact has been converted. Also, it's often more efficient to search within specific modules. If you know the information you're looking for would not be found within the loans modules, it's faster to turn that module off.

**NOTE:** After toggling modules on and off, do not close the toggle window. Click the Go button with the toggle window still open. Global search defaults back to searching all modules once the toggle window is closed.

By default global search looks in all modules. Click on the small triangle to the left of "Search" to toggle the modules on and off.



At the top of the results screen is an expanded version of global search featuring the module toggles. To search again, simply type your new or modified search string in the text box, adjust the module toggles and click the Search button.

**Use the following steps to perform a Global Search:**

- Step 1:** Click the cursor within the text box to the left of "Search" on the top right of the Sugar interface.
- Step 2:** Enter your search criteria.
- Step 3:** Click on the small triangle to the right of "Search" and toggle modules on and off as necessary.
- Step 4:** Click the Go button (without closing the toggle window).

---

## Basic Search

Both the Basic Search and the Advanced Search functions are located within each module at the top of the List View and only search within the current module. For example, the search function at the top of contacts only searches records within contacts. If you search for "John Smith" and "John Smith" is only listed as a lead the record will not appear within a search on the contacts module.

Basic Search allows you to search within key fields within the records. These fields vary by module. For example, within the contacts module you can search by First Name, Last Name, Company Name or Any Phone (which searches all listed phone numbers within a record). To narrow search results, enter multiple criteria, such as "John" within First Name and "Smith" within Last Name. This search lists any record containing the full name "John Smith" as opposed to just search for the last name "Smith," which provides any record with the last name "Smith."

Click the Search button to start your search and Clear button to remove existing text from all search fields. Clicking the Clear button also returns the List View to the default listing of all records.



**Use the following steps to perform a Basic Search:**

- Step 1:** Click on a module tab.
- Step 2:** Type one or more search criteria.
- Step 3:** Click the Search button.
- Step 4:** Click the Clear button to remove the search criteria and view all records.

---

## **Advanced Search**

Advanced Search allows you to search on any and all fields within records. Like Basic Search, Advanced Search only looks within the current module. Any search criteria you enter in Basic Search carries over once you click on the Advanced Search tab. Advanced Search is a good technique for narrowing searches that initially produce too many results. More information on narrowing results and other search techniques is presented later within this section.

Advanced Search also includes both a Search and a Clear button and results are returned in List View. Several of the fields within Advanced Search are list boxes. To search on these fields, click to select one or more choices within the list box.

**TIP:** To select multiple items from a list box, hold down the CTRL key to select more than one item at a time or click the SHIFT key to select a range of items.

**Use the following steps to perform an Advanced Search:**

- Step 1:** Click on a module tab.
- Step 2:** Click on the Advanced Search tab.
- Step 3:** Type (or select) one or more search criteria.
- Step 4:** Click the Search button.
- Step 5:** Click the Clear button to clear the search criteria and view all records.



## Search Strategies

Efficient searching is part science and part art. There are several specific techniques you can employ to not only get the right results, but get the right results in a shorter amount of time. Use the strategies below to get more out of your searches.

### *Wildcards*

One of the quickest and easiest ways to improve your search results is to use wildcards. Many people are already familiar with the practice of placing a wildcard or "\*" at the end of your search string. For example, if you don't remember whether your contact's name was "Smith" or "Smithson" you could simply search for "Smith\*". This search would return either name. Sugar automatically appends a wildcard on the end of any search term. In other words, searching for "Smith" would always return either "Smith" or "Smithson."

However, you can use a wildcard anywhere within a search term. For example, if you were looking for a company called something "American" you could search for "american." This would return records such as "First American Mortgage," "American Financing Corporation" and "North American Funding." To widen the search you could remove the "n" and just search for "\*america." Sugar automatically appends the wildcard to the end of the string and returns all of the results above along with records such as "Re-finance America" and "America's Funding Source, Inc."

You can also use wildcards in the middle of a search string. For example, if your contact's name is either "Smithson" or "Smithsen" search for "Smiths\*n" and Sugar returns either spelling of the name. Another variation of the wildcard technique can be used with numbers. If we wanted to see all the companies within a certain urban area we could use a wildcard to search within a series of zip codes: "02\*1\*". This search would return all the companies with zip codes ranging between 02010 and 02919.

### *Wide to narrow/Narrow to wide*

There are generally two overall ways to approach a search: wide to narrow or narrow to wide. In a wide to narrow search, you start with a broad search criteria and then narrowly work your way down to more specific results. For example, you could search for every company in Colorado by choosing "CO" under state. From there you could narrow your search by date of last activity. Wide to narrow searches are most useful when the desired result is a *set of records*.

In a narrow to wide search, you start with more specific criteria. You only broaden the criteria if you don't immediately find the target record. This is the type of search you perform whenever looking for a specific contact name. Narrow to wide searches are most useful when the desired result is a *specific record*.

### *Using Sub-panels*

When searching in Sugar keep in mind the application always nests related information within Sub-panels. In other words, there are usually multiple paths to the different records. You can search for loans within the loan module, however loans also appear as sub-panels when you search for contacts and go to the Detail View of a specific record. This can provide a larger context or a different perspective on the information. If you



look up loan records via the contact module, you'll also see the List View of all the activities for the company in a separate sub-panel. This provides a full picture of the relationship with the company and could provide insight into the loan status.

### *Sugar Limitations*

Some of the search techniques you may already be familiar with through Google and other engines are not available in Sugar. Sugar cannot perform Boolean searches, such as the use of "and, or, +, -." It also cannot search by an exact phrase placed in quotes.

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### **Saved Search & Layout**

Sugar offers the ability to save frequently run Basic Searches and Advanced Searches. You can also preset the columns displayed. This functionality works by saving a search already performed, not planning a search in advance (such as you might do with a report). To create a saved and customized search, perform the search first using either the Basic Search tab or the Advanced Search tab. Once your search is complete and you have verified the results, click on the third tab within the search panel (Saved Search & Layout).

On the Saved Search & Layout tab you can define the columns you prefer to display and hide within the search results using the left and right arrows. You can also change the order of the columns using the up and down arrows. To the far right of the search panel are additional options for sorting and the order of the results. A drop down list at the bottom right of the panel holds any previously saved searches.

**TIP:** Use Saved Search & Layout to save wide to narrow searches you use on a regular basis, such specific views of all the broker contacts within a certain area or those who have pre-opted into emails and/or faxes.



**Use the following steps to save a customized search:**

- Step 1:** Click on a module tab.
- Step 2:** Click on either the Basic Search or the Advanced Search tab.
- Step 3:** Type (or select) one or more search criteria.
- Step 4:** Click the Search button.
- Step 5:** Verify the search returns the desired results. If necessary, make any adjustments to the search and click the Search button again.
- Step 6:** Once you are satisfied with the results of the search click on the Saved Search & Layout tab.
- Step 7:** Use the left and right arrows to move column headings from the "Display Columns" and "Hide Columns" list boxes. Place all the columns you want to include in your results in the "Display Columns" list box.
- Step 8:** Use the up and down arrows to move the column headings within the "Display Columns" list box until they are in the desired order.
- Step 9:** Use the "Order by Column" drop down at the right of the search panel to choose a main column by which to sort the results.
- Step 10:** Use the radio buttons next to "Direction" to choose whether to sort the columns in ascending or descending order.
- Step 11:** Type a name for the search in the text box next to "Save this search as" on the bottom left side of the search panel.
- Step 12:** Click the Save button.



## Summary

1. Sugar offers three types of search: Global Search, Basic Search and Advanced Search.
2. Global Search is accessible at the top right of all screens within Sugar and allows you to search within multiple modules at once (click the down arrow to the left of "Search" to toggle modules on and off).
3. Basic Search and Advanced Search are available at the top of every module within List View. Each appears on a tab at the top of the List View of any module and is specific to the current module.
4. Basic Search allows you to look within the main fields of a record. Advanced Search allows you to look within any fields in the record.
5. You can save searches once you've clicked Search by clicking on the Saved Search & Results tab.



## ***B. Working with Leads and Contacts***

Most of the work within Sugar is performed within the leads and contacts modules. These records contain specific information about the broker contacts you'll interact with on a regular basis. Although contacts must belong to a company, the creation of a company (or association to an existing company) is almost always triggered by the conversion of a lead to a contact. Likewise, activities and loans are created from within a contact record.

Your daily work with leads and contacts includes the following tasks:

- **Qualify and create a lead.**
- **Convert a lead to a contact.**
- **Create or link a company to a contact.**
- **Edit contact (or company) information.**

One of the keys to successful completion of these activities is to ***always search before creating a lead, contact or company***. This reduces the number of duplicate records within the database and maintains the overall integrity and consistency of the data. Searching before creating is one of the most important aspects of using Sugar.

### **Grading of Leads and Contacts**

#### *Initial Import into Sugar*

When InterBay's original CRM database was imported from ACT to Sugar some of the client record could be converted directly to contacts and other records could only be transferred as leads. Sugar has several additional required fields for a contact record than the original database. Most notably, all contacts must be associated with a specific company. Many of the records in the original ACT database were not necessarily associated with a company. Other factors, such as whether or not the assigned LO was still with InterBay were also considered. Records from ACT appear as leads in Sugar if any of the following situations is true:

- No active IB employee is listed as the Inside LO
- Any of the of the following fields is absent in ACT:
  - First Name
  - Last Name
  - Company Name (i.e. orphaned contacts)
  - Office Phone
  - City
  - State

Also, no dead (X) leads are moved into Sugar for Phase I. Review this logic when searching for an older record from the original database to determine whether to initial look in contacts or leads. You can also perform a global search and choose both the contact and lead checkmarks from the options box (click on the small triangle to the left of global search).



## Grading of Contacts and Leads

Sugar automatically calculates a grade for a companies, contacts and leads. Much of the grade on contacts is inherited from the company grade (although there are allowances for contacts leaving a company and other events. In most cases Sugar's determination is based on data from MorVision regarding the amount of activity within a certain period of time. The table below summarizes Sugar's grading system:

Type	Basis	Specifics
<b>Company Grade</b>	Auto-calculated based on MorVision data.	Same criteria currently displayed in ACT's production grade field (1: 5+ loans in 12months, 2: 1-4 loans in 12months, 3: 0 loans in 12 months)
<b>Contact Grade</b>	Auto-calculated based on MorVision data.	H = 1 or more closed loans in a year (i.e. most recent funded date is within previous 12 months) I = 1 or more pre-approved loans in a year (i.e. most recent preapproval date is within previous 12 months) U = No pre-approved loans in a year (i.e. most recent preapproval date is NOT within previous 12 months)
	The "X - delete" field on the contact record has several dropdown choices based on the situation.	Duplicate Record No Longer with Company Company out of Business Not a Mortgage Broker Brokers Request
<b>Lead Grade</b>	Same as above.	Status also includes "New" and "Converted."

**NOTE:** At first it may seem odd that some older contacts within Sugar are converted to Leads even though there is MorVision activity and a clear grade. However, the data requirements of Sugar (specifically the association of contact with a company) make it impossible to import these records as contacts and maintain the overall data integrity. The reliability of any database is directly correlated to the consistent enforcement of its underlying rules.

## Qualify and Create a Lead

All new broker contacts within Sugar start as leads, regardless of the source or amount of information known about the contact. ***In order to create a new contact within Sugar, you must create a lead first.*** Then you can convert the lead to a contact. Although you



may occasionally do both at one time if you have enough qualifying information, these actions must be completed in this specific order:

- A. Create the lead.
- B. Convert the lead to a contact.

InterBay's implementation of Sugar does not allow contacts to be created without first creating a lead. Most of the time leads are automatically entered into the system and assigned to teams and/or individuals. Leads are constantly generated from the InterBay website, advertising, industry lists, trade shows, InterBay Academy and other sources. However, occasionally you may come across a lead on your own:

- o A Call Center representative receives an incoming call from a broker contact not in the database.
- o An internal salesperson discovers a new broker contact within an existing company.
- o An external salesperson discovers a mortgage office while visiting another mortgage broker.

**Use the following steps to create a Lead:**

**Step 1:** Click on the Leads tab.

**Step 2:** Use Basic Search to look up the name (to ensure it does not already exist). If a similar record isn't found, proceed to the next step.

**Step 3:** From the Shortcuts menu on the left, click "Create Lead." (If your Shortcuts menu is closed, move the cursor over top of the red triangle immediately to the left of "Leads: Home." The Shortcuts menu appears.)

**Step 4:** Type all the information known about the lead, but the Last Name is required. The following fields are recommended: First Name, Company Name, Office Phone and Email.

**Step 5:** Use the other tabs such as Lead Source and Address to fill in additional information about the lead.

**Step 6:** Click Save. The Detail View of the saved record appears.

When speaking with a lead the first time, ask the lead if they are willing to receive faxes and/or emails. This saves time when you are ready to convert the lead to a contact. If they are willing to receive faxes, click a check in the box to the right of "Ok to Fax." If they are willing to receive emails, leave the box next to "Email Opt Out" blank. Only check this box if they do not want to receive emails.

**NOTE:** The fax and email toggles essentially work the opposite of each other. The fax box gets checked if they do want to receive faxes and the email box gets checked if they do not want to receive emails.



## Convert a lead to a contact / Create or link a company to a contact.

Existing leads can be converted to contacts using the Convert Lead button within the lead Detail View. Contacts have more required fields than leads and also require creation or linking to a company record. However, the form and fields are similar to a lead record in Edit View.

The main difference within the convert form is the addition of the Related Records section. Within this section you'll indicate the existing company or create a new company. You also have the option of creating either a loan or activity at the same time. This works well when a previously unqualified lead sends in a loan or if you wish to make it a common practice to always follow-up with a newly qualified lead.

The "create company" option is checked by default within Related Records. To link the converted lead to an existing company, simply uncheck the box next to "create company." This changes the text to "Select Company" and provides a Select button. Clicking the Select button opens a new window with the company module in List View. Use the Basic Search or Advanced Search to locate the existing company and click it to select it.

**NOTE:** You should always search for an existing company before adding a new one to avoid the creation of duplicate records (and save yourself some data entry).

In order to convert a lead to a company, the following fields are required:

- o First Name
- o Last Name
- o Company Name
- o City (from primary)
- o State (from primary)
- o Office Phone
- o Contact ID (auto-populated)
- o Assigned To (auto-populated)
- o Inside Sales Team (auto-populated)

**NOTE:** Some required fields are located on different tabs within the record. For example, the city and state fields are located on the Address tab. You must switch to this tab in order to enter the fields. Sugar provides a warning about missing fields but does not always switch to the field with the missing information.

A full list of required fields for all modules is available in the Appendix of this manual and at [interbayuniversity.com](http://interbayuniversity.com).



**Use the following steps to convert a Lead to a Contact:**

- Step 1:** Click on the Leads tab and use either Basic Search or Advanced Search to locate the lead to be converted.
- Step 2:** Click on the lead name to open the lead in Detail View and click the Convert Lead button above the record.
- Step 3:** Type all the information known about the lead, but at least the required fields (marked with a red star).
- Step 4:** Scroll to the Related Records section and uncheck the box next to "Create Company" to search for an existing company.
- Step 5:** Click the Select button to open the company module in a new window.
- Step 6:** Use either Basic Search or Advanced Search at the top of the pop up window to locate the existing company.
- Step 6a:** If the company name cannot be found within the database, close the company module window and check the box next to "Create Company" within the Related Records panel. Type the company name and any additional information in the fields below.
- Step 7:** Click the Save button. Sugar indicates the actions taken or any errors (such as the detection of a duplicate company).

**NOTES:**

If a duplicate company is found after clicking the Save button, Sugar prompts you to either select the duplicate as the linked company or confirm the creation of a new company.

If you choose to add a loan or activity at the same time as you convert, the Related Activities panel expands to include the base fields for either of these modules. You may choose to return to the Edit View of these records to add more information after converting the lead. The easiest way to do this is to search for the newly converted contact and use the sub-panels to enter the Edit View for loan and/or activities.



## Edit contact (or company) information

As you might expect, editing an existing contact (and associated modules such as company) is easiest within the contact module. Click on the contact tab and use one of the search functions or the List View to locate the record you want to edit. You can also search for the contact using the Global Search function. To enter the Edit View, click the record from the List View or search results and click the Edit button. Alternatively you can go directly to the Edit View by clicking the pencil icon to the right of the target record.

**NOTE:** To enter the Detail View of a record, click on one of the fields appearing as a hyperlink such as the name to view the contact record or the company name to view the company record. Clicking anywhere else within the record (such as the white space around the fields) does not launch the Detail View.

The Detail View of the contact provides a wealth of data at a glance. The first tab holds basic information about the contact such as name, address, phone, etc. It also shows to whom the contact is currently assigned. The rest of the tabs such as Broker Registration, MorVision Info, Broker Profile and Performance contain additional information about the contact like related associations, current loans in production, educational events attended, and past loan performance such as credit rating, etc.

**TIP:** Always add to the information within the other tabs when possible. The more data we have on a broker, the easier it is to build a relationship with that broker. These other tabs are also a good source of questions for future calls with a broker. The data in Sugar is only as good as you make it.

To edit the information on any of the tabs at any time, click the Edit button. Enter any changes and click Save to continue.

**NOTE:** Remember Sugar is an explicit save. You must click Save to retain the information. Any information not saved is lost if you navigate away from the page in any way. Also, Sugar times out after 60 minutes. Any information not saved when you are automatically logged out is lost.



**Use the following steps to edit a Contact:**

- Step 1:** Click on the Contacts tab.
- Step 2:** Use Basic Search to locate the contact.
- Step 3:** Click on the target record to open in Detail View and click the Edit button or from the List View click the pencil icon.
- Step 4:** Make any changes or additions to any of the tabs.
- Step 5:** Click the Save button. The Detail View of the saved record appears.

Remember that when working in modules such as contacts, the Detail View is divided into two main areas. The upper half of the screen is always the primary panel and displays the information from the current record. The lower half of the screen always contains several sub-panels, each of which contains information from one of the other modules in List View.

For example, contact records contain sub-panels for activities, loans, etc. You can turn panels on or off by clicking the double arrow to the left of the sub-panel name. Within each sub-panel, there are also buttons to create a new record even though you are not currently within that module. Also, click on the pencil icon to edit any of the related records appearing in List View within the sub-panel.

In the next two sections: Working with Activities and Working with Loans, we'll actually start creating these types of records from within the contacts module. This ensures the related activity is instantly linked to the appropriate contact.

---

## Summary

1. Always search before creating a new lead or contact.
2. All new contacts within Sugar are initially entered as leads.
3. Leads are converted to contacts (upon the completion of certain required fields).
4. Contacts can be linked to existing companies or a new company can be created when a lead is converted to a contact.
5. Contacts can be edited by clicking the contact name and the Edit button or by clicking the pencil icon within List View.



## C. Working with Activities

Although most of the time you'll be working out of the contact or lead modules, a lot of the new records you'll be creating will be activities. Activities track any and all communications and touch points with your broker contacts, including calls (incoming and outgoing), meetings, emails, faxes, etc.

In this section we'll take a closer look at each activity type as the methods for creating and updating an activity. It's best to access activities from within the contact or lead records. Current activities are located within one of the sub-panels underneath the contact Detail View. (Use the Basic Search or Advanced Search to locate the contact you'd like to call, email, etc.) Completed activities are located in the History sub-panel directly underneath the Activities sub-panel.

### Activity Types

The activities module is designed to provide a detailed account of interactions with a contact. Even calls are sub-categorized by incoming and outgoing. This allows us to closely examine not only the number of touch points required to obtain an application (and subsequently a closed loan) from a broker but the specific type of touch points. As more and more of the data is collected and reviewed we'll be able to better refine our business process and pass this knowledge onto all salespeople.

**TIP:** Remember to add all your activities (even if they seem small or insignificant) into Sugar. Reviewing past activities not only provides context with a contact but when compared with closed loan data provides an indication of what types of activities are more effective. The data in Sugar is only as good as you make it.

Within Sugar there are six primary activity types, each of which has its own button within the activities sub-panel. However, some of these primary activity types are further qualified in some way. For example, calls include a setting to indicate incoming or outgoing. Always use include these extra details when creating activities.

Activity	Required	Uses
Create Task	<ul style="list-style-type: none"><li>• Subject</li><li>• Priority</li><li>• Status</li></ul>	<ul style="list-style-type: none"><li>• Create a record of "to do" type activities.</li><li>• Assign priority and track progress (via status).</li></ul>
Create Meeting	<ul style="list-style-type: none"><li>• Subject</li><li>• Status</li><li>• Duration</li></ul>	<ul style="list-style-type: none"><li>• Create a record of physical meetings with a contact.</li><li>• View all of your current sales-related meetings in the Sugar calendar.</li></ul>
Create Call	<ul style="list-style-type: none"><li>• Subject</li><li>• Status – Outbound /Inbound</li><li>• Duration</li></ul>	<ul style="list-style-type: none"><li>• Create a record of all calls to a contact, providing a history of the account.</li><li>• Track the number of inbound verses outbound calls.</li><li>• Calculate average call length and other duration-related statistics.</li></ul>
Create Comment /Attachment	<ul style="list-style-type: none"><li>• Name</li></ul>	<ul style="list-style-type: none"><li>• Automatically creates in History sub-panel.</li><li>• Make general notes about a contact, such as current marketing strategies or DiSC type.</li></ul>
Compose	(pre-populated)	<ul style="list-style-type: none"><li>• Send emails directly from Sugar.</li></ul>



Email		<ul style="list-style-type: none"> <li>• Use pre-created templates from Marketing.</li> <li>• Response arrives in Notes mailbox (not Sugar).</li> </ul>
Compose Fax	(pre-populated)	<ul style="list-style-type: none"> <li>• Send faxes directly from Sugar.</li> <li>• Use pre-created templates from Marketing.</li> </ul>

**TIP:** Always choose the correct type of activity and avoid simply dumping all activities in the Comments type.

All the activity types appear within the Sugar calendar. You can view all your activities at a glance and when they are do by clicking on the calendar tab.

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## Creating Activities

Always create activities from within the activities sub-panel inside the Detail View of a contact record. This ensures the activity is associated with a specific contact. Within the activities sub-panel are buttons to create any of the main activities types. The data entry screens for each activity type are similar but specific fields differ from one to another. Required fields are always marked with a red asterix.

**NOTE:** Some actions within Sugar, such as saving an activity may take a moment. Three indications the system is working on your task are: 1) movement of the windows icon in the top right of the browser; 2) a web address in the status bar of the browser; 3) a red message (such as "Saving") with gray underlay at the top of the current window.

Some of the activity types, such as task, meeting, call and comment have both a shortened form and a Full Form. By default, the short form appears when you click any of the "create" buttons. Click the Full Form button to expand the form. The email and fax forms only have full forms.

**TIP:** Also located on the Full Form is an option to Close and Create New. This allows you to create several of the same activity without returning to the contact screen. This is a good way to catch up on logging calls or visits for the day.

After you click Save to create or update an activity, you are taken to the Detail View of the current activity record. An alternative way to create a similar activity is the Duplicate button.

Some of the drop downs within the Call and Meeting activities vary depending on your role within Sugar. In particular, the options for inbound and outbound calls differ for internal sales, external sales and the call center. These options are specific to the type of calls these groups typically receive.



**Use the following steps to add a Task:**

*(Make sure you are on the Detail View of a specific contact and the activities sub-panel is open.)*

- Step 1:** Click on the Create Task button within the activities sub-panel.
- Step 2:** Type in at least the Subject (description recommended).
- Step 3:** If necessary, change the Priority and the Status using the drop downs.
- Step 4:** Enter the Due Date and Time and the Start Date and Time (if known). Tip: Use the calendar icon to pick out the dates.
- Step 5:** Click the Save button. Sugar displays the Detail View of the activity.

**Use the following steps to add a Meeting:**

*(Make sure you are on the Detail View of a specific contact and the activities sub-panel is open.)*

- Step 1:** Click on the Create Meeting button within the activities sub-panel.
- Step 2:** Type in at least the Subject (description recommended).
- Step 3:** If necessary, change the Status using the drop down and the Duration by typing the hours and/or selecting the minutes from the drop down.
- Step 4:** Enter the Start Date and Time (if known). Tip: Use the calendar icon to pick out the date.
- Step 5:** Click the Save button. Sugar displays the Detail View of the activity.



**Use the following steps to add a Call:**

*(Make sure you are on the Detail View of a specific contact or lead and the activities sub-panel is open.)*

- Step 1:** Click on the Create Call button within the activities sub-panel.
- Step 2:** Type in at least the Subject (description recommended).
- Step 3:** Select either incoming or outgoing in the first drop down next to Status and choose planned, held or not held from the second drop down.
- Step 4:** Enter the Start Date and Time (if known). Tip: Use the calendar icon to pick out the date.
- Step 5:** Enter the Duration by typing the hours and/or select the minutes from the drop down.
- Step 6:** Click the Save button. Sugar displays the Detail View of the activity.

**Use the following steps to add a Comment or Attachment:**

*(Make sure you are on the Detail View of a specific contact or lead and the activities sub-panel is open.)*

- Step 1:** Click on the Create Comment/Attachment button within the activities sub-panel. The History sub-panel automatically opens (if it's not open already).
- Step 2:** Click the Save button. Sugar displays the Detail View of the activity.



**Use the following steps to send an Email:**

*(Make sure you are on the Detail View of a specific contact or lead and the activities sub-panel is open.)*

- Step 1:** Click on the Compose Email button within the activities sub-panel.
- Step 2:** Use the Select button to the right of the "To:" line to pick out an email address for the recipient (you can also type the address in the "To:" line).
- Step 3:** Type a Subject for the email.
- Step 4a:** To use a pre-created email template, pick a template from the drop down box next to "Use Template." The contents of the template automatically appear in the text editing area. You can toggle between HTML (format-rich) emails and text only emails using the "Send HTML Email" check box.
- Step 4b:** To type an email from scratch, use the text editing area. The commands at the top of the box work similar to Word and other word processing software.
- Step 5:** If necessary, click Add File from File System to attach a document from your hard drive or shared drive or click Add Document from Sugar Documents to attach a document from within Sugar. Both of these buttons create a text area followed by a Browse button. Click on the Browse button to launch a standard Choose File dialog box.
- Step 6:** Click the Send button. Sugar displays the Detail View of the activity.



### Use the following steps to send a Fax:

*(Make sure you are on the Detail View of a specific contact or lead and the activities sub-panel is open.)*

- Step 1:** Click on the Compose Fax button within the activities sub-panel.
- Step 2:** Use the Select button to the right of the "To:" line to pick out a fax number for the recipient (you can also type the number in the "To:" line).
- Step 3:** Type a Subject for the fax.
- Step 4a:** To use a pre-created fax template, pick a template from the drop down box next to "Use Template." The contents of the template automatically appear in the text editing area. You can toggle between HTML (format-rich) emails and text only emails using the "Send HTML Fax" check box.
- Step 4b:** To type a fax from scratch, use the text editing area. The commands at the top of the box work similar to Word and other word processing software.
- Step 5:** If necessary, click Add File from File System to attach a document from your hard drive or shared drive or click Add Document from Sugar Documents to attach a document from within Sugar. Both of these buttons creates a text area followed by a Browse button. Click on the Browse button to launch a standard Choose File dialog box.
- Step 6:** Click the Send button. Sugar displays the Detail View of the activity. Tip: You can also use the Save Draft button to save a draft of the fax to send later.

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### Updating or Closing Activities

Existing activities can be edited or closed. Once an activity is marked as complete, closed or its due date has passed it moves from the activities sub-panel to the history sub-panel (always located directly underneath the activities sub-panel).

**NOTE:** Activities can only be deleted within the Detail View of the record using the Delete button. The small "x" to the left of activity in List View closes (and completes) the activity, moving it to the History folder. It does not delete the activity. Also, the "rem" icon to the right in List View severs the relationship between the activity and the current contact or lead. It does not delete the activity.

You can edit any existing activity by clicking the pencil icon or clicking on the activity from either the activities sub-panel or the history sub-panel and clicking the Edit button. Type in any changes and click the Save button to update the record. Delete an activity



using the Delete button within Edit mode. Close an activity by clicking on the large "X" to the left of the record you want to close. This also moves the activity into history.

**TIP:** When viewing activities or any other record in Detail View use the "View Change Log" to review a list of changes previously made to the record.

**Use the following steps to update an Activity:**

*(Make sure you are on the Detail View of a specific contact or lead and the activities sub-panel is open.)*

**Step 1:** Click on the pencil icon to the right of the target record from within the List View of the activities sub-panel.

-or-

**Step 1:** Click on the name of the target activity to enter the Detail View of that record.

**Step 2:** Click the Edit button.

**Step 3:** Make any changes or additions to the activity record.

**Step 4:** Click on the Save button to update the record. Sugar displays the record in Detail View.

**Use the following steps to close an Activity:**

*(Make sure you are on the Detail View of a specific contact or lead and the activities sub-panel is open.)*

**Step 1:** Click on the large "X" to the left of the target record from within the List View of the activities sub-panel. Sugar displays the activity in Detail View and automatically changes to the status to the appropriate setting (complete, held, etc.)

**Step 2:** Click on the Save button to update the record. Sugar returns to the List View within the activities sub-panel. The closed record is now located in the history sub-panel.



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## Summary

1. Always create an activity using the activities sub-panel within a specific contact.
2. Within Sugar there are six main activity types: task, meeting, call, comment, email and fax. Buttons to create all of these activities types are located within the activities sub-panel.
3. Tasks, meetings, calls and comments have both a basic form and a full form for data entry.
4. Emails and faxes can be sent directly from Sugar. Several pre-created templates are available for each.
5. Use the pencil icon to edit existing activities, the "X" to close activities and the "rem" icon to delete existing activities.
6. Once closed, activities are moved to the history sub-panel.



## D. Working with Loans

One of the key changes in Sugar is the integration of loan functionality into the CRM system. In the past information about current applications and loans were pushed from MorVision into ACT. However, the loan process itself began with the submission of a Gold Sheet. Loans are now entered directly into Sugar, with the loan module replacing the Gold Sheet to capture initial information.

Always enter loans from within a contact record on the loans sub-panel. (Loans can only be linked to converted contacts. You must convert a lead to a contact before the record can be linked to a loan.) You can either Save or Submit a loan. Save simply updates the record's information in Sugar. Submit begins the loan process in MorVision. Once you submit a loan, it can no longer be edited in Sugar. Submission also requires more fields than simply saving. For a complete list of the required fields for saving and submission see the Appendix.

Once the loan is submitted a loan opener starts the loans file. From this point on all messages, notes and other actions taken on the loan should all be recorded within MorVision. These messages are reflected in Sugar within the history sub-panel on the loan's Detail View.

As the loan moves through processing, MorVision provides Sugar with updated information (These updates are "read only." Once a loan is submitted all maintenance occurs in MorVision.). This information includes:

- MorVision ID Number
- Loan Amount (if it changes)
- Current Status

### Use the following steps to create a Loan:

*(Make sure you are on the Detail View of the target contact and the loan sub-panel is open.)*

**Step 1:** Click the Create button with the loan sub-panel.

**Step 2:** Enter as much information into the form as possible but at least the required fields (marked with a red "\*"). To apply discounts within the rates area, use a (-) minus sign next to the number.

**Step 3:** Click on the Save button. After saving the loan Sugar returns to the contact Detail View. The new loan is visible in the loan sub-panel.

**Step 4:** When the loan is ready to be sent to opening, return to the Detail View of the loan and click the Submit button. Once a loan is submitted it cannot be changed. You are prompted to print the loan to submit to processing. Once the loan is printed it's physically delivered to the opener who enters the loan into MorVision.



Once a loan is entered into Sugar, you can always check the status and messages within the loan either by looking up the contact and scrolling to the loan sub-panel or by searching for the loan within the loan module.

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### Summary

1. Loans are initially entered in Sugar with the loan sub-panel of the related contact.
  2. Loans can only be linked to converted contacts (not leads).
  3. Once a loan is created, all loan-specific messages, comments, etc. should be entered in MorVision. This information can be viewed in the history sub-panel of the loan within Sugar.
- 



## ***Appendix – Required Fields***

### **Leads**

- Last Name
- Lead ID (auto-populated)
- Assigned To (auto-populated)
- Inside Sales Team (auto-populated)

### **Contacts**

- First Name
- Last Name
- Company Name
- Office Phone
- City
- State
- Contact ID (auto-populated)
- Assigned To (auto-populated)
- Inside Sales Team (auto-populated)

### **Companies**

- Company Name
- Office Phone
- City
- State
- Zip Code
- Company ID (auto-populated)
- Assigned To (auto-populated)
- Inside Sales Team (auto-populated)

### **Calls**

- Related To (auto-populated)
- Status
- Subject
- Regarding
- Start Date & Time
- Duration
- Results (Call Center only)
- Assigned To (auto-populated)
- Inside Sales Team (auto-populated)



## Meetings

- Related To (auto-populated)
- Subject
- Regarding
- Start Date & Time
- Duration
- Assigned To (auto-populated)
- Inside Sales Team (auto-populated)

## Tasks

- Related To (auto-populated)
- Subject
- Status
- Regarding
- Priority
- Assigned To (auto-populated)
- Inside Sales Team (auto-populated)

## Comments

- Related To (auto-populated)
- Subject
- Inside Sales Team (auto-populated)

## Email

- Related To (auto-populated)
- Assigned To (auto-populated)
- Inside Sales Team (auto-populated)

## Fax

- Related To (auto-populated)
- Assigned To (auto-populated)
- Inside Sales Team (auto-populated)



## Loans

- Assigned To (auto-populated on Save and Submit)
- Inside Sales Team (auto-populated on Save and Submit)
- Company Name (on Save and Submit)
- Company ID (auto-populated from Company name on Submit)
- Contact Name (on Save and Submit)
- Contact ID (auto-populated from Contact name on Submit)
- Borrower First (on Submit)
- Borrower Last (on Save and Submit)
- Date of Credit Report (on Submit)
- Name of Corporation if closing in a corporate name checked
- Property Address 1 (on Submit)
- City On Submit
- State On Submit
- Zip Code On Submit
- Property Type On Submit
- Property Tier On Submit
- Requested Loan Amount (on Save and Submit)
- Loan Purpose On Submit
- Purchase Price/Est Value (on Submit)
- Loan Program On Submit
- Requested Term (on Submit)
- Loan Status (on Save and Submit)
- Loan Name (auto-populated on Save and Submit)
- Sugar Loan ID (auto-populated on Save and Submit)
- Office (on Submit)
- ILO (on Submit)



## *Summary of Mobile Connectivity*

Sugar includes a limited view of records on a mobile platform such as the Blackberry. Basic information such as name, address, email and phone number is viewable. Full Detail Views are not available. Limited creation and editing is also possible for leads, contacts and companies.

Existing activities can be edited but not created. For example, if you prefer to enter information about a meeting immediately following the meeting, you'll have to create the meeting activity beforehand while still on a laptop. You'll then be able to access and add to the description of the meeting while on the road.

Sugar's mobile connectivity tends to work best for looking up information such as address and phone number or keeping track of existing activities such as task-based "to do" lists. It is not possible to perform all the required record maintenance within the mobile environment. You can also add new leads.



## *Hand on Exercises*

### **Contents:**

- Exercise 1 – Vocabulary Matching
- Exercise 2 – Login and Find a Record
- Exercise 3 – Look Up Record Detail
- Exercise 4 – Create and Save a Search
- Exercise 5 – Perform Record Maintenance
- Exercise 6 – Update Activities
- Exercise 7 – Track Loans
- Exercise 8 – Run and Print a Report
- Exercise 9 – Customize Your Display
- Exercise 10 – View Your Pipeline



## Exercise 1 – Vocabulary Matching

<b>Goal</b>	Demonstrate the differences between key terms used within the Sugar CRM.
<b>Scenario</b>	Match the Sugar-related vocabulary words with the definition of each.
<b>Time</b>	10 minutes
<b>Instructions</b>	Fill in the letter of the matching definition in the blank box to the left of each of the vocabulary words below.

C	Activity	A	Used to record observations about a contact.
A	Comments	B	Contain functionality related to a specific record type within Sugar.
G	Sub-panel	C	Specific touch point or communication with a contact or lead within Sugar.
F	Lead	D	Display information related to the current module.
B	Module	E	Holds legacy information from ACT.
D	Panel	F	An unqualified contact.
H	Record	G	Display information from modules that are linked to the current module.
E	Comment	H	Information containers within Sugar that contain several fields of data.



## Exercise 2 – Login and Find a Record

<b>Goal</b>	Demonstrate the ability to log into Sugar and retrieve a record.
<b>Scenario</b>	Login to Sugar and retrieve a contact name to make an ongoing call.
<b>Time</b>	10 minutes
<b>Instructions</b>	Follow the steps in the table below. Use the Job Aids handed out in class. If you have difficulty, raise your hand and an instructor will assist you. Record your results and be prepared to share your results within the other participants.

Step	Instructions	Question	Results
1	Open your internet browser and go the Sugar login screen.	What is the title of the current website?	localhost
2	Login to Sugar using your username and password.	What information shows by default?	Contacts
3	Use the global search function to find the <b>Vandelay</b> lead.	What is the current phone number?	555-867-5309
--	<i>Bonus:</i>	<i>What is the quickest way to place a call to this lead?</i>	<i>Click the phone number for click to dial.</i>



### Exercise 3 – Look Up Record Detail

<b>Goal</b>	Demonstrate the ability to retrieve information from the Detail View of a record.
<b>Scenario</b>	Look up the state licensing information for an existing contact.
<b>Time</b>	10 minutes
<b>Instructions</b>	Follow the steps in the table below. Use the Job Aids handed out in class. If you have difficulty, raise your hand and an instructor will assist you. Record your results and be prepared to share your results within the other participants.

Step	Instructions	Question	Results
1	Switch to the Contacts module.	How are the contacts sorted in List View?	Broker last name
2	Use the global search function to look up the record for <b>John Smith</b> .	How many John Smiths are in the database?	4
3	Open the Detail View for the <b>John Smith at Liberty Funding, Inc.</b>	What states is John Smith currently licensed in?	NJ, PA, MD
--	<i>Bonus:</i>	<i>When was the last call placed to John Smith?</i>	<i>September 2, 2007</i>



## Exercise 4 – Create and Save a Search

<b>Goal</b>	Demonstrate the ability to use the advanced search function of Sugar and save the search for later use.
<b>Scenario</b>	Save a search that retrieves all of the direct mail leads within Pennsylvania, New Jersey and Delaware, sorted by company name and showing name, company name, phone number and email.
<b>Time</b>	10 minutes
<b>Instructions</b>	Follow the steps in the table below. Use the Job Aids handed out in class. If you have difficulty, raise your hand and an instructor will assist you. Record your results and be prepared to share your results within the other participants.

Step	Instructions	Questions	Results
1	Switch to the Leads module.	What fields are available in Basic Search?	First name, last name, any phone and company name
2	Perform an Advanced Search based on the following criteria: <ul style="list-style-type: none"> <li>Lead source=direct mail</li> <li>State = PA, NJ, DE</li> </ul>	How many records are returned?	TBD
3	Create a saved search that returns the following results in ascending order by company name: <ul style="list-style-type: none"> <li>Name</li> <li>Company name</li> <li>Phone number</li> <li>Email</li> </ul>	A. How many columns are hidden?  B. Where does the name of your search move to after you click Save?	A. 30  B. Previously Saved Searches
	Bonus:	What steps would be necessary to modify the search to sort by name and save it?	Change "Order by Column" to "Name" and click the Update button.



## Exercise 5 – Create and Convert a Lead

<b>Goal</b>	Demonstrate the ability to create a lead and convert it to a contact.
<b>Scenario</b>	During a cold call to a broker shop you spoke with a broker who recently joined the company. He would like to learn more about commercial lending.
<b>Time</b>	10 minutes
<b>Instructions</b>	Follow the steps in the table below. Use the Job Aids handed out in class. If you have difficulty, raise your hand and an instructor will assist you. Record your results and be prepared to share your results within the other participants.

Step	Instructions	Questions	Results
1	Create a new lead and enter the following information: <ul style="list-style-type: none"> <li>• First Name = [Name of your first pet]</li> <li>• Last Name = [Mother or father's first name]</li> <li>• Phone = 555-[any number]</li> </ul>	A. What is the quickest way to open the "create lead" screen?  B. What two additional fields were populated?	A. Scroll over the shortcuts menu and click "Create Lead."  B. Lead ID, Status
2	Convert the lead using the following additional information: <ul style="list-style-type: none"> <li>• Company name = Liberty Funding</li> <li>• City = Springfield</li> <li>• State = FL</li> </ul>	A. What two pieces of required did you already have?  B. Does Liberty Funding match an existing company?  C. What two messages are provided by Sugar?	A. First name, phone number  B. Yes, Liberty Funding, LLC.  C. "Created a new contact," "Used an existing company"
	<i>Bonus:</i>	<i>What two messages would have appeared if you had to create a new company?</i>	<i>C. "Created a new contact," "Created a new company"</i>



## Exercise 6 – Update a Record

<b>Goal</b>	Demonstrate the ability to update information within contacts and other records.
<b>Scenario</b>	The broker you added in the previous exercise calls with some questions regarding the interest guarantee. During the conversation he provides additional information about himself and the company.
<b>Time</b>	10 minutes
<b>Instructions</b>	Follow the steps in the table below. Use the Job Aids handed out in class. If you have difficulty, raise your hand and an instructor will assist you. Record your results and be prepared to share your results within the other participants.

Step	Instructions	Questions	Results
1	Open the contact you created in the previous exercise in Detail View.	A. What is the quickest way to open the contact?  B. What is the lead date on the record?	A. Click the name of the contact from the Last Viewed bar.  B. Today's date
2	The broker indicates the first heard about InterBay at a conference. Update his record accordingly.	A. What tab contains this information?  B. What new link is added at the top of the record?	A. Lead Source  B. View Change log
3	The broker would like his address to be the same as the company. Update his record accordingly.	What is the most efficient way to make this change?	Under contact primary address, click "Update primary address from company."
	<i>Bonus:</i>	<i>While on the call, the broker provides a new fax number for the company. How can you quickly navigate to the company record?</i>	<i>Use the company name link on the right side next to "Converted company."</i>



## Exercise 7 – Create an Activity

<b>Goal</b>	Demonstrate the ability to create an activity linked to a specific contact or lead.
<b>Scenario</b>	Record the broker call mentioned in the previous exercise.
<b>Time</b>	10 minutes
<b>Instructions</b>	Follow the steps in the table below. Use the Job Aids handed out in class. If you have difficulty, raise your hand and an instructor will assist you. Record your results and be prepared to share your results within the other participants.

Step	Instructions	Questions	Results
1	Open the contact you created in the previous exercise in Detail View.	A. How many sub-panels are available?  B. What is the first sub-panel listed?	A. 7  B. Activities
2	Open the sub-panel and create a new call activity using the short form. Keep today's date but change the time to one hour earlier. Be sure to mark the status as complete.	A. Should the call be marked inbound or outbound?  B. Where does the created record appear? Why?	A. Inbound  B. History. Because this activity has been completed.
	<i>Bonus:</i>	<i>If you forgot to change the status of this activity when creating it, what's the quickest way to mark it complete?</i>	<i>Use the close icon ("x") at the left of the activity record in List View.</i>



## Exercise 8 – Update an Activity

<b>Goal</b>	Demonstrate the ability to create an activity linked to a specific contact or lead.
<b>Scenario</b>	Update the call record created in the last exercise to reflect additional information about the content of the call.
<b>Time</b>	10 minutes
<b>Instructions</b>	Follow the steps in the table below. Use the Job Aids handed out in class. If you have difficulty, raise your hand and an instructor will assist you. Record your results and be prepared to share your results within the other participants.

Step	Instructions	Questions	Results
1	Open the contact you created in the previous exercise in Detail View.	Is the Activities sub-panel open or closed? Why?	Open. This contact now has an associated activity.
2	Open the call activity you created in the previous exercise and add a description: "Explained the reasons behind the interest guarantee program. Broker will need assisted explaining this feature to the borrower."	A. From which sub-panel did you access the record?	A. History
	<i>Bonus 1:</i>	<i>What other types of information should be recorded in activity descriptions?</i>	<i>Varies – expanded call purpose, qualifying comments, broker requests, unresolved issues/questions, DISC notes, etc.</i>
	<i>Bonus 2:</i>	<i>Where would you record action items such as follow-up calls, items to send, etc.?</i>	<i>Tasks</i>



## Exercise 9 – Create and Check the Status of a Loan

<b>Goal</b>	Demonstrate the ability to create a Loan and check on its status through Sugar.
<b>Scenario</b>	The broker from the previous exercises has submitted a loan application for \$325,000. His borrower would like a close date 90 days from today.
<b>Time</b>	10 minutes
<b>Instructions</b>	Follow the steps in the table below. Use the Job Aids handed out in class. If you have difficulty, raise your hand and an instructor will assist you. Record your results and be prepared to share your results within the other participants.

Step	Instructions	Questions	Results
1	Open the contact you created in the previous exercise in Detail View and bring up the loan entry form.	How many fields are required?	5
2	Create the loan using the information in the scenario above.	What screen do you return to after saving the loan on the short form? On the full form?	Short Form – Contact Detail View. Long Form – Loan Detail View.
3	Check the current status of the loan.	A. From what view can you check status?  B. What sub-panel holds notes from MorVision?	A. Loan Detail View  B. History sub-panel
	<i>Bonus 1:</i>	<i>Where would you add future comments and updates about this loan?</i>	<i>MorVision</i>



## Final Exercise – From Lead to Loan

<b>Goal</b>	Demonstrate the ability to use the various functions of Sugar together to complete the client lifecycle from unqualified lead through the first loan submission.
<b>Scenario</b>	Your manage passes on a lead from a recent trade show. Unfortunately the broker was out of business cards so all you have is a last name and (luckily) a phone number. You'll need to call to qualify the lead and eventually convert it to a contact. During the call the broker requests you send him the matrix and asks if a BDM can visit to discuss marketing options. Eventually the broker submits their first loan.
<b>Time</b>	10 minutes
<b>Instructions</b>	Follow the steps in the table below. Use the Job Aids handed out in class. Record all the steps you take for each task by writing them in the "My Steps" column. Hand in your exercise to the instructor when finished.

Task	Instructions	My Steps
1	<p>Create a lead based on the following information:</p> <ul style="list-style-type: none"> <li>Last Name = first name of the person to your right</li> <li>Phone number = 555-123-(your birthday)</li> </ul>	
2	Create an activity based on the initial call to gather more information about the broker.	
3	<p>During the call you learn they are with a company not in our database and that they current have a commercial deal. Convert the lead using the following:</p> <ul style="list-style-type: none"> <li>First Name – (any)</li> <li>Last Name – (same as above)</li> <li>Company Name – (your last name + "Mortgage Inc." or "Financing, LLC")</li> <li>Office Phone – (same as above)</li> <li>State – (any)</li> </ul>	
4	<p>During the call the broker requests you send them a Matrix next week and have a BDM visit them. Create activities for both of these actions.</p>	



Task	Instructions	My Steps
5	<p>The broker sends in the commercial deal. Create a loan based on the following:</p> <ul style="list-style-type: none"> <li>• Loan name = (any)</li> <li>• Expected close date = 70 days from today</li> <li>• Requested loan amount = \$274,000</li> </ul>	

Final Questions		Answers
1	How many total records did you create in Sugar?	6 (counting the lead); 5 (counting the contact and lead together)
2	What type of an activity did you create for sending the Matrix? Why?	Task (because the activity is requested for next week)
3	How many different modules did you work with to perform all the tasks?	4 primary (Bonus: 7 if you count calls, meetings and tasks separately)
4	What module did work out of the most? Why?	Contacts. All other work can be launched from sub-panels
5	How many other InterBay personnel would have been involved with this workflow?	3 (the manager with the initial lead, the BDM, and the loan opener)



## TRAINING EVALUATION

SAL 190 – Using Sugar CRM

Your Name (optional): \_\_\_\_\_

Today's Date: \_\_\_\_\_

Class Name: \_\_\_\_\_

Please circle the number that best represents your opinion on items 1-11 and give us your opinion on questions 12-14. Your feedback will help us refine and improve our training course offering. When you have completed the evaluation, return it to your instructor.

<b>This Course...</b>	<b>Strongly Disagree</b>										<b>Strongly Agree</b>	
1. Successfully prepared you to perform your work task.	1	2	3	4	5	6	7	8	9	10	N/A	
2. Was the course the right length. If Disagree: Too Short or Too Long	1	2	3	4	5	6	7	8	9	10	N/A	
3. Had learning objectives that were clearly stated at the beginning and were met during the session.	1	2	3	4	5	6	7	8	9	10	N/A	
4. Flowed logically from one topic to the next.	1	2	3	4	5	6	7	8	9	10	N/A	
5. Training materials will provide a suitable reference.	1	2	3	4	5	6	7	8	9	10	N/A	
6. Used exercises that were valuable.	1	2	3	4	5	6	7	8	9	10	N/A	

<b>My Instructor...</b>	<b>Strongly Disagree</b>										<b>Strongly Agree</b>	
7. Conducted the class at an appropriate pace.	1	2	3	4	5	6	7	8	9	10		
8. Explained concepts clearly.	1	2	3	4	5	6	7	8	9	10		
9. Is knowledgeable of product.	1	2	3	4	5	6	7	8	9	10		
10. Provided opportunity for and openness to questions.	1	2	3	4	5	6	7	8	9	10		
<b>11. Overall Rating of the Training</b>	1	2	3	4	5	6	7	8	9	10		

12. What was the best part of the class? \_\_\_\_\_  
\_\_\_\_\_

13. Is there anything we could do to improve this class? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

14. Please list two things that you feel you have learned from this class: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*Thank you for taking the time to give us your input.*