



Marketing Manager for SugarCRM

Overview: SierraCRM, Inc. has released Marketing Manager 1.0 for SugarCRM. This powerful Marketing Campaign Management module compliments Sugar's open source offering by extending the concept of a Customer for Life. This new module allows SugarCRM customers the capability to streamline and automate many of their daily tasks involved with customer acquisition, management and retention, allowing users of SugarCRM to focus on selling and servicing customers in the most effective and automated manner.

Product Specifics: Marketing Manager 1.0 allows users of SugarCRM the capability to build automated Marketing Campaigns that can be setup to run daily, weekly, or monthly. A powerful query tool is included to allow the user to create easy to complex queries against Sugar Contacts, Leads, Accounts, Opportunities and Cases. For example, the automated sending of an email on a contacts birthday is a simple Marketing Campaign that can be setup in just minutes with Marketing Manager. More complex Campaigns, such as a Campaign that informs a SugarCRM user of all Opportunities that are due to close the following week can be easily built. Marketing Manager consists of three key components:

- **The Marketing Manager Campaign**
This is the main module and holds the name of the Marketing Campaign and the frequency and status. You can setup Marketing Campaigns to run daily, weekly or monthly. Additionally, you can setup a manual Marketing Campaign that is run only when you want it to run. The Marketing Campaign modules will show the total number of Contacts, Leads or Accounts that are included in the Prospect List, additionally the 'Last Run Date' of the Campaign is shown on the Detail View.
- **The Marketing Manager Query**
The Marketing Query module is the key component to the Marketing Manager. The query you build determines the result of the Prospects, be they Contacts, Leads or Accounts. The query module allows you to build queries as simple as selecting all Contacts, Leads or Accounts. In addition, you can build a query using a broad set of date variables to narrow down the prospect list on date fields. For example, you can build a campaign where the query is to find all Contacts whose birthday is today. A more complex query would be to find all Opportunities where the close date is scheduled for the following week and the stage is not 'Closed Won'. As you build the query, you are presented with a series of drop down lists that help you select the fields, operators and values. A second query is included to allow you to create a join query between two tables.

- **The Marketing Manager Action**

The Marketing Action is the final module in the Marketing Manager. This module is where you select the action you would like the campaign to do. You can select one of the following actions:

- i. Send an Email
- ii. Schedule a Call
- iii. Create a Sugar Task
- iv. Run a SierraCRM Process in Process Manager

Sending an Email: Emails are sent using Templates that you create in Sugar's Email Templates module. The email is sent to the email address on the Contact, Lead or Account.

Scheduling a Call: Calls are scheduled with the Due Date being a delay you set when you create the Action.

Creating a Task: SugarCRM Tasks can be created for the Contact, Lead, or Account. The Start Date of the Task is set using the delay when you create the Action.

Technical Overview: Marketing Manager is an upgrade safe custom module that is loaded via the SugarCRM Module Loader. Included in the distribution are the core module files that are part of a SugarCRM module. In addition, there are numerous helper and utility php scripts that are core to the Marketing Manager. During the installation of the Module, additional tables are added to support the Marketing Manager.

Marketing Manager runs as a background process via Linux Cron jobs or Windows Schedule Task.

About the Company:

SierraCRM, Inc was formed in June of 2004 to deliver innovative and powerful enhancements for SugarCRM. Founded by experts in both AmdocsCRM and SugarCRM, SierraCRM's value proposition is to deliver products that automate many of the daily tasks associated with acquiring, processing, and marketing to prospects or customers. SierraCRM products include the award winning Process Manager, Marketing Manager and Routing Manager.

To contact the company, please call SierraCRM's Sales Office at: 530-272-3064; or visit the company website: www.sierracrm.com