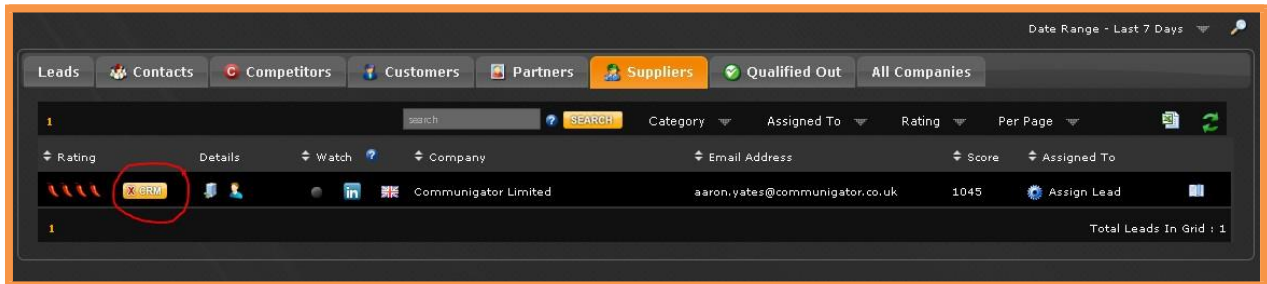


# Sugar CRM Integration

## Background

Your WOW account can be activated to have a CRM button next to each company lead as in the diagram below.



This button goes to your Sugar account to find if the company lead already exists as one of your Sugar accounts. This is done through the standard Salesforce API. The button has 3 states dependent on the actions you take for each company lead.



This company lead has NOT been checked against Sugar.



This company lead has been assigned as a new LEAD in Sugar.



This company lead has not be actioned against CRM yet.

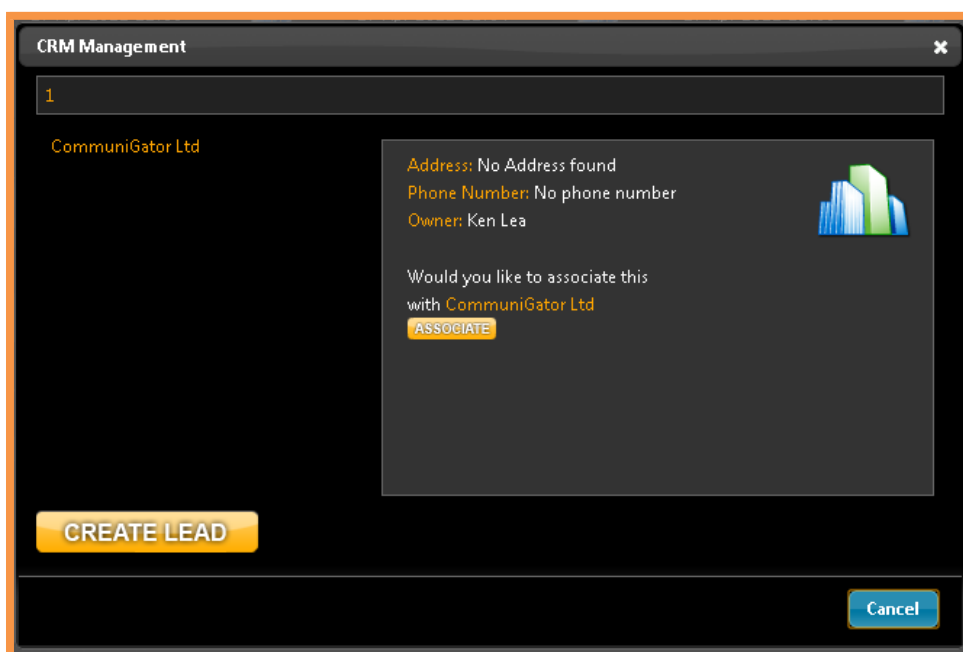
Once the button is clicked there are 2 actions available dependent on whether the company lead exists in CRM or not.

- 1) If the company lead does not match to an existing Sugar account, WOW will offer the below screen for you to create a Sugar lead like below.



The Sugar lead will be created with the Company name, a lead source value of 'Wow Analytics' and a permalink will be added. The permalink is a url that when clicked will bring up a browser window of the Company lead full details in WOW so you can see the historical clicks of the this company.

- 2) If the company lead does match to one or many existing Sugar accounts (the matching uses a like/fuzzy match so any similar accounts will come back), then you will see address phone and owner details and have the ability to either:
  - a. Associate this company lead in WOW to a CRM account – no further action is taken except the CRM button changes to let any users know this account has already been matched. You will be able to choose if many company matches available on which to associate.
  - b. Create yourself a new lead as the companies match are not correct.



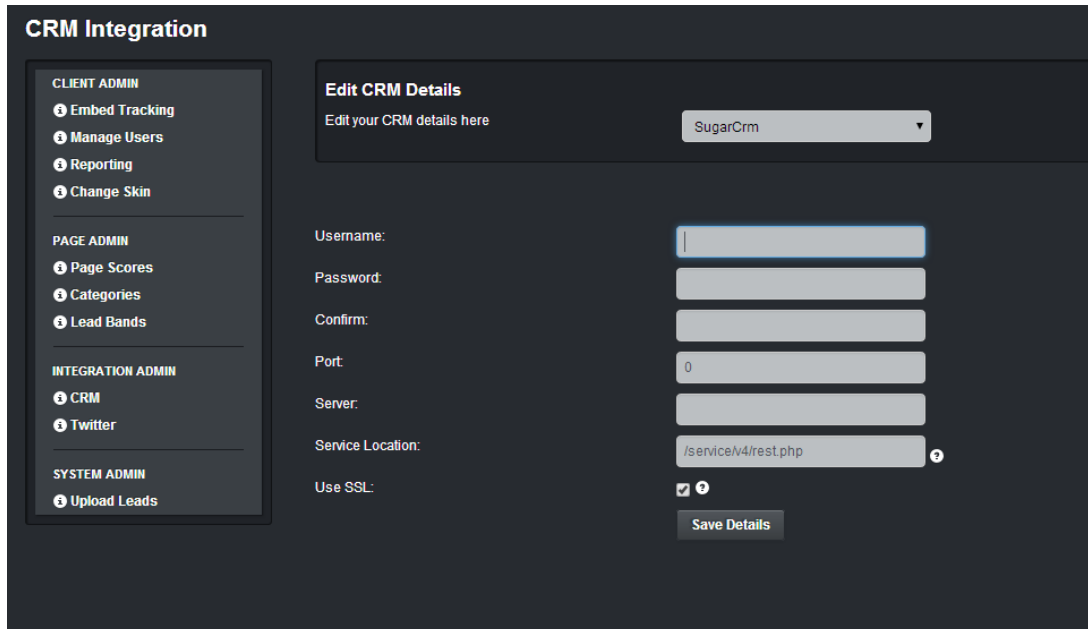
## Setup

To set up your WOW account to integrate with Sugar, you will require the following prerequisites:

- 1) Sugar API access
- 2) A single Sugar account with
  - a. Sugar Username
  - b. Sugar Password
- 3) Sugar API server details and port

Now you have the required security token login to your WOW account as an admin user, go to admin/CRM Integration, choose 'Sugar from the dropdown and enter your Sugar details for :

Username, Password and Server.



Update the details and now your account will be set up. Going back to the main WOW lead screen you will see the CRM button now ready against your company leads.

Sugar Integration complete, any questions then please contact your WOW support.