
wReferrals User Guide

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wReferrals User Guide

Overview

If you have different sales teams handling your product and services or sending referrals to business partners, wReferrals is a tool that helps you simplify and automate the product and service Referral process. wReferrals for Sugar is a paid add-on that enables you to refer records internally, from one Sugar user to another, or externally, sent to sources outside of your Sugar instance. Based on the referral's source (internal or external), wReferrals can either send a notification in Sugar to the receiving user or send an email message to the external source.

This guide covers how administrators and users can engage with the wReferrals plug-in after it has been installed to your Sugar instance. For more information on installing wReferrals, please refer to the [W-Systems Product Installation Guide](#).

Note: This guide pertains to the latest release of wReferrals. If you are not using the latest version, then you may not have access to some of the features listed on this page. Please refer to the [W-Systems Supported Platforms](#) page for more information on the latest package versions.

Features

- [Create Internal Referrals](#): wReferrals enables you to refer records internally, from one Sugar user to another. Any internal referral automatically links to the record's Account and Contact, so the receiver has immediate access to it when receiving the referral notification.
- [Send External Referrals](#): External referrals are sent to sources outside of your Sugar instance. When created, an email notification is sent to the receiver. You can also include URLs to the records in Sugar if the receiver has access to your CRM instance.
- [Receive Notifications](#): Based on the referral's source (internal or external), wReferrals can either send a notification in Sugar to the receiving user or send an email message to the external source.
- **Track Referrals**: wReferrals adds a custom module in Sugar where you can view all of your referral records or filter them by any criteria. Sugar also enables you to view the Referrals module's data in a dashboard.

wReferral Administration

- [Configuring the Create Referral Buttons](#)




- [Configuring the Create Referrals Types](#)

Configuring the Create Referral Buttons

Button should be placed in each record's header of Accounts and Contacts modules. This can be achieved by using the new field type created by **wRecordButtons** package. To configure the **Referral Button's** color, text and text style, the user needs to go to the **Administration** page, on the **Developer Tools** panel. Select the **Studio** link available there.

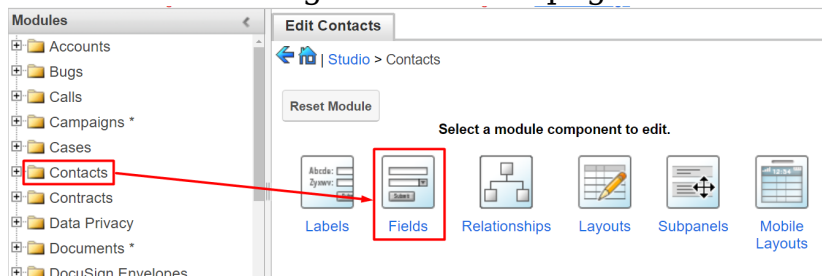
Developer Tools

Create and edit modules and module layouts, manage standard and custom fields.

| | |
|--|--|
|  Studio | Customize module fields, layouts and relationships |
|  Module Builder | Build new modules to expand the functionality of Sugar |
|  Module Loader | Add or remove Sugar modules, themes, language packs and other extensions |

In this example, we will configure the **Create Referral Button** for the **Contacts** module. Proceed the same for the **Accounts** module.

1. In **Studio**, select the **Contacts** module and then choose the **Fields** option available on the right side of the page.



2. Set the **Data Type** to **wRecordButtons**.

Edit Fields
Edit Field ×

Save
Cancel

Data Type: wRecord Buttons ?

Button Set Name:

Button Set Label:

System Button Set Label:

Button Configuration:
Configure

3. Set the **Button Set Name** to `create_referral` and the **Button Set Label** to `Create Referral`.

Save Cancel

Data Type: wRecord Buttons ⓘ

Button Set Name: create_referral

Button Set Label: Create Referral

System Button Set Label: LBL_WRB_CREATE_REFE

Button Configuration:

4. Click on the **Configure** button next to the **Button Configuration** field to set an action for the **Create Referral** Button. Sugar will take you to a new **Configuration** page for the button.

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents Emails Camp

Buttons Type: Dropdown Button Size: Default Icon Placement: Left Show In Header: Show Field Label: Cancel Save

+ Button x it Show Icon

General Settings ^

Icon: COG Color Scheme: Inverse Button Color

Icon Color: Black Show Icon:

Label: Button Show Label:

Dependent: Description:

Action Configuration x ^

Action: Create Record ⓘ

Record Type: UPC_Referrals Link Record: Copy Parent Values:

5. In the **Action Configuration** Subpanel set the action for the button to **Create Record**.

Action Configuration

Action: ⓘ

6. From the **Record Type** drop-down menu, select **Referral**.

Record Type

UPC_Referrals

re

Referral

Referral Type

Report

Revenue Line Item

wDocsMergeRequest

7. Press **Save**. After saving your configuration for the **Create Referral** button, you will be returned to the **Edit Field** page in **Studio**.

Buttons Type Button Size Icon Placement Show In Header

Dropdown Default Left Cancel Save

+ Row Field Label Hide on Edit Show Icon

General Settings Add Action

Icon COG Color Scheme Inverse Button Color

Icon Color Black Show Icon

Label Button Show Label

8. **Save** your field configuration.

Edit Fields Edit Field

Save Cancel

Data Type: wRecord Buttons

Button Set Name: create_referral

Button Set Label: Create Referral

System Button Set Label: LBL_WRB_CREATE_REF

Button Configuration: Configure

After saving your configuration, a new field will be added to the **Edit Fields** panel in **Studio**:

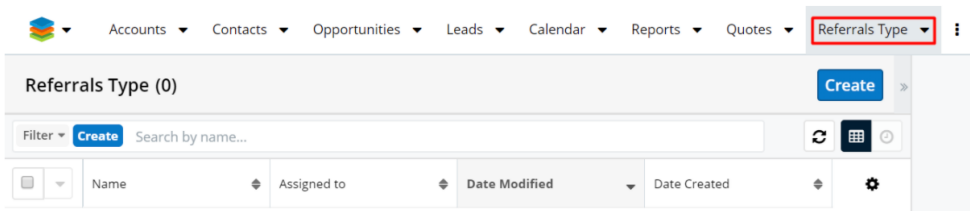
| Edit Fields | | |
|--------------------------|---------------------------------|-----------------|
| portal_password | Password | Password |
| portal_app | Portal Application | TextField |
| portal_user_company_name | Portal User Company Name | TextField |
| preferred_language | Language Preference | DropDown |
| cookie_consent | Cookie Consent | Checkbox |
| cookie_consent_received | Cookie Consent Received On | Datetime |
| dp_business_purpose | Business Purposes Consented for | MultiSelect |
| dp_consent_last_updated | Consent Last Updated | Date |
| mkto_sync | Sync to Marketo® | Checkbox |
| mkto_id | Marketo Lead ID | Integer |
| mkto_lead_score | Lead Score | Integer |
| email | Email Address | Email |
| * create_referral_c | Create Referral | wRecord Buttons |

Note: Make sure to enable the **Show on Header** feature when configuring the button in Administration, to easily use the button from a Contact's Record View header.

Buttons Type: Buttons | Button Size: Default | Icon Placement: Left | Show In Header: | Cancel | Save

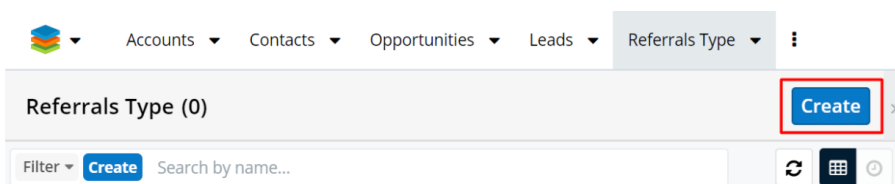
Configuring the Create Referral Types

The **Referral Type** module is a new custom module that allows users to define the available products and services to refer to: **Internal** or **External**. Users can route the referral to a record in the **Accounts** or **Contacts** modules, with a description of the product or service.



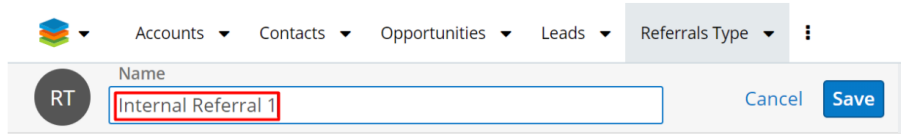
Create Internal Referral

To create a new Internal Referral, click on the **Create** button available on the **Referral Type** module.



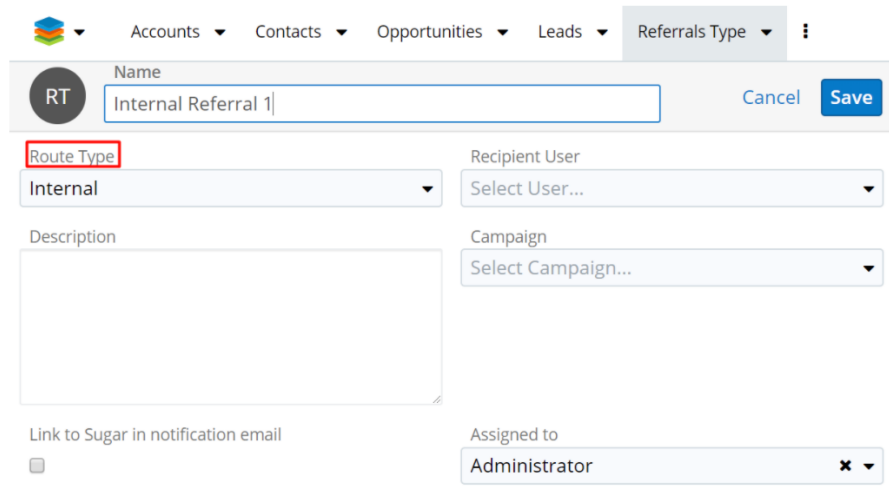
This will open a new Sugar page where users can configure their Internal referrals.

- **Name:** this text field allows users to give their referral type a name.



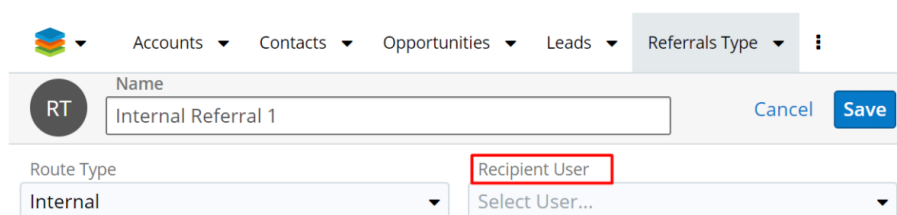
The screenshot shows the top navigation bar with 'Accounts', 'Contacts', 'Opportunities', 'Leads', and 'Referrals Type' menus. Below is a form with a 'Name' field containing 'Internal Referral 1', which is highlighted with a red box. There are 'Cancel' and 'Save' buttons to the right of the field.

- **Route Type:** this drop-down field allows users to set if the referral is internal or external of the currently used Sugar instance. By default, the value of the field is Internal.



The screenshot shows the 'Referrals Type' configuration form. The 'Route Type' dropdown is set to 'Internal' and is highlighted with a red box. Other fields include 'Recipient User' (Select User...), 'Campaign' (Select Campaign...), 'Description' (text area), 'Link to Sugar in notification email' (checkbox), and 'Assigned to' (Administrator).

- **Recipient User:** this drop down/Search field allows users to select the Sugar user to which the record will be Referred To. When the search function is used, a new drawer with all Sugar users will open. Select the user.



The screenshot shows the 'Referrals Type' configuration form. The 'Recipient User' dropdown is set to 'Select User...' and is highlighted with a red box. The 'Route Type' dropdown is set to 'Internal'.

| Select | Full Name | User Name | Title | Department |
|-----------------------|---------------|-----------|--------------------|------------|
| <input type="radio"/> | Administrator | admin | Administrator | |
| <input type="radio"/> | Will Westin | will | Sales Manager East | |
| <input type="radio"/> | Sarah Smith | sarah | Sales Manager West | |
| <input type="radio"/> | Sally Bronsen | sally | Senior Account Rep | |

- **Description:** this is a text area that can be used to offer more details about the referral product or service.

- **Campaign:** this field allows users to relate a referral to a campaign. Campaigns can be defined in the Referral Type record view, to be picked up by the Referral record as a hidden field, and then passed to any **Opportunity** created from the referral.
- **Link to Sugar in notification email:** if this checkbox is ticked, the Contact or Account are hyperlinked in the email notification that will be sent to the Sugar user once a Referral is created. Once accessed, the hyperlink will place the user on the record view of the Account or Contact in Sugar.

- **Assigned To:** the user creating the referral will be assigned to the referral, by default.

The screenshot shows the 'Referrals Type' form in a CRM system. The 'Name' field contains 'Required'. The 'Route Type' is set to 'Internal'. The 'Recipient User' is 'Sally Bronsen'. The 'Assigned to' field is highlighted with a red box and contains 'Administrator'. Other fields include 'Description', 'Campaign', and a checkbox for 'Link to Sugar in notification email'.

- **Teams:** clicking on the Show more... hyperlink will open more options for the Referral Type. The **Teams** field is one of those. This field allows the Sugar user the team to which the referral will be related to. By default, the value of the field is **Global**.

This screenshot shows the 'Referrals Type' form with the 'Teams' field highlighted in red. The 'Teams' dropdown menu is open, showing 'Global' as the selected option. The 'Assigned to' field is 'Administrator'. The 'Name' field is 'Required'.

Create External Referral

To create a new External Referral, click on the **Create** button available on the **Referral Type** module. Configure the following fields:

- **Name:** this text field allows users to give their referral type a name.

The screenshot shows the 'Referrals Type' form with the 'Name' field highlighted in red. The 'Name' field contains 'External Referral test'. The 'Route Type' is set to 'Internal'. The 'Assigned to' field is 'Administrator'.

- **Route Type:** this drop-down field allows users to set if the referral is internal or external of the currently used Sugar instance. By default, the value of the field is **Internal**. Change it to **External**.

Accounts Contacts Opportunities Leads Referrals Type

Name: External Referral test [Cancel] [Save]

Route Type: External

- **Recipient User First Name:** this text field lets the user to set the first name of the user to route the referral to. This will be the First Name of the **Recipient To on Automatic External Referrals.**

Accounts Contacts Opportunities Leads Referrals Type

Name: External Referral test [Cancel] [Save]

Route Type: External

Recipient User First Name: Sally

Recipient User Last Name:

- **Recipient User Last Name:** this text field lets the user to set the last name to route the referral to. This will be the Last Name of the **Recipient To on Automatic External Referrals.**

Accounts Contacts Opportunities Leads Referrals Type

Name: External Referral test [Cancel] [Save]

Route Type: External

Recipient User First Name: Sally

Recipient User Last Name: Hansen

- **Recipient User Email:** this text field lets the Sugar user to set the email to route the referral to. This will be the email Address of the **Recipient To on Automatic External Referrals.**

Accounts Contacts Opportunities Leads Referrals Type

Name: External Referral test [Cancel] [Save]

Route Type: External

Recipient User First Name: Sally

Recipient User Last Name: Hansen

Recipient User Email: sallyhansen@gmail.com

External System URL:

- **External System URL:** this text field allows the Sugar user to post a lead via web hook, to a different system.
- **Description:** this is a text field area that can be used to offer more details about the referral product or service.

- **Campaign:** this field allows users to relate a referral to a campaign. Campaigns can be defined in the Referral Type record view, to be picked up by the Referral record as a hidden field, and then passed to any **Opportunity** created from the referral.

- **Link to Sugar in notification email:** if this checkbox is ticked, the **Contact** or **Account** are hyperlinked in the email notification that will be sent to the Sugar user once a Referral is created. Once accessed, the hyperlink will place the user on the record view of the Account or Contact in Sugar.

- **Assigned To:** the user creating the referral will be assigned to the referral, by default.

Accounts Contacts Opportunities Leads Referrals Type

Name: External Referral test

Description: This is a test external referral.

Campaign: Select Campaign...

Link to Sugar in notification email:

Assigned to: Administrator

- **Teams:** clicking on the *Show more...* hyperlink will open more options for the **Referral Type**. Teams is one of those. This field allows the Sugar user the team to which the referral will be related to. By default, the value of the field is **Global**.

Teams

Global

Using the wReferrals Package

- [Creating Referrals with the Create Referral Button](#)
- [Send Internal Referrals with the Manual Routing Method](#)
- [Send Internal Referrals with the Automatic Routing Method](#)
- [Convert Internal Referrals](#)
- [Send External Referrals with the Manual Routing Method](#)
- [Send External Referrals with the Automatic Routing Method](#)
- [Convert External Referrals](#)
- [Referral Notifications in Sugar](#)

Creating Referrals with the "Create Referral" Button

Sugar users can create referrals from an Account or Contact in Record View. In the header of the record, press the **Create Referral** button.

Accounts Contacts Opportunities Leads Calendar Reports

Ac Dirt Mining Ltd ☆

Create Referral Edit

Website: <http://www.salesthe.de>

Industry: Electronics

Member of: Type: Customer

This will open a new Sugar page where the user can select the referred contact

and select the product or service they are referring.

The screenshot shows a CRM interface for creating a referral. At the top, there is a navigation bar with tabs for Accounts, Contacts, Opportunities, Leads, Calendar, Reports, Quotes, and Documents. Below this is a header bar with a 'Re' icon, a 'Cancel' button, and a 'Save' button. The main form contains several fields: 'Referred Account' (Dirt Mining Ltd), 'Referral Awareness' (Cold (Contact is not aware of referral)), 'Referred Contact' (Required), 'Referral Type (Required)' (radio buttons for Sugar 10, Sugar 9, Sugar 8, Sugar 7, External Referral test, Internal Referral test), 'Referral Description (any information useful for the receiving salesperson)' (text area), 'Referred From' (Administrator), and 'Referral Routing Method' (Automatic). The 'Referred Contact' field and the 'Sugar 9' radio button are highlighted with red boxes.

Referral Awareness is a drop-down field where you can set if the contact related to the record is aware or not of the referral: Cold/Warm.

A close-up of the 'Referral Awareness' dropdown menu. The menu is open, showing three options: 'Cold (Contact is not aware of referral)', 'Cold (Contact is not aware of referral)', and 'Warm (Contact is aware of referral)'. The first two options are highlighted in blue.

After saving your referral, it will also appear in the **Referrals** module.

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾ Referrals ▾

Referrals (2) Create

Filter Create Search by name...

| <input type="checkbox"/> | Name | Status | Date Created | Referred To | Referred From | |
|----------------------------|--------------------|--------|-------------------|---------------|---------------|---|
| <input type="checkbox"/> ☆ | Referral: Sugar... | New | 04/14/2020 01:... | Administrator | Administrator | ▾ |
| <input type="checkbox"/> ☆ | Referral: Sugar... | New | 04/14/2020 12:... | Administrator | Administrator | ▾ |

Opening a record in the **Referrals** module will provide the user with a complete description of the referral.

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾ Reports ▾ Quotes ▾ Referrals ▾

Re Referral: Sugar 9 to Dirt Mining Ltd, Mr... ☆ < > Convert To Opportunity Edit ▾

Status
New

Referred Account
[Dirt Mining Ltd](#)

Referred Contact
[Mrs. Mihaela Bulacu](#)

Referral Type
Sugar 9

Referred From
[Administrator](#)

Referred To
[Administrator](#)

Referral Awareness
Cold (Contact is not aware of referral)

Referral Description (any information useful for the receiving salesperson)
This is a referral test.

Referral Routing Method
Automatic

- **Referral Status:** this is a drop-down field that is not visible when first creating the referral. It will automatically appear after the referral is saved. Initially, the status of a newly-created referral is **New**.
- **Referral Account:** when a referral is created from an **Accounts** record, the field is automatically populated with the name of the current account record.
- **Campaign:** this field is hidden on Referral record Create and View mode.
- **Referral Contact:** When a referral is created from the Contacts record, the field is automatically populated with the name of the Contact's parent Account.
- **Referral Awareness:** a dropdown field, where users can choose between

Cold (Contact is not aware of referral) or Warm (Contact is aware of referral) at the referral creation.

- **Referral Type:** this is a radio button. All records created in the Referrals Type module will be displayed here and available for selection.
- **Referral Type Description:** the Referral Type Description is a read-only text field displayed on Referral Record View. The Referral Type record has a description field that will be used to give the referring user details about the referral program. When the user selects a referral type, the display is updated to show the related referral type description text.
- **Referral Description:** The user has a text area field available to describe background for the referral and any notes the recipient may find helpful. Details about why the referral was made can be added.
- **Referred From:** the current user is automatically added
- **Referral Routing Method:** this is a drop-down field where the user needs to specify the routing method:
 - **Automatic:** use the routing specified by the administrator in the Referral Type setup.
 - **Manual:** if the referral is internal, it allows the user to specify another Sugar user. If the referral is external, it provides fields for first name, last name, email address.
- **Referred To:** this is a related field that is visible only if **Referral Type = Internal Referral** and **Routing Method = Manual**.

Send Internal Referrals with the Manual Routing Method

From either the **Accounts** or **Contacts** module, create a new Referral. Ensure that you pick an **Internal Referral Type** and set the **Routing Method** to **Manual**:

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents

Re Cancel Save

Referred Account: Dirt Mining Ltd x

Referral Awareness: Cold (Contact is not aware of referral)

Referred Contact: Makeda Gadbois x

Referral Type (Required): External Referral test This is a test external referral.

- Sugar 10
- Sugar 9
- Sugar 8
- Sugar 7
- Internal Referral test

Referral Description (any information useful for the receiving salesperson)

Referred From: Administrator x

Referral Routing Method: Automatic

Save the referral.

The new referral will be available in the Referrals module.

Accounts Contacts Opportunities Leads Calendar Reports Quotes Referrals

Referrals (3) Create

Filter Create Search by name...

| | Name | Status | Date Created | Referred To | Referred From | Referral Type | |
|----------------------------|---------------------|--------|-------------------|---------------|---------------|--------------------|---|
| <input type="checkbox"/> ☆ | Referral: Intern... | New | 04/14/2020 02:... | Will Westin | Administrator | Internal Referr... | <input type="checkbox"/> <input type="checkbox"/> |
| <input type="checkbox"/> ☆ | Referral: Sugar... | New | 04/14/2020 01:... | Administrator | Administrator | Sugar 10 | <input type="checkbox"/> <input type="checkbox"/> |
| <input type="checkbox"/> ☆ | Referral: Sugar... | New | 04/14/2020 12:... | Administrator | Administrator | Sugar 9 | <input type="checkbox"/> <input type="checkbox"/> |

A relationship between the Referral Contact and Account is also created:

Re Referral: Internal Referral test to Dirt Mining Ltd ☆ < > [Convert To Opportunity](#) [Edit](#) ▾

Status
New

Referred Account
[Dirt Mining Ltd](#)

Referred Contact
[Mihaela Bulacu](#)

Referral Awareness
Cold (Contact is not aware of referral)

Referral Type
Internal Referral test

This is an internal referral test.

Referral Description (any information useful for the receiving salesperson)
Internal referral automatic routing method test.

Ac [Dirt Mining Ltd](#) ☆ [Create Referral](#) [Edit](#) ▾

Co CONTACTS (5 of 6+) + ▾

| | Name | City | State | Email | Office | |
|---|--------------------------------|----------------|-------|--|--------|------------------------|
| ☆ | Mihaela Bulacu | St. Petersburg | NY | mbulacu@w-systems.c... | (603) | View ▾ |
| ☆ | Makeda Gadbois | Santa Monica | NY | vegan.support.phone@... | (385) | View ▾ |

Send Internal Referrals with the Automatic Routing Method

From either the **Accounts** or the **Contacts** module, create a new **Referral**. Ensure that you pick an **Internal Referral Type** and set the **Routing Method** to **Automatic**:

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents Emails

Re Cancel Save

Referred Account: Dirt Mining Ltd

Referral Awareness: Cold (Contact is not aware of referral)

Referred Contact: Required

Referral Type (Required):

- Sugar 10
- Sugar 9
- Sugar 8
- Sugar 7
- External Referral test
- Internal Referral test

 This is an internal referral test.

Referral Description (any information useful for the receiving salesperson):

Referred From: Administrator

Referral Routing Method: Manual

Referred To: Will Westin

In this case, the **Referred To** field is not visible. This field will be auto-populated with the value from the used **Internal Referral Type** after saving the referral.

Accounts Contacts Opportunities Leads Calendar Reports Quotes Referrals

Re Referral: Internal Referral test to Dirt M... ☆ < > Convert To Opportunity Edit

Status: New

Referred Account: Dirt Mining Ltd

Referral Awareness: Cold (Contact is not aware of referral)

Referred Contact: Mihaela Bulacu

Referral Type: Internal Referral test

This is an internal referral test.

Referral Description (any information useful for the receiving salesperson): Internal referral automatic routing method test.

Referred From: Administrator

Referral Routing Method: Automatic

Referred To: Sally Bronsen

Accounts Contacts Opportunities Leads Calendar Reports Quotes Referrals Type

RT Internal Referral test ☆ Edit

| | |
|--|---|
| Route Type Internal | Recipient User Sally Bronsen |
| Description This is an internal referral test. | Campaign |
| Link to Sugar in notification email <input checked="" type="checkbox"/> | Assigned to Administrator |

After saving the referral, a new record is created in the **Referrals** module. Relationships with the related Account and Contact are also created.

Accounts Contacts Opportunities Leads Calendar Reports Quotes Referrals

Re Referral: Internal Referral test to Dirt ... ☆ Convert To Opportunity Edit

| | |
|---|---|
| Status New | Referral Awareness Cold (Contact is not aware of referral) |
| Referred Account Dirt Mining Ltd | |
| Referred Contact Mihaela Bulacu | |
| Referral Type Internal Referral test | Referral Description (any information useful for the receiving salesperson) Internal referral automatic routing method test. |

Convert Internal Referrals

Records in the **Referral module** will have a new button available in **Record View: Convert to Opportunity**.

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾ Reports ▾ Quotes ▾ Referrals ▾

Re Referral: Internal Referral test to Dirt Mining Ltd ... ☆ < > **Convert To Opportunity** Edit ▾

Status
New

Referred Account
[Dirt Mining Ltd](#)

Referred Contact
[Mihaela Bulacu](#)

Referral Type
Internal Referral test

Referred From
[Administrator](#)

Referral Awareness
Cold (Contact is not aware of referral)

Referral Description (any information useful for the receiving salesperson)
Internal referral automatic routing method test.

Referral Routing Method
Automatic

Users can create an opportunity from an Internal Referral, where an opportunity is linked to the referral record. Once the Convert to Opportunity button is pressed, the Convert Referral drawer opens.

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾ Reports ▾ Quotes ▾ Documents ▾ Emails ▾

Convert Referral: Referral: Internal Referral test to Dirt Mining Ltd, Mihaela Bulacu on... Cancel **Save and Convert**

1 **New Opportunity :** Search **Create Opportunity** ^

Op Opportunity Name
Required

Account Name
Dirt Mining Ltd x ▾

Expected Close Date

Likely
\$0.00

Best
\$0.00

Worst
\$0.00

Tags

Status
New

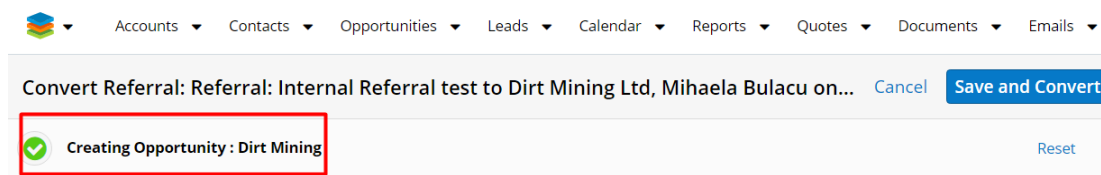
[Show more...](#)

The drawer contains several auto-populate fields:

- The **Campaign** field is automatically filled in with the value from the used Referral Type.
- The **Account Name** field is auto-populated with the Referral Account Name.

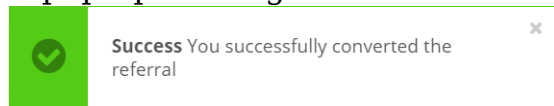
- The **Assigned To** field is set by default to the current user.
- The **Team** field is set by default to Global.
- The **Description** field value is NOT inherited from Referral.

Once the **Create Opportunity** button is pressed, the **Create Opportunity** drawer will close.

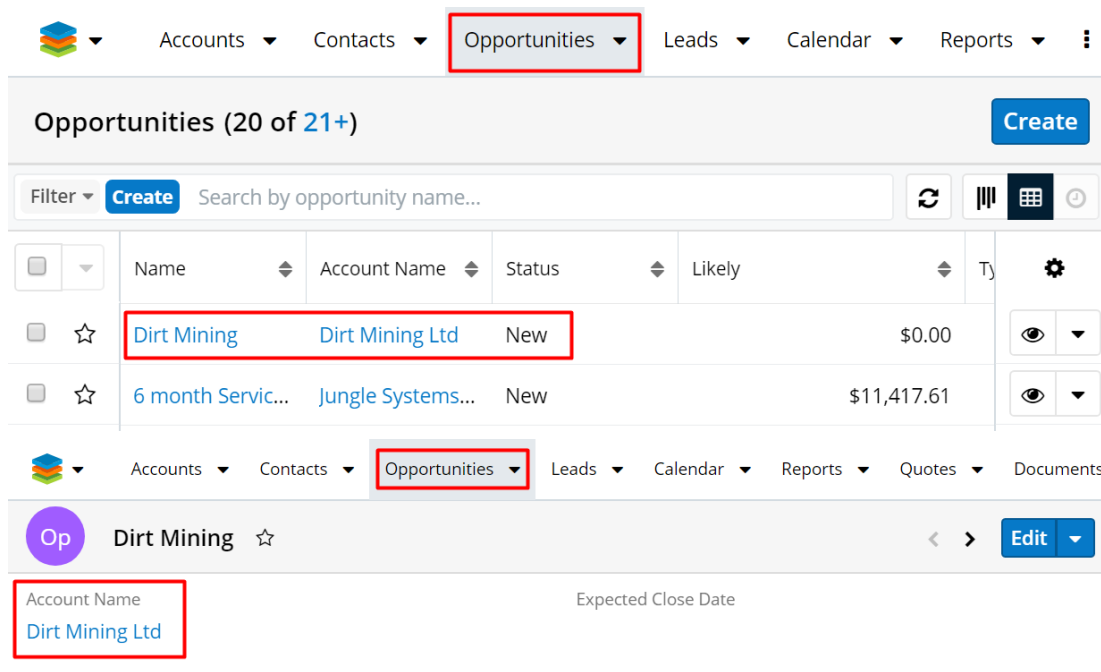


Hit **Save and Convert**.

A pop-up message is raised: **Success you successfully converted the referral:**



Now a new **Opportunity** record is created and related to the **Referral** and parent **Referral Account**.



| Op Dirt Mining ☆ Edit | | | | | |
|---|--------|--------------------|---------------|----------------|--|
| Re REFERRALS (1) + | | | | | |
| Name | Status | Date Created | Referred To | | |
| ☆ Referral: Internal R... | New | 04/14/2020 02:13pm | Sally Bronsen | 👁 | |

Once an Opportunity is converted, the **Convert to Opportunity** button will not be displayed anymore on the **Referral** record in **Record View**. The relationship with the new Opportunity is displayed instead:

| | | | | | |
|---|------------------------------------|--|---|--|----------------|
| | | | | | |
| Re Referral: Internal Ref... ☆ Edit | | | | | |
| Referral Type | This is an internal referral test. | | Referral Description (any information useful for the receiving salesperson) | | |
| Internal Referral test | | | Internal referral automatic routing method test. | | |
| Referred From | Administrator | | Referral Routing Method | | |
| | | | Automatic | | |
| Referred To | Sally Bronsen | | | | |
| Show more... | | | | | |
| Opportunity: Dirt Mining | | | | | 👁 |

Send External Referrals with the Manual Routing Method

From either the **Accounts** or the **Contacts** module, create a new **Referral**. Ensure that you pick an **External Referral Type** and set the **Routing Method** to **Manual**:

Referred Account: Dirt Mining Ltd

Referred Contact: Makeda Gadbois

Referral Type (Required): External Referral test

Referred From: Administrator

Referral Routing Method: Manual

Referral Route to: Email Address: mbulacu@w-systems.com

For the External Referral with Manual Routing Method, the following fields become visible and are needed in order to define the Recipient To user details:

- **Referral Route to:** First Name
- **Referral Route to:** Last Name
- **Referral Route to:** Email Address

After saving the referral, a new Referral record is created in the **Referrals** custom module.

| Name | Status | Date Created | Referred To | Referred From | Referral Type |
|---------------------|--------|-------------------|----------------|---------------|--------------------|
| Referral: Exter... | New | 04/14/2020 03:... | Mihaela Bulacu | Administrator | External Referr... |
| Referral: Intern... | New | 04/14/2020 02:... | Sally Bronsen | Administrator | Internal Referr... |
| Referral: Intern... | New | 04/14/2020 02:... | Will Westin | Administrator | Internal Referr... |

Now log into the external system (the one that has been defined in the used External Referral above) and open the newly-created Referral.

Compared to an Internal Referral, the external Referral contains more details regarding the Account and Contact records:

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾ Reports ▾ Quotes ▾ Referrals ▾

Re Referral: External Referral test to Dirt Mining Ltd, Makeda Gadboi... ☆ < > Convert To Opportunity Edit ▾

Status
New

Referral Awareness
Cold (Contact is not aware of referral)

Referral Type
External Referral test

Referral Description (any information useful for the receiving salesperson)
This is a test external referral.

Referred To
Sally Hansen

Referred From
Administrator

Account
Dirt Mining Ltd

Contact
Makeda Gadbois

Account Address
67321 West Siam St.
St. Petersburg,
NY
30206
USA

Contact Address
321 University Ave.
Santa Monica,
NY
53617
USA

Contact Email Address
vegan.support.phone@example.co.uk

Contact Phone Number
(389) 787-9947

Send External Referrals with the Automatic Routing Method

From either the **Accounts** or the **Contacts** module, create a new **Referral**. Ensure that you pick an **External Referral Type** and set the **Routing Method** to **Automatic**:

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾ Reports ▾ Quotes ▾ Documents

Re Cancel Save

Referred Account
Dirt Mining Ltd x ▾

Referral Awareness
Cold (Contact is not aware of referral) ▾

Referred Contact
Mihaela Bulacu x ▾

Referral Type (Required)
This is an internal referral test.

Sugar 10
 Sugar 9
 Sugar 8
 Sugar 7
 External Referral test
 Internal Referral test

Referral Description (any information useful for the receiving salesperson)
Internal referral automatic routing method test.

Referred From
Administrator x ▾

Referral Routing Method
Automatic ▾

The Referral Route To text fields (First Name, Last Name, Email Address) are not visible for the Automatic External Referral option. The **Referred To** field will be auto-populated with the value used for the **External Referral Type**, after the Referral is saved :

The screenshot displays the Salesforce Referrals interface. At the top, a navigation bar includes 'Accounts', 'Contacts', 'Opportunities', 'Leads', 'Calendar', 'Reports', 'Quotes', and 'Referrals'. The main header shows 'Re Referral: External Referral test to Dirt ...' with a 'Convert To Opportunity' button and an 'Edit' dropdown. The record details include:

- Status: New
- Referral Awareness: Cold (Contact is not aware of referral)
- Referral Type: External Referral test
- Referral Description: This is a test external referral.
- Referred To: Sally Hansen

A second screenshot below shows the 'Referrals Type' dropdown menu open, displaying 'RT External Referral test'. The record details for this type include:

- Route Type: External
- Recipient User First Name: Sally
- Recipient User Last Name: Hansen
- Recipient User Email: mbulacu@w-systems.com
- External System URL: https://wsugarqa.w-systems.com/wsystems_0407_mi...
- Description: This is a test external referral.
- Campaign: (empty)

Log into the external system and open the newly-created Referral.

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾ Reports ▾ Quotes ▾ Referrals ▾

Re Referral: External Referral test to Dirt Mining Ltd, Makeda Gadboi... ☆ < > **Convert To Opportunity** Edit ▾

Status
New

Referral Awareness
Cold (Contact is not aware of referral)

Referral Type
External Referral test

Referral Description (any information useful for the receiving salesperson)
This is a test external referral.

Referred To
[Mihaela Bulacu](#)

Referred From
Administrator

Account
Dirt Mining Ltd

Contact
Makeda Gadbois

Account Address
67321 West Siam St.
St. Petersburg,
NY
30206
USA

Contact Address
321 University Ave.
Santa Monica,
NY
53617
USA

Contact Email Address
vegan.support.phone@example.co.uk

Contact Phone Number
(389) 787-9947

Convert External Referrals

The **Convert to Opportunity** button is also available for the **External Referral** records. Users can create an opportunity from an external referral, where opportunity is linked to the referral record.

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾ Reports ▾ Quotes ▾ Referrals ▾

Re Referral: External Referral test to Dirt M... ☆ < > **Convert To Opportunity** Edit ▾

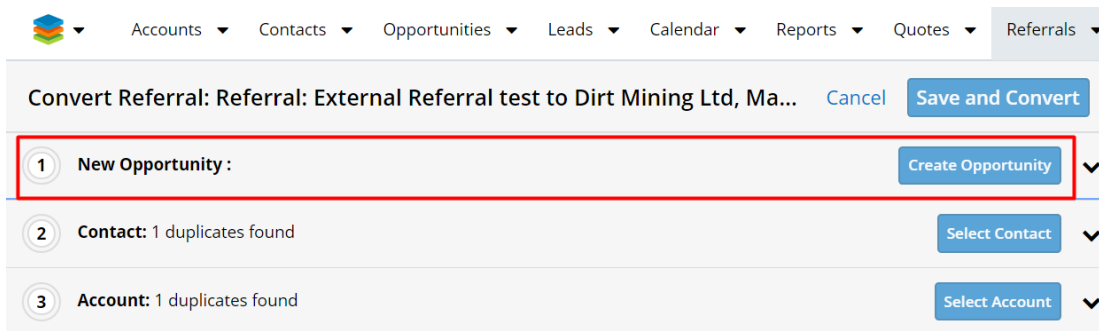
Status
New

Referral Awareness
Cold (Contact is not aware of referral)

Referral Type
External Referral test

Referral Description (any information useful for the receiving salesperson)
This is a test external referral.

Once the **Convert to Opportunity** button is pressed, a new Sugar drawer is opened:

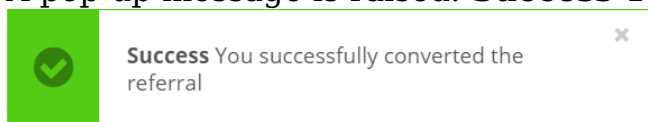


The Opportunity screen is defaulted to open and ready for data entry. This time we will have 3 panels:

- 1. New Opportunity.** Make sure to populate all required fields and hit the **Create Opportunity** button. Once the Opportunity panel is closing, the **Contact** panel is automatically opened.
Note: The Campaign field is not populated on Opportunity because here we don't have the same Referral Type created on this system and we don't know the field value.
- 2. New Contact.** The following Contact details are pre-populated:
 - Contact Address (Street, Postal Code, City, State, Country).
 - Primary email Address.Once the **Contact** panel is closing, the **Account** panel is automatically opened.
- 3. New Account.** The following Account details are pre-populated:
 - Account Address (Street, Postal Code, City, State, Country).
 - Office phone.
 - Primary email Address.**Note:** The secondary email address is not sent to the external system.

Hit **Save & Convert**.

A pop-up message is raised: **Success You successfully converted the referral:**



Now a new **Opportunity** record is created and related to the **Referral** and **Contact** record, but also to the parent **Referral** Account:

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾ Reports ▾ Quotes ▾ Documents

Op **Dirt Mining External Opportunity** ☆ Edit ▾

Re **REFERRALS (1)** + ▾

| Name | Status | Date Created | Referred To | Referred From |
|-------------------------|--------|--------------------|--------------|---------------|
| Referral: External R... | New | 04/14/2020 03:39pm | Sally Hansen | Administrator |

Co **CONTACTS (1)** + ▾

| Name | Account Name | Role | Email | Offi |
|-------------|-----------------|------|-------------------------|------|
| Ana Popescu | Dirt Mining Ltd | | vegan.support.phone@... | (38 |

Referral Notifications in Sugar

1. **Email Notifications:** Email notifications are sent for both Internal and External Referrals Types.

Members ▾ Households ▾ Prospects ▾ Opportunities ▾

Referral: **Referral: Member Referral to White, Kelly Dunn on Jun**

Description
An Operations Manager of the company leading different teams within the

Referral
[Referral: Member Referral to White, Kelly Dunn on June-24-2019](#)

Show more...

Related ▾ All Filter **All Records** Search...

SugarCRM <sugarinstance@sugarcrmdemo.com> 1:04 PM (3 minutes ago) ☆ ↶ ⋮
to me, will ▾

Referral Notification

Hi Jen,

The following is a referral from:
Organization:
Contact: [Jen Smith, will@example.com](mailto:Jen.Smith@example.com)

The referral is for: **Member Referral**
The referral is: **Cold (Contact is not aware of referral)**

Background information, helpful details:
An Operations Manager of the company leading different teams within the Sales department.

Contact information:
Account Name: **White**
Account Website: <http://www.whitecrossco.com>
Account Address Street: **332 Geary Blvd**
Account Address City: **San Francisco**
Account Address State: **California**
Account Address Country: **USA**
Account Address Postal Code: **94102**

Contact Name: **Kelly Dunn**
Contact Email: kelly.dunn@web.com
Contact Phone: **+1 - 884 - 926 - 3010**
Contact Address Street: **259 Bal Air Ave**
Contact Address City: **Orlando**
Contact Address State: **Florida**
Contact Address Postal Code: **32812**

W-Systems SugarExchange Mobile Shortcuts Feedback Help

2. **Sugar Notifications:** Sugar notifications are available only for Internal Referrals and can be identified in both the Sugar header, but also in the **Notifications** module.

Search [20+] [User Profile] [Plus]

- DocuSign Info Sent:Copy of Account Profil... 19 hours ago
- Referral Referral: Sugar 10 to X-Sell Holdi... 2 days ago**
- Referral Referral: Sugar 9 to Dirt Mining L... 2 days ago**
- DocuSign Info Sent:Copy of Account Profil... 2 days ago
- DocuSign Info Voided:Smith & Sons-Copy ... 6 days ago
- DocuSign Info Delivered:Smith & Sons-Co... 6 days ago
- DocuSign Info Sent:Smith & Sons-Copy of ... 6 days ago
- DocuSign Info Completed:Smith & Sons-C... 6 days ago
- DocuSign Info Delivered:Smith & Sons-Co... 6 days ago
- DocuSign Info Sent:Smith & Sons-Copy of ... 6 days ago
- DocuSign Info Sent:Smith & Sons-Copy of ... 6 days ago

Accounts Contacts Opportunities Leads Calendar Reports Quotes Notifications

Notifications (20 of 21+)

| | | | | | |
|--------------------------|-----------------|--------------------------------------|--------------------------------------|--------|--|
| <input type="checkbox"/> | DocuSign Info | Sent:Copy of Account Pro... | Copy of Account Profile T... | Unread | |
| <input type="checkbox"/> | Referral | Referral: Sugar 10 to X-Se... | Referral: Sugar 10 to X-Se... | Read | |
| <input type="checkbox"/> | Referral | Referral: Sugar 9 to Dirt ... | Referral: Sugar 9 to Dirt ... | Unread | |
| <input type="checkbox"/> | DocuSign Info | Completed:Copy of Acco... | Copy of Account Profile T... | Read | |
| <input type="checkbox"/> | DocuSign Info | Sent:Copy of Account Pro... | Copy of Account Profile T... | Unread | |
| <input type="checkbox"/> | DocuSign Info | Voided:Smith & Sons-Co... | Smith & Sons-Copy of Ac... | Read | |

3. Sugar Notifications for Unresolved Referrals: Unresolved referrals have the status **New**. Once the scheduled job is completed, a Sugar notification will be sent to all Sugar users with unresolved referrals.

Send notifications for unresolved referrals ☆

Edit ▾

| | | | |
|----------------------|---|----------------|--|
| Job Name: | Send notifications for unresolved referrals | Status: | Active |
| Date & Time Start: | 01/01/2005 05:00pm | Active From: | Always |
| Date & Time End: | | Active To: | Always |
| Last Successful Run: | 05/22/2018 10:41am | Interval: | Every 7 minutes |
| Execute If Missed: | <input checked="" type="checkbox"/> | Job: | function::sendReferralNotification |
| Date Created: | 05/21/2018 04:53pm by Alexandra Voiculescu | Date Modified: | 08/14/2018 01:04pm by Alexandra Voiculescu |

Job Log

(1 - 1 of 1)

| Job Name | Job Status | Execute Time | Date Modified |
|---|------------|--------------------|--------------------|
| Send notifications for unresolved referrals | done | 05/22/2018 10:41am | 05/22/2018 10:41am |

The unresolved Notification name is: Unresolved Referrals: {user_full_name} {yyyy-mm-dd}. The list with the unresolved Referrals will be displayed in the Notification's Description as hyperlinks.

Last Modified: 2021-05-18 02:59:54