Quick2Email for SugarCRM/SuiteCRM

Emailing Simplified – Version 3.0

Introduction

Quick2Email simplifies the sending of emails from CRM by using the Email Templates in CRM and giving users the option to send emails straight from a list view or from the record view.

Use Cases:

1. Send an email to all primary Contacts where the **Account** they are related to is in the Pharmaceutical industry
2. Send a standard email to a **Contact** together with an attached **PDF Template** (with option to edit PDF before sending)
3. Send a mass email to all Finance related contacts who have an **Opportunity** with Stage "Value Proposition"
4. Send an email to the **Account email address** rather than to Contacts related to the Account

Quick2Email adds the following Menu/Buttons to your CRM system

- Quick2Email button in **Account/Contact/Lead Detail View** – this allows you send an email to the current record you are viewing (and optionally attach a merged PDF file)
- Send Quick2Email menu item to the **Action menu in Account/Contact/Lead/Opportunity** List view – this allows you to send emails to the selected records in the current list view

Note: Quick2Email is not a replacement for an email marketing solution or even the CRMs internal email marketing facility. Quick2Email is designed to address the operational emailing that many users need to carry out daily rather than be an overt marketing system. With this in mind there is no notion of an unsubscribe link in emails that are sent. There is no analysis of open rates or click thrus etc. Quick2Email simply sends emails from the user who is sending the email. Just as if that user were opening their MS outlook and choosing to send an email.

All emails that are sent via Quick2Email are recorded as sent email in the History section of the record receiving the email.

V3.0 Major Release

- Providing support for emailing editable PDF templates.   Now you can send an email to an Account, Contact or Lead and attach a PDF template to the email. More importantly the attached PDF file can be edited prior to attaching and sending. No longer are users forced to download templates, edit them locally and upload to CRM.
- Providing support for Mass Email to Account level email address

Contents

Download and Purchase

Quick2Email is available to purchase and download from
https://www.sugaroutfitters.com/addons/quick2email-for-sugarcrm

https://store.suitecrm.com/addons/quick2email-suitecrm-email-tool

Installation Prerequisites

Before purchasing the module you need to ensure your version of SugarCRM is supported. Quick2Email currently supports SugarCRM v6.4.x. All editions are supported (e.g. CE, PRO, ENT, ULT). Both OnDemand and OnSite are supported.

Quick2Email is upgrade safe however you need to be aware that two files are added to each modules custom folder. If you already have customisations that use the same naming conventions then they will be overwritten so we recommend you check your instance before commencing your installation and if necessary take a backup of any files that may exist. The files are called:

- custom/modules/<module name>/views/**view.list.php**
- custom/modules/<module name>/**controller.php**

Please seek a developer's assistance or contact FibreCRM to help merge code if you find these files exist.

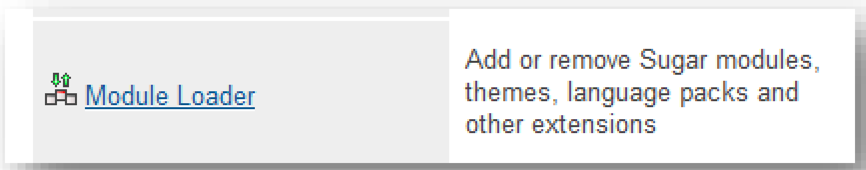
Disclaimer

Whilst this module is upgrade safe, do back up your site before applying this installation. Installation of this module is at your own risk and FibreCRM takes no responsibility for loss of data or disruption in operation.

Installation Process

Having downloaded the module proceed to the Module Loader in SugarCRM.

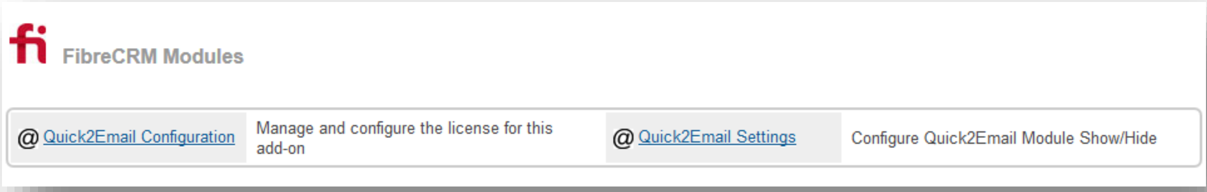
Step 1 – Access SugarCRM Module Loader



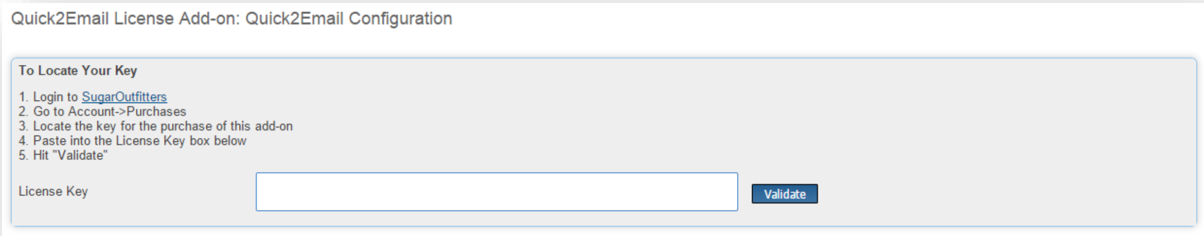
Step 2 – upload module zip file

Step 3 – Install module

Step 4 – Continue to license entry in Admin module



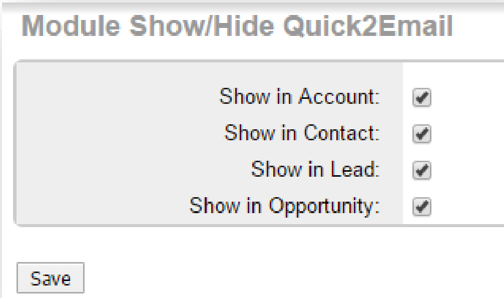
If you've not yet purchased this module or need a free trial you will need to request a license key, add it to the Configuration section and click "Validate".



To request a license key, go to https://www.sugaroutfitters.com/addons/quick2email-for-sugarcrm and click the "TRY IT NOW" button.

The Quick2Email module works across four core Sugar Modules. Click the "Quick2Email Settings" option from the Sugar Admin page to de/activate this plugin within those Modules.

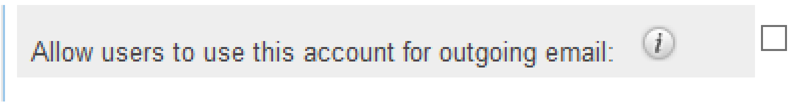
Use the Show/Hide checkboxes to switch on/off this module for each module. Switching off the module simply removes the menu item from the Action menu within the module.



Setting up who the SENDER is of the Outbound Email

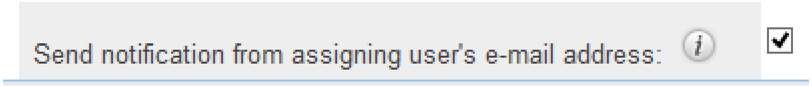
There are two choices with Sugar and it depends which option you've set up in your particular instance. Emails you send can either look as is they are from you or look as is if they are from a 'generic' address such as no_reply@yourco.com

If you want to have these emails appear as if they are from you then make sure the following options are configured in Sugar -> Admin -> Email settings



Uncheck this option.

Secondly you need to tick the following option.



The FROM email address will now be the users default outbound email address and will be sent through their own SMTP settings.

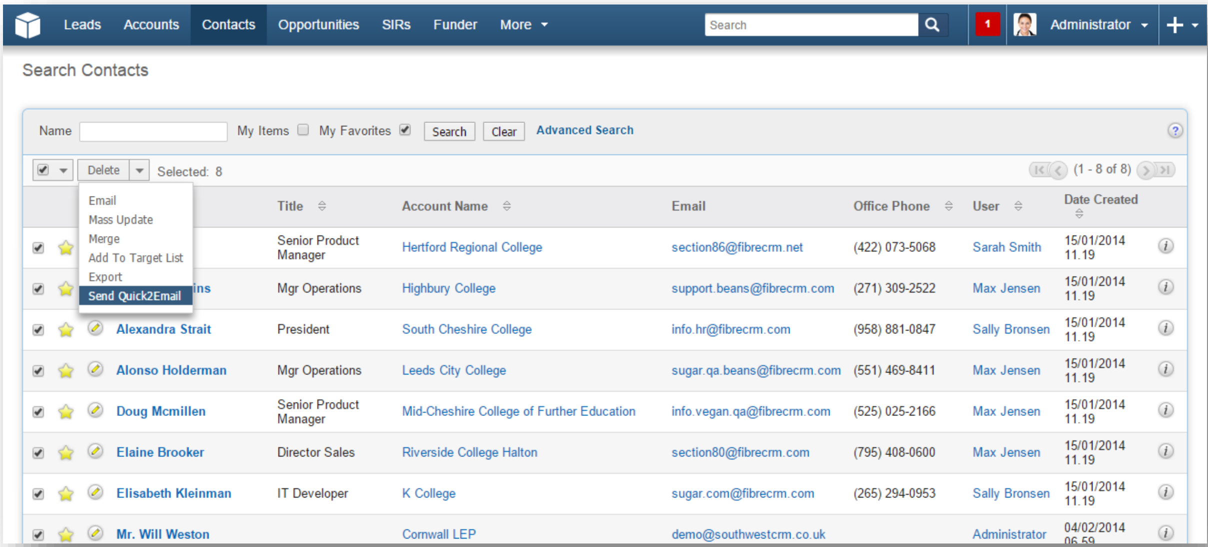
User Guide

Once Quick2Email is installed and configured we recommend you create an email Template, in Sugar, if you've not already done so, prior to use.

To Send Emails to a List of Records

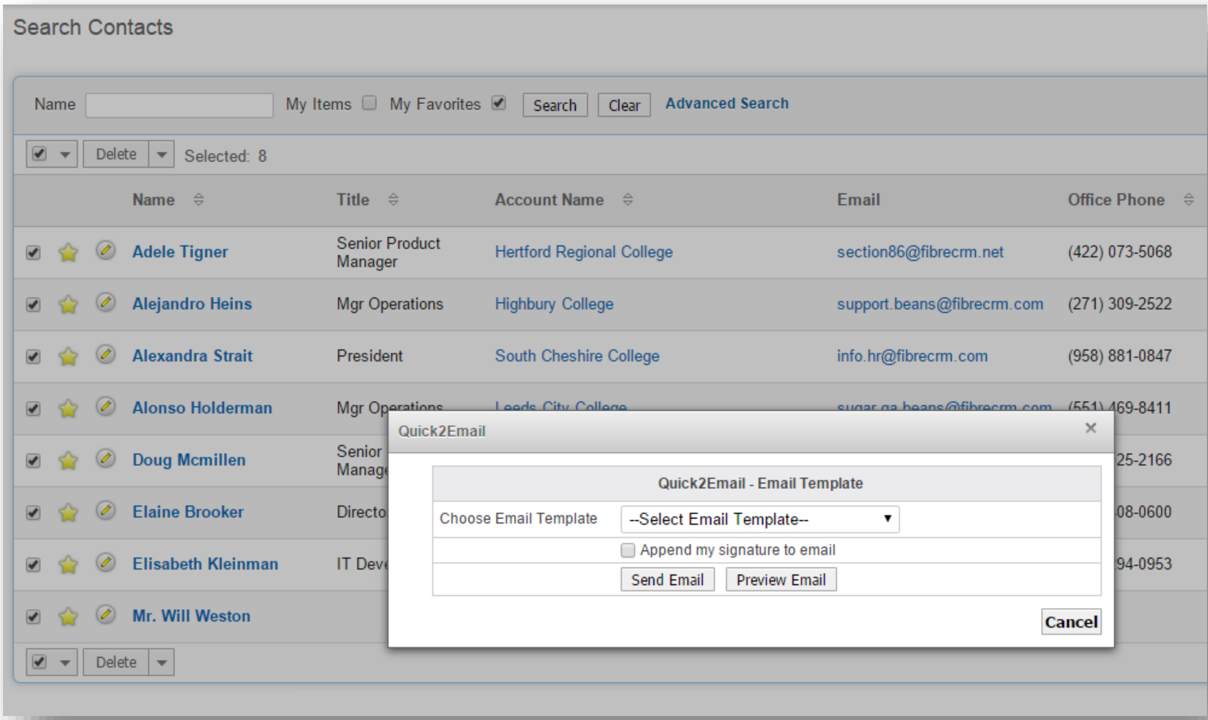
When you are ready, the following steps will help you to send Mass Email.

1. Navigate to a Modules list view (Supports: Leads, Contacts, Accounts and Opportunities).
2. Set your desired filter via the standard Search facility in Sugar.
3. Select the records you wish to send the email to using the checkboxes next to each record.
4. Select "Send Quick2Email" from the Action Menu (see screenshot)

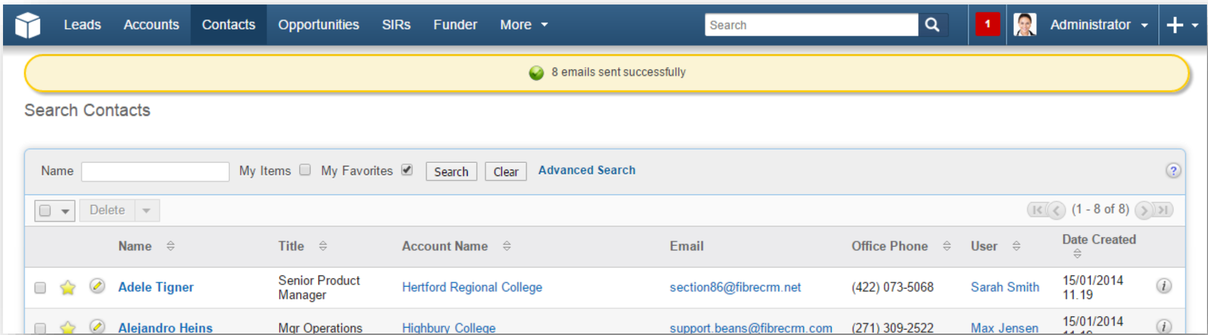


Next…

5. Select an email template from the dropdown choice list
6. If your template does not already include some kind of email signature you can optionally choose to append your own signature to the email. If you have a signature already set up in Sugar, Quick2Email will use that signature and insert it underneath the template
7. The Send Email button will send the email (you will be prompted to confirm first)
8. The Preview Email button will show you how the email will look before you send it

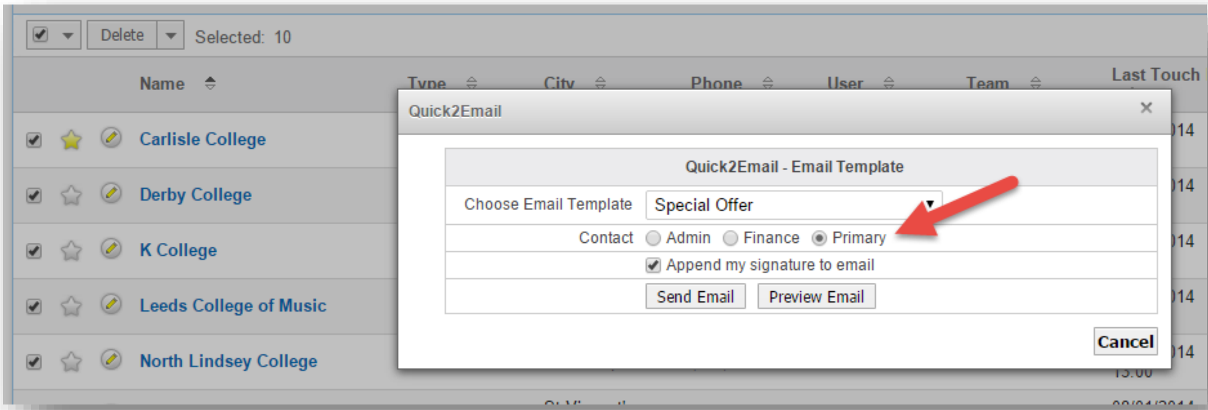


Once the emails have been sent you will see a Success or Fail message at the top of the screeen (see below). It shows the total number of emails that were sent sucessfully.

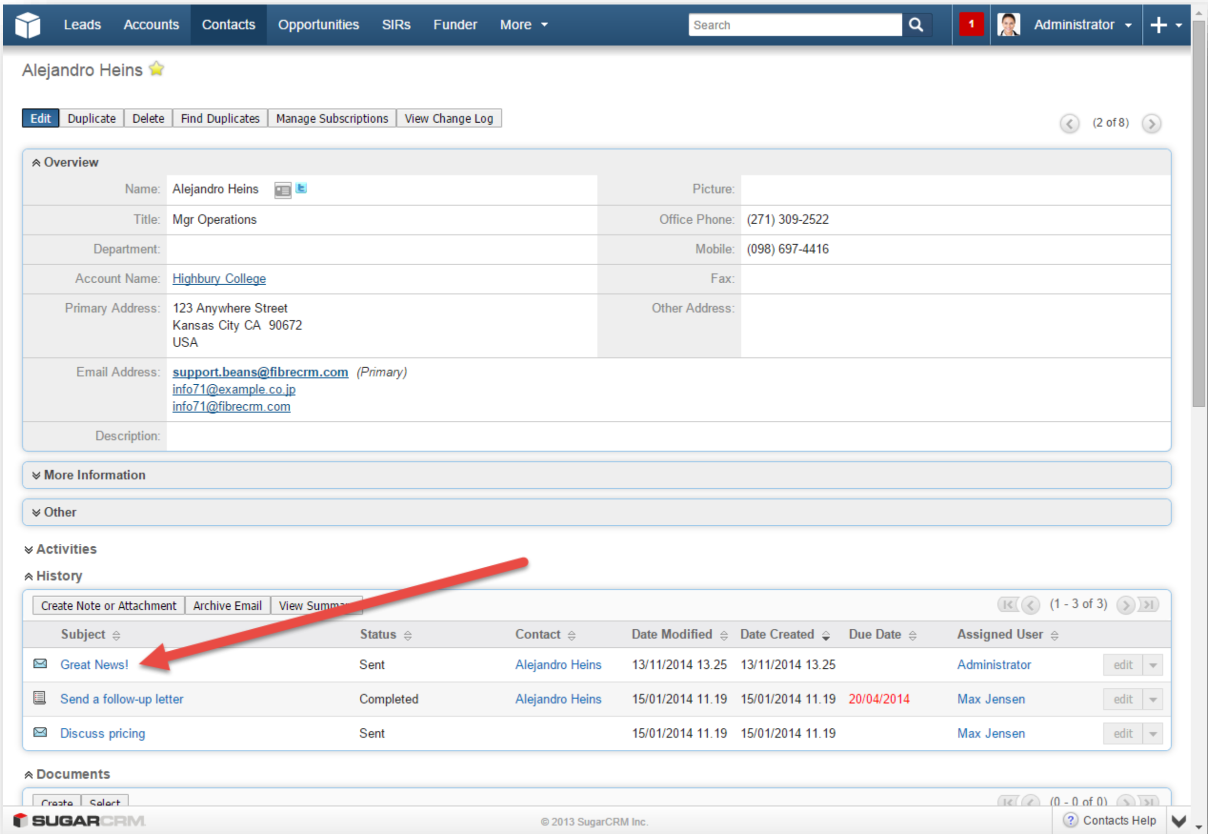


If the number of emails sent successfully is less than the number of records you had selected then you need to check that all records contain email addresses (or if sending from Accounts or Opportunities Modules, that the records have a related Primary, Finance or Admin Contact).

Note: If you are sending emails from the Accounts or Opportunities Modules then the send window includes an additional option to enable to you select who – within these modules – the emails should be sent to. The following screenshot demonstrates this added feature.



All emails that were sent successfully will be shown as sent in the Contact or Lead records History subpanel. See screenshot.



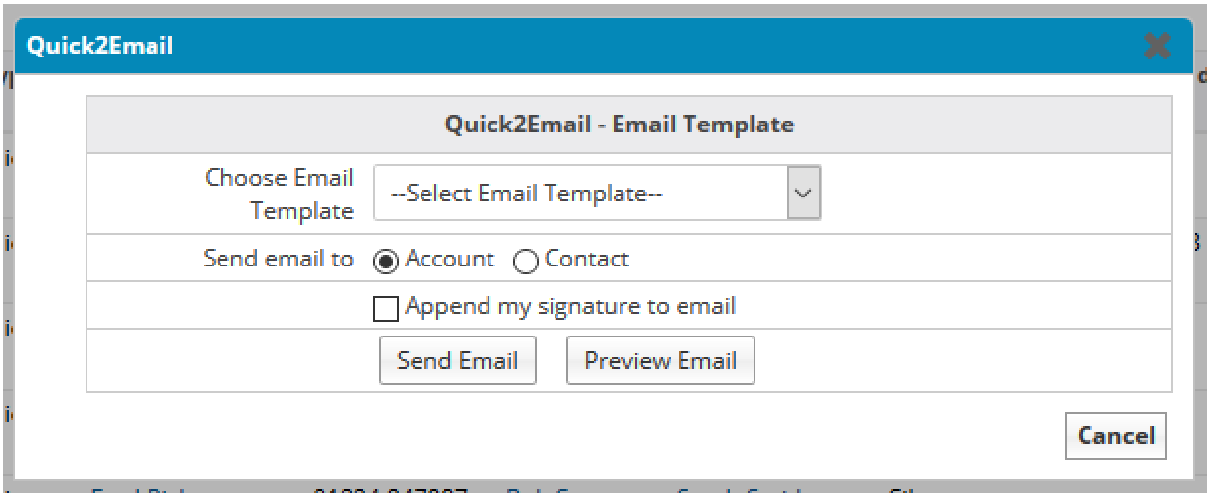
To Send an Email to Accounts

There are times when CRM users need to send email to organisations (Accounts) rather than send to people (Contacts) and what these users will have are email address linked at Account level.

Quick2Email gives CRM users the option to send email to either the Account or to send email to 'key' contacts within each Account.

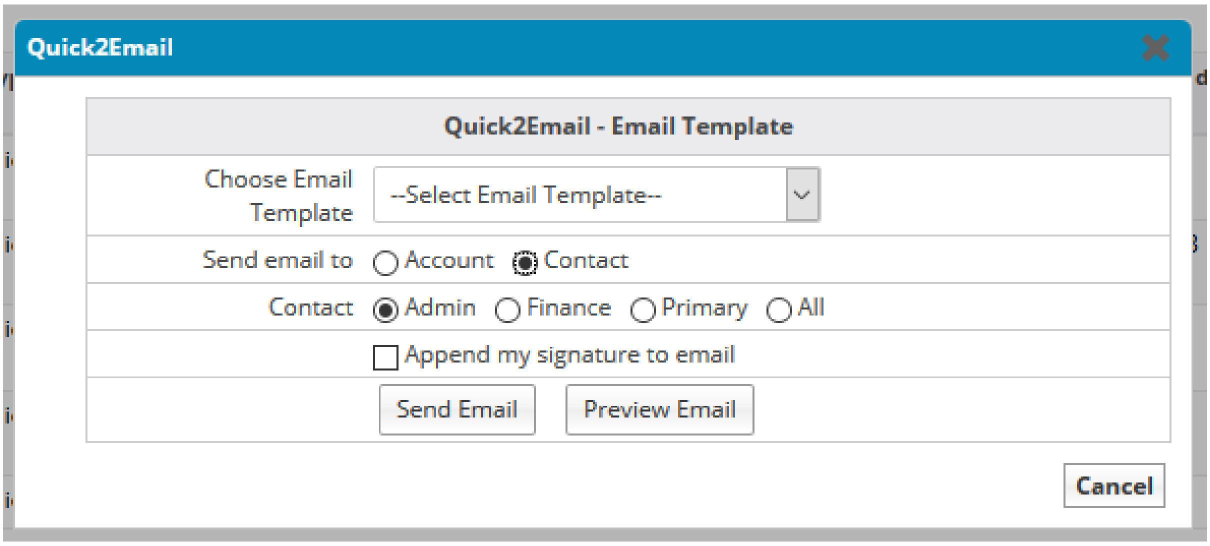
To send Mass Email to Account Email Addresses...

1. Go to the Account list view.
2. Apply any filters you require (e.g. Account last touch date > 30 days) [Tip!]
3. Select the Accounts you want to send email to
4. On the Action Menu select "Send Quick2Email"
5. Pick a Template
6. Click Send Email



To send Mass Email to Contacts Linked to the Selected Accounts....

1. Go to the Account list view.
2. Apply any filters you require (e.g. Account last touch date > 30 days)
3. Select the Accounts you want to send email to
4. On the Action Menu select "Send Quick2Email"
5. Pick a Template
6. Click on the **Contact** option (this unhides more options)
7. Select to send the email to either the **Primary**, **Finance**, **Admin** or **All** three Contacts (see note below)
8. Click Send Email



Note: When Quick2Email is installed three Account-level relate fields are created in the database. These fields can be added to the Account detailview/editview layouts using the Admin > Studio developer tool. Therefore in order for users to use the Contact feature at Account level users must fill in these fields with the corresponding Contacts (e.g. If John Smith is the Primary and Finance contact for ABC Ltd then users will need to edit the Account ABC Ltd and add John Smith to the Primary and Finance contact fields.

To Send Email to Accounts and/or Contacts Linked to Selected Opportunities

Scenario: You want to send personalised emails to people or businesses that have a linked Opportunity. For example, filter a list of Opportunities where the Stage of the Opportunity is "Pending". Now select these Opportunities and choose to send an email to each related Account or Contact.

***Account** – Sends the email to the Primary Email Address of the Account*

***Account Contact** – Sends the email to up to three Contacts who are each related to the Account that is linked to the selected Opportunities. These contacts are the three Contacts designated as Primary, Finance or Admin Contacts using the Quick2Email relate fields at Account level.*

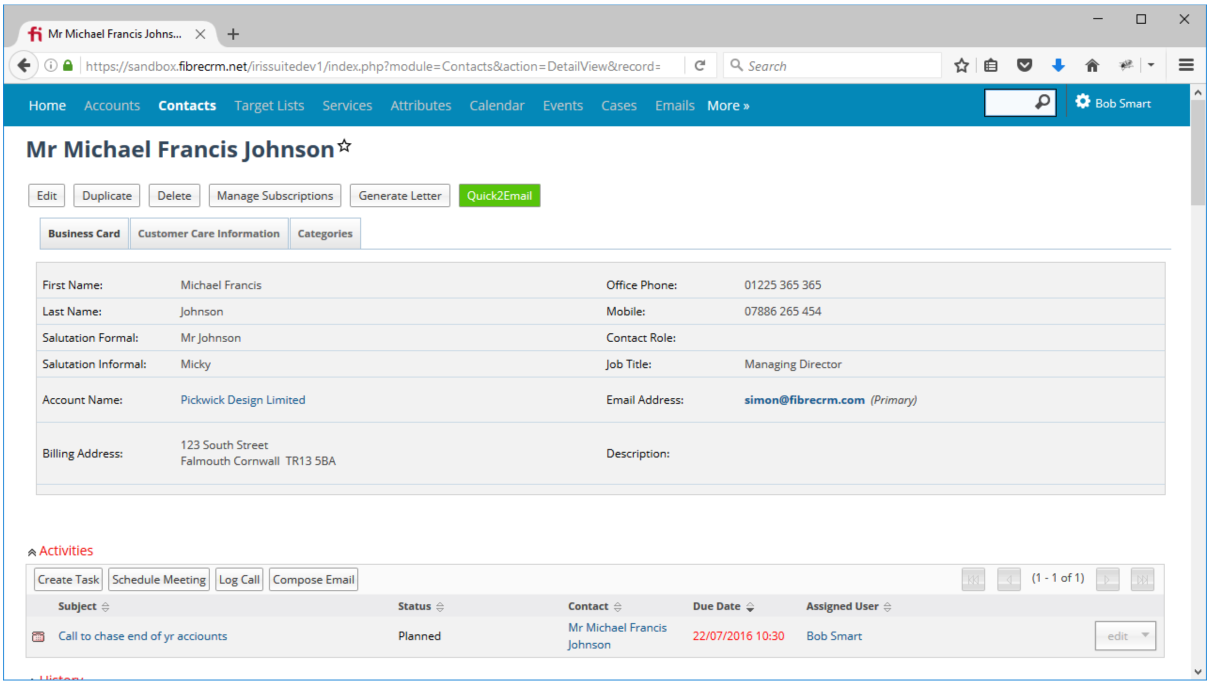
***Contact** – Sends an email to the Primary Email Address of the Contact related to the Opportunity (n.b. custom relationship installed as part of Quick2Email which allows one contact to be linked to an Opportunity). Quick2Email does not send emails to the CRMs default Contacts subpanel within an Opportunity.*

***All** – Sends email to the selected Account Contact(s) and also the Contact linked to directly to the Opportunity.*

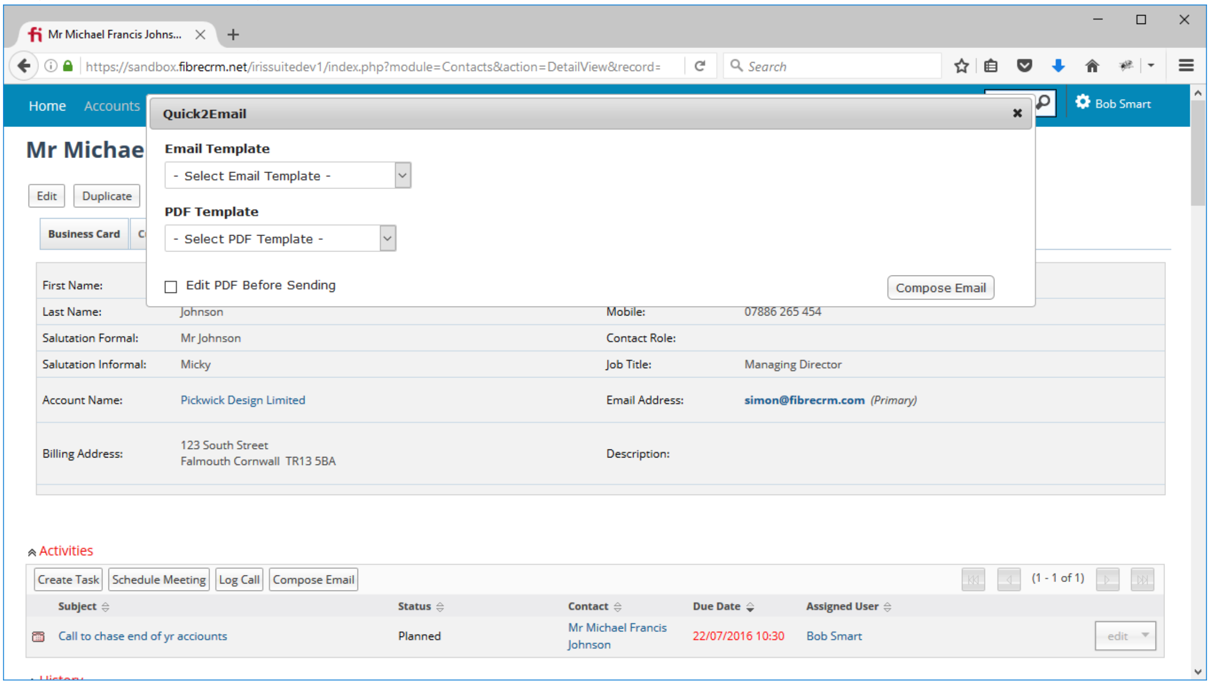
To Send an Email with an attached PDF template

You can send an email with attached PDF from either the Account, Contact or Lead. There is a YouTube demonstration of this capability here: https://youtu.be/WG4-DhVhOQQ

Step 1 – View the Account/Contact/Lead Record and Click "Quick2Email" button

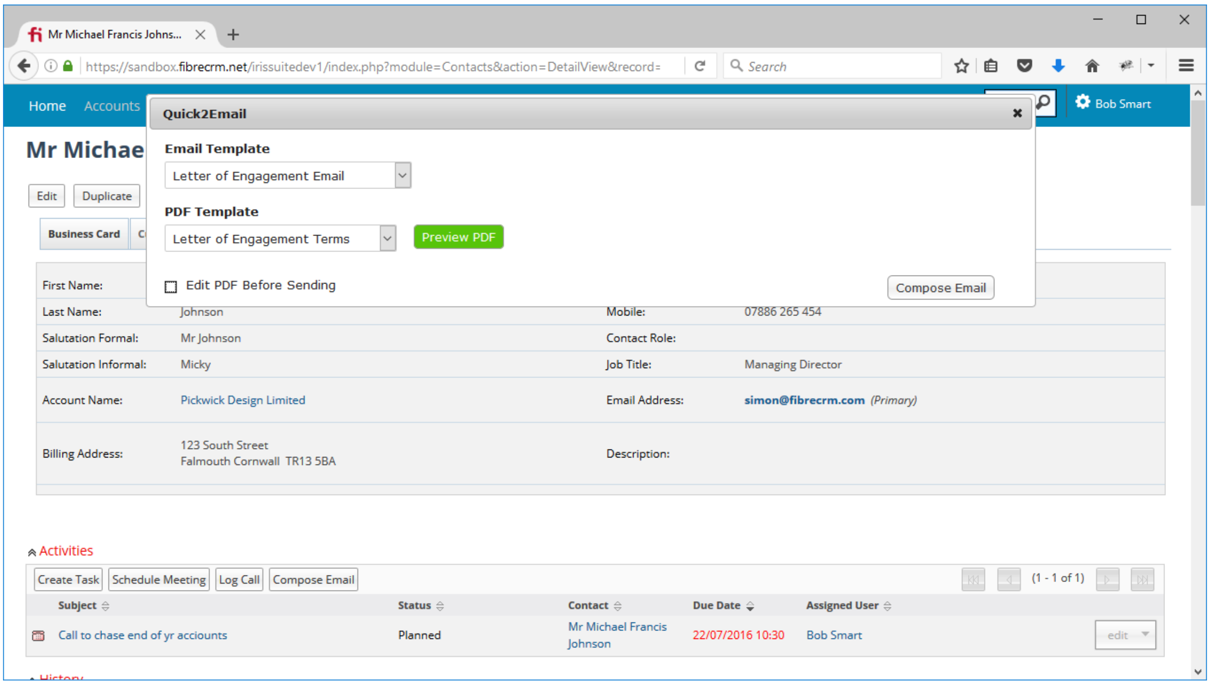


Step 2 – Select the Templates You want to Send

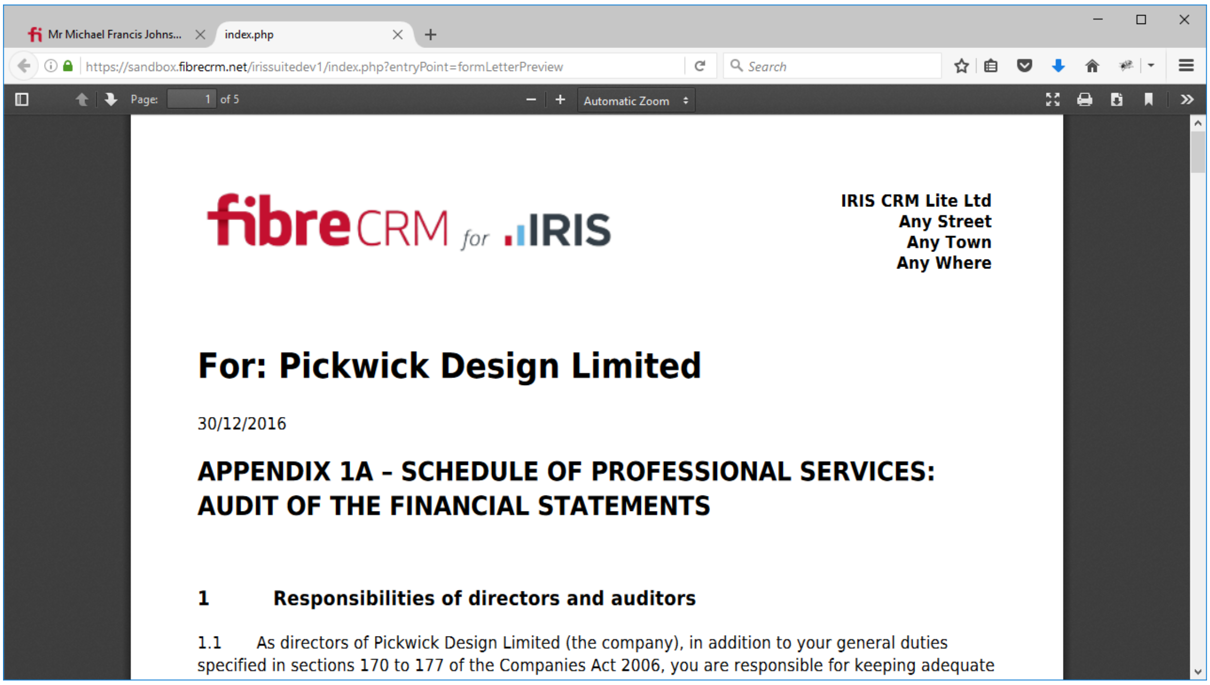


Note: You do not have to select a Template. For example, you might want to select a PDF Template and then opt to write/edit your own email content to accompany the PDF. So, if you don't select an Email template the Compose Email window will load without using an Email Template.

Step 3 – Click Preview to View the Merged PDF

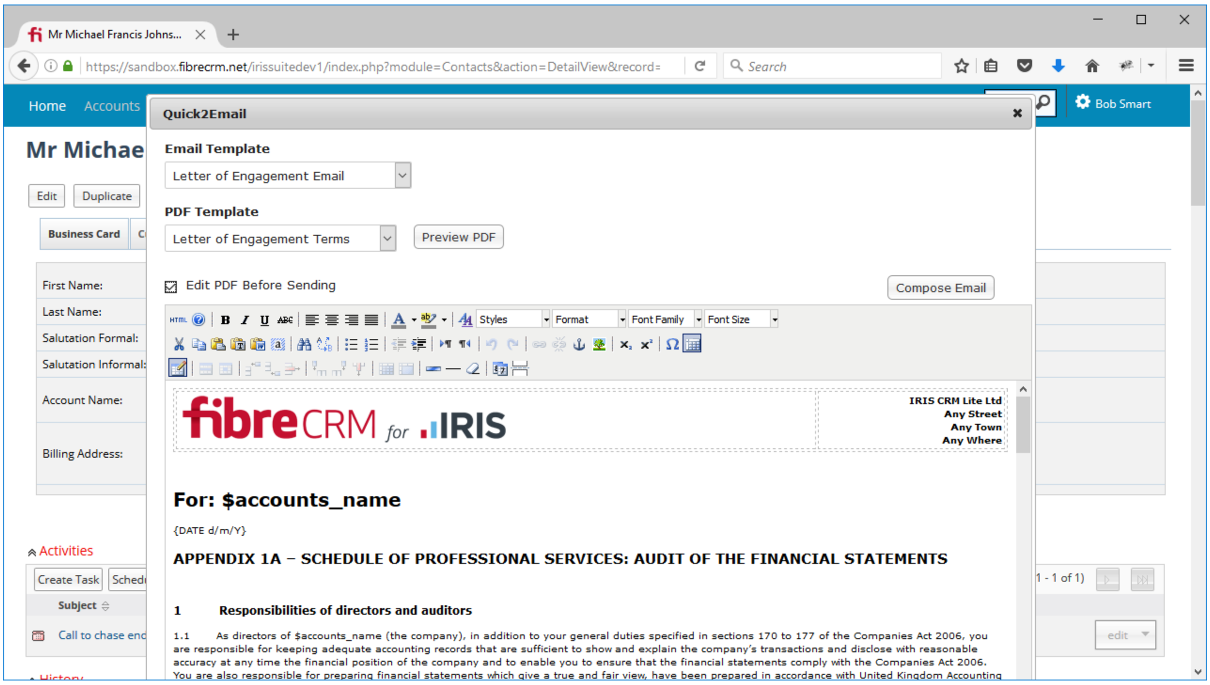


Step 4 – The PDF Preview will open in a separate Window



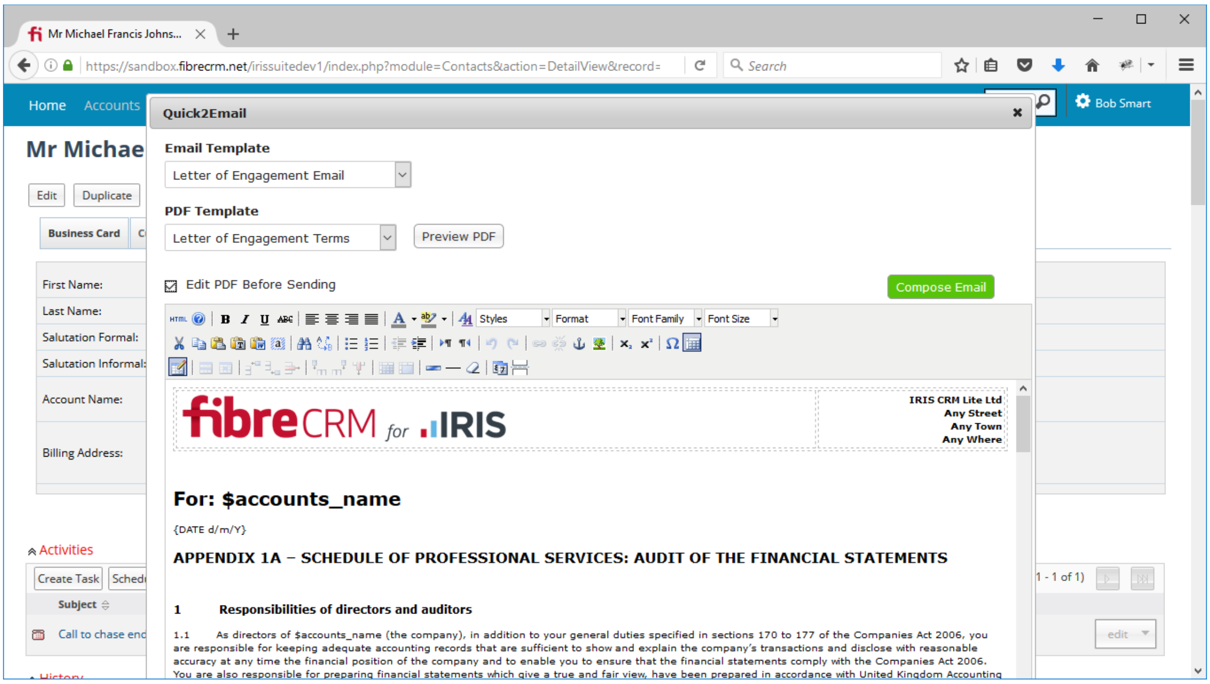
Note: You could save this file is you wish to however it is unnecessary as the file will automatically attach to the email and attach to the Account/Contact/Lead record as a History item. Preview is useful for you to check how the PDF looks once the merge takes place.

Step 5 – Optionally Edit the PDF before Sending



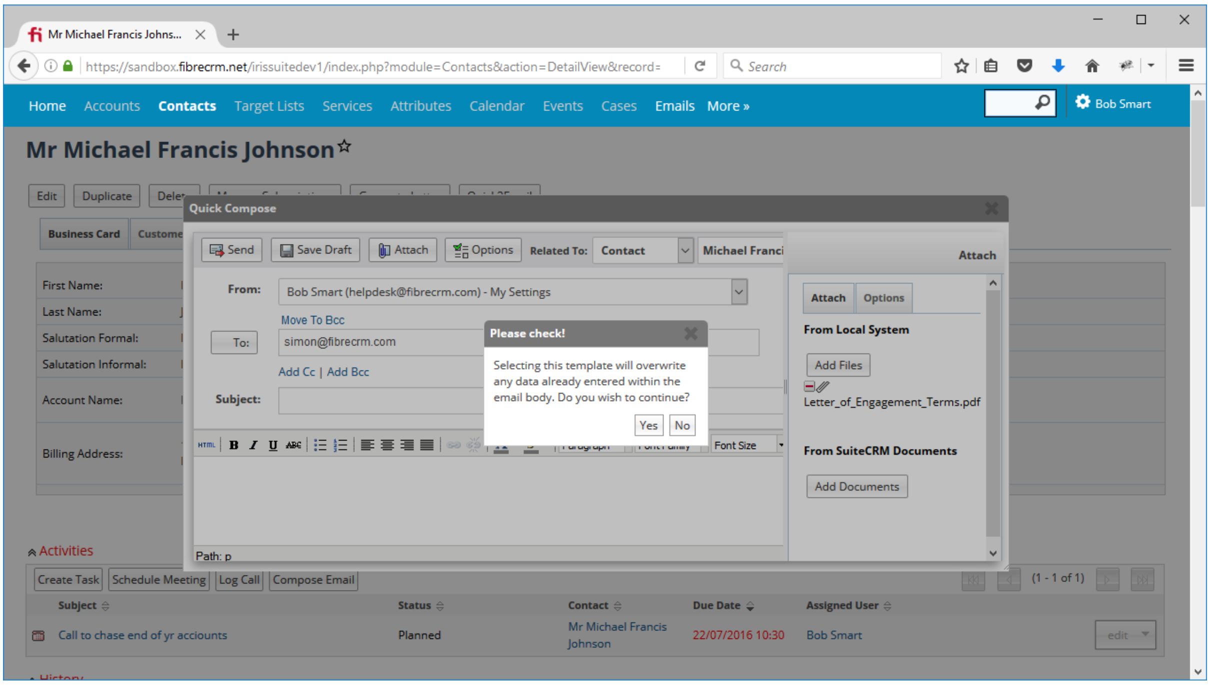
Note: You may wish to edit the PDF template for this particular email. If you do edit it the changes will only be applied to the current PDF that is being emailed. The edits will not overwrite the default PDF template. To change the default PDF template you have to use the CRM's PDF Manager.

Step 6 – Compose Email



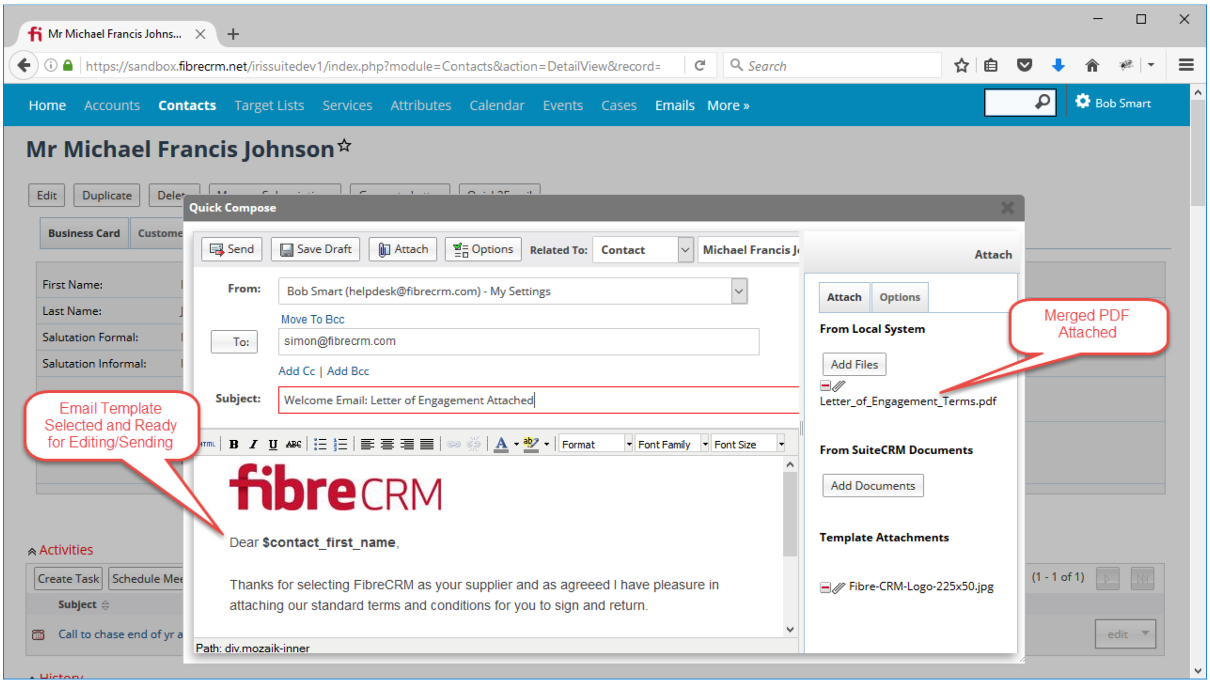
Note: When you hit the Compose Email button the CRMs standard Compose Email window will open with the email template applied and the PDF file attached. You can then choose to SEND the email from the next window.

Step 7 – Confirm you do want to overwrite the existing email body



Note: Whenever you open the CRMs Compose Email window and select an Email Template you will be prompted if you are sure you want to overwrite the existing content. Since the email windows has only just loaded, Just select Yes because there will never be any content there to overwrite.

Step 8 – Ready to Edit/Send



Note: Just click Send button to send the email. Alternatively you can choose to edit the email body or subject line or attach more files. Merge fields within the email body will be merged when you click Send.

FAQ

Before calling our helpline here are some common questions together with potential solutions.

The system reports that 5 emails were sent successfully however I had selected 10 records.

- Do all records have email addresses?

Instead of using an Email Template can I just type some ad-hoc text that is emailed instead?

- No. At this time Quick2Email only sends pre-defined templates. However this is on our development road map.

Does Quick2Email add an Unsubscribe link to email

- Quick2Email works just like sending an individual email from the system. It does not add an unsubscribe link to the outbound emails. If you need this link added, then you should consider using Sugar's in-built Campaigns feature. Quick2Email is designed for sending email to groups of known – already subscribed – contacts (e.g. You may want to alert your Customers of an imminent event and it would not be appropriate for them to opt-out at this point)