

SugarCRM[®]
FOR
DUMMIES[®]

by Karen S. Fredricks



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About the Author

Karen S. Fredricks began her life rather non-technically, growing up in Kenya. She attended high school in Beirut, Lebanon, where she developed her sense of humor while dodging bombs. After traveling all over the world, Karen ended up at the University of Florida and has been an ardent Gator fan ever since. In addition to undergraduate studies in English and accounting, Karen has a Master's degree in psycholinguistics. Beginning her career teaching high school English and theatre, Karen switched to working with the PC during its inception in the early '80s and has worked as a full-time consultant and trainer ever since.

Karen holds certifications in ACT!, QuickBooks, and Microsoft Office. This is the tenth For Dummies book that she has written. Specializing in CRM and contact management software, she has written titles on ACT!, Outlook 2007, Outlook 2007 with Business Contact Manager, and Microsoft Office Live. She is a frequent guest on several syndicated computer radio talk shows and has frequent public speaking engagements.

Karen resides in Boca Raton, Florida. Her company, Tech Benders, specializes in CRM software and provides computer consulting, support, and training services. Karen particularly enjoys helping her clients increase their bottom line through their marketing efforts and improved sales processes. In her spare time, Karen loves to spend time with family and friends, play tennis, work out, ride bikes, and write schlocky poetry.

Feel free to send your comments about the book to www.dummies@techbenders.com.

Dedication

This book is dedicated to new and existing CRM users. I know that you'll be able to use this book to take your business to "the next level." I hope you enjoy reading it as much as enjoyed writing it!

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The people at Wiley Publishing are fantastic to work with and have made writing this book a pleasure! My acquisitions editor, Kyle Looper, is a joy to work with. This is the third book I've done with my project editor, Blair Pottenger; I know when to stick with a good thing! Brian Walls, my copy editor, made sure that all "T's" were crossed and the "I's" dotted; Brian, your edits were always right on!

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Writing a book is not easy, but having someone special in your life certainly makes it a lot more fun! Gary Kahn has loved and supported me during the writing of my last 9 books. You're the best — I couldn't have done it without you. Can't wait to see where the next Bruce concert will be!

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Introduction

You just have to love any product with the word *sugar* in its name. *SugarCRM* is one of the best-selling customer relationship management (CRM) software products on the market today. For many users, SugarCRM represents their first foray into the area of CRM. CRM software is a little more complex to understand than other types of software. With a word processor, each document that you create is totally separate; if you make a mistake, you need only to delete your current document and start fresh. CRM, however, builds its way into a final product; if you don't give a bit of thought as to what goal you wish to achieve, you could end up with a muddled mess.

I'm excited about the product and know that by the time you discover how to unleash the power of SugarCRM, you'll be excited, too. You can use SugarCRM at work. You can use SugarCRM on the road. You can use SugarCRM at home. Most importantly, you can use SugarCRM to grow your business.

So what am I so excited about? I've seen firsthand how SugarCRM can save you time and make you more efficient. To me, accomplishing more in less time is an exciting thought — it allows more time for the fun things in life. Best of all, SugarCRM is a program that's very easy to get up and running in a very short time. You'll be amazed at not only how quickly you can set up a database but also at how easily you can put that database to work.

About This Book

SugarCRM For Dummies is a reference book. As such, each chapter can be read independently in the order you want. Each chapter focuses on a specific topic, so you can dive right in and head straight for the chapter that interests you most. I must say, however, that I've tried to put the chapters into a logical sequence so that those of you who are new to Sugar can just follow the bouncing ball from chapter to chapter. More experienced users can use the Table of Contents and the index to simply navigate from topic to topic as needed.

Essentially, this book is a nuts-and-bolts how-to guide for accomplishing various tasks. Drawing on many of my own experiences as a full-time CRM consultant and trainer, I also include specific situations to give you a feel for the full power of Sugar.

Sugar is Open Source software which means that programmer types can access the most inner parts of the software and make modifications. It also means that many Sugar users are very verbal when it comes to the changes that want to see in the software. Fortunately, the nice folks at Sugar are extremely responsive to the requests they receive so you'll find that your version of Sugar will constantly update itself. This book is based on version 5.0, although most of the functionality covered applies to earlier versions as well.

Conventions Used in This Book

Like in most Windows-based software programs, you often have several different ways to accomplish a task in SugarCRM.

For the most part, I show you how to perform a function by using the SugarCRM menus. If I say to "click the Accounts tab," you must click the word *Accounts* located on the Module bar that runs along the top of every Sugar window. When an instruction reads, "click the Create Contact shortcut," you must click the words *Create Contact* (located at the left side of the SugarCRM screen). In most cases, you can access these commands from anywhere within Sugar, but I generally advise new users to always start a task from the Home page, which is the first window you see when Sugar opens. If you must be in a particular area to complete a task otherwise, I tell you where.

What You Should Read

Of course, I hope that you're going to sit down and read this entire book from cover to cover. Then again, this book isn't *The Great American Novel*. You're probably finding yourself with too much to do and too little time in

which to do it. So, like a kid in the candy store, you'll want to race from one area to another as quickly as possible so that you can reach your final goal as quickly as possible.

For the time being, I'm going to let you get away with reading just the parts that interest you most. You can read the last chapter first and the first chapter last if you like because this book is designed to allow you to read each chapter independently. However, when you find yourself floating in a swimming pool, soaking up the sun, and wondering what to do with all your spare time, you might want to go back and read some of those chapters you skipped. You just might discover something!

What You Don't Have to Read

This book is intended for both new and existing SugarCRM users. Most of the instructions apply to both groups of readers. Occasionally, I include some information that might be of special interest to more advanced readers. Newbies, feel free to skip these sections! Also, any information tagged with a Technical Stuff icon is there for the truly technically inclined. Everyone else can just skip this info.

Foolish Assumptions

One of my least favorite words in the English language is the word *assume*, but I have to admit that I've made a few foolish — albeit necessary — assumptions when writing this book. First, I assume that you own a computer and have Internet browser software. Second, I assume that you have a basic knowledge of how to use your computer, keyboard, and mouse, and that SugarCRM isn't the very first application that you're trying to master.

I also assume that you have a genuine desire to organize your life and grow your business and have determined that SugarCRM is the way to go. Finally (and I feel quite comfortable with this assumption), I assume that you'll grow to love SugarCRM.

How This Book Is Organized

I organized this book into six parts. Each part contains several chapters covering related topics. The following is a brief description of each part, with chapter references directing you where to go for particular information.

Part I: Adding Sugar to Your Life

In Part I, you get an introduction to the concepts of CRM and Open Source software and find out why SugarCRM has become such a popular choice of CRM users (Chapter 1). In this part, you read about how to install Sugar and how to tweak some of your user preferences (Chapter 2). You discover how to navigate your way around Sugar (Chapter 3) and then start sweetening the pot by adding a few Contacts, Accounts, and Leads to Sugar (Chapter 4).

Part II: Cooking with Sugar

Part II focuses on helping you keep your business day organized and productive. You start by scheduling appointments, finding your way around the Sugar calendars, and taking a few notes (Chapter 5). You might find that your activities evolve into major projects (Chapter 6), or that you need help organizing your sales opportunities (Chapter 7). If you have trouble organizing your filing system, you might benefit from the Sugar library (Chapter 8), where you can store your customer-related documents. And, after you've filled your Sugar bowl with lots of information, you'll need ways to get to that data quickly and easily (Chapter 9).

Part III: A Spoonful of Sugar Keeps Your Customers Happy

CRM stands for *customer relationship management*, and that's exactly the focus of Part III. The customer is always right and if he's not happy, you'll want to create a case to resolve his issues (Chapter 10). If you are a manufacturer, Sugar can come to the rescue of your quality control issues by helping you report bugs in your products and perhaps create a Knowledge Base (KB) to help you find the proper solution (Chapter 11).

Part IV: Sharing the Sugar Bowl

One of the best features of SugarCRM is the ability to communicate easily with the outside world. Part IV shows you how to set up your e-mail and work with e-mail templates to automate routine communications (Chapter 12). If you're serious about expanding your business, you'll want to set up a campaign — and track its success — by creating lead forms, sending newsletters or other templates, and then analyzing the success of the campaign (Chapter 13).

Part V: Working with Extra-Strength Sugar

We're all different and often like to do things in our own unique way. SugarCRM understands that concept, and Part V helps you customize Sugar to your heart's content. SugarCRM comes in three flavors, and you'll want to make sure you're using the right one (Chapter 14). At first glance, SugarCRM might seem to include everything you need to organize and grow your business, but by adding fields and modules, and placing them on customized layouts (Chapter 15), you'll be able to transform Sugar into your own unique software application.

Every CRM product needs an Administrator. If you're elected to the job, you need to know how to take control of your users and perform administrative tasks, such as performing routine maintenance, backing up your database, and troubleshoot problems if they arise (Chapter 16).

Part VI: The Part of Tens

With apologies to David Letterman, Part VI gives you a few of my favorite SugarCRM lists. First, I list the features that are found only in the Professional and Enterprise editions of SugarCRM (Chapter 17). SugarCRM is Open Source software, which makes it easy for developers to create products that give Sugar even more power and functionality; I highlight a few of these products in Chapter 18. Finally, I give you ten ways to help you understand everything there is to know about SugarCRM — and then some (Chapter 19)!

Icons Used in This Book



A Tip icon indicates a special timesaving tip or a related thought that might help you use SugarCRM to its full advantage. Try it; you might like it!



A Warning icon alerts you to the danger of proceeding without caution. *Do not* attempt to try something that you're warned not to do!



Remember icons alert you to important pieces of information that you don't want to forget.



A Technical Stuff icon indicates tidbits of advanced knowledge that might be of interest to IT specialists but might just bore the heck out of the average reader. Skip these at will.

Where to Go from Here

For those of you who are Sugar old-timers, you might want to skim the entire contents of this book before hunkering down to read the sections that seem the most relevant to you. My experience is that the average Sugar user probably employs only a portion of the program and might not even be aware of some of the really cool features of SugarCRM. You might be surprised to discover all that SugarCRM has to offer!

For the SugarCRM newbie, I recommend heading straight for Part I, where you can acquaint yourself with Sugar before moving on to other parts of the book and the Sugar program.

Part I

Adding Sugar to Your Life

The 5th Wave

By Rich Tennant



"Look, you've got Product Manager, Sales Manager, and Account Manager, but Sucking Up to the Manager just isn't a field the program comes with."

In this part . . .

I know that you're excited about all the possibilities SugarCRM has to offer and that you want to dive into the program as soon as possible. Here's where you find an overview of some of the cool features that you find in Sugar. You also become familiar with the many faces of Sugar; after all, you wouldn't want to get lost along the way. But first, you have to do a bit of homework and whip Sugar into shape by fiddling with a few preference settings to ensure that Sugar produces the type of results you're looking for. Finally, you add in a dash of Contacts records, sprinkle in a few Accounts records, and top it off with a few Leads records.

Chapter 1

Adding Sugar to Your Life

In This Chapter

- ▶ A history of Sugar
 - ▶ A few basic concepts
 - ▶ Understanding what Sugar does
 - ▶ Determining who should be using Sugar
 - ▶ The different flavors of Sugar
-

So what is SugarCRM, anyway? I find that one of the hardest things that I have to do with SugarCRM is to explain exactly what it is. In this chapter, I give you a bit of background into the company and explain some of the terms that you're likely to hear bantered around. I also give you a few ideas on the types of folks who are using Sugar, and give you a few ground rules that I've established over the years after watching new users wrestle with certain aspects of CRM. I even point out the various flavors of Sugar.

The History of Sugar

It's not imperative that you commit the history of SugarCRM to memory, but I do think it can give you a bit more of an understanding as to why the software is so functional — and why it will work so well for your business.

Once upon a time, there were three young men. I could refer to them as the three Musketeers, but actually, they were John, Jacob, and Clint. They had brains. They were tech-savvy. They had a vision. Unfortunately, they didn't have a lot of money.

Our three heroes soon found that their one edition of Microsoft Office (Student Edition) wasn't sufficient to run a business, so they sought out low-cost alternatives. As their coffers were limited — okay, they were empty — they discovered Open Office, a free alternative to the more expensive Microsoft Office software. Like Scarlet O'Hara, they vowed never to go software hungry again and to purchase the more robust Office when their business expanded.

If this were a big budget Hollywood movie, the seas would part and the music would crescendo; a light bulb went off in their collective heads. “What if,” they wondered, “we built a really great piece of software and *gave it away free* in the hope that businesses would upgrade to something pricier when they could afford it?” Thus, SugarCRM was born.

As in most Hollywood movies, this story has a happy ending. Since its inception in 2004, over 4 million users have downloaded SugarCRM Community Edition (CE) — it’s available in 75 different languages and over 3,000 companies (representing approximately 150,000 users) have actually purchased the software. And yes, our heroes are now using Microsoft Office as are several hundred of their employees.

Getting Started with a Few Basic Concepts

Nobody likes technical jargon, but in the course of showing you how to use SugarCRM I might lapse into Geek Speak and use a handful of somewhat technical terms; I just can’t avoid it. Becoming familiar with them now is less painful in the long run.

What in the world is Open Source?

SugarCRM is *Open Source* software, which means the underlying source code is available to programmer- and developer-types who want to totally transform the software. I like to explain SugarCRM initially by using very politically correct terminology:

- ✔ **Free redistribution:** Open Source software is free; as in, it doesn’t cost you anything.
- ✔ **Includes the source code:** The *source code* is the actual language that the programmer used to create the product. By making the source code available, users can change the software at will — and continue to embellish it.
- ✔ **Derived works:** Once downloaded, you can share the software legally with any of your friends, neighbors, and relatives.
- ✔ **License must not restrict other software:** When you download Open Source software, any tools that you need to run it are included free — there are no hidden charges.
- ✔ **License must be technology-neutral:** Many software programs will only work with specific operating systems; Open Source products, such as Sugar, will work on virtually *any* operating system.

By now, you might be scratching your head and wondering, “Why in the world would anyone want to go to the bother of creating software and giving it away for free?” I’m glad you asked because there’s a bit of method to what you might consider madness:

- ✔ By giving a version of the software away free, you’re able to put your software in the hands of a lot of users who will try it, hopefully like it, and eventually buy a fee-based version if the need arises.
- ✔ Companies like SugarCRM spend very little money on marketing; free distribution leads to a great deal of “word of mouth” advertising.
- ✔ Companies like SugarCRM spend very little money on a sales force because most users that want to upgrade to a fee-based product have already tried the free version for a while and just want to add a little extra functionality.
- ✔ Manufacturers of Open Source receive lots of free feedback on their products, which helps them to both identify any bugs or problems in the software and increase the functionality of the software.

What in the world is CRM?

Just in case you feel like your drowning in a vat of alphabet soup, I’d like to give you a bit more of a feel for *customer relationship management* (CRM). In a nutshell, CRM can help you manage any interaction a company has with its customers — or potential customers. CRM can

- ✔ **Provide you with a unified database to house the contact details for all of your prospects and customers.**
- ✔ **Allow you to associate notes, histories, appointments, and even documents with a specific contact record.**
- ✔ **Give you automated methods to improve your marketing effectiveness.**
- ✔ **Improve your relationship with your current customers by providing you with customer service tools.**
- ✔ **Provide executives with tools to track their sales performance.**

In addition, really good CRM software can:

- ✔ **Be easily customized by adding fields and changing layouts based on your company’s requirements.**
- ✔ **Offer a variety of deployment options so that it can be used by businesses ranging from single owners to mammoth corporations.**

A few other terms to know

SugarCRM is a database program. A *database* is a collection of information organized in such a way that the user of the database can quickly find desired pieces of information. Think of a database as an electronic filing system. Although most Sugar users create a database of contacts, some users develop Sugar databases to collect information about things other than contacts. For example, you might create a Sugar database to track the serial numbers of the products you've sold or the properties that you manage.

Traditional databases are organized by *fields*, *records*, and *instances*:

✔ **Field:** A *field* is a single piece of information. In databases, fields are the smallest units of information. A tax form, for example, contains a number of fields: one for your name, one for your Social Security number, one for your income, and so on. In SugarCRM, you start with numerous fields for Contact, Accounts, and Leads to hold information such as name, address and shoe size.

You find out how to add information into these fields in Chapter 4. And, in Chapter 15, I show you how to change the attributes of existing fields and how to add new fields to your database if you're the database administrator.

✔ **Record:** A *record* is one complete set of fields. In SugarCRM, all the information you collect that pertains to one individual Contact, Account, or Lead is a *record*.

✔ **Instance:** An *instance* is the entire collection of data or information. Each database that you create in SugarCRM is given a unique MySQL instance. You can create more than one instance or database in SugarCRM — head to Chapter 2 to find out how.

Sugar, Sugar!

Fortunately for you, you can't hear me singing my somewhat off-key rendition of *Sugar, Sugar*. I have to admit that I start to hum a few bars every time I think about some of the cool features of SugarCRM. In this section, I've put together a little shopping list of features so that you can see all that SugarCRM can do for you, too. In parentheses after each item, I include a chapter reference where you can find more information about a particular feature (if you're so inclined).

One of the things you might find interesting is that the folks at SugarCRM "eat their own dog food." What I mean by that is everyone from the top-level executives and the folks at tech support to the marketing gurus, administrative staff,

and even the product managers use Sugar. By doing so, they see firsthand whether Sugar provides them with all the tools they need to run a successful business.

SugarCRM is a multifaceted business management tool that

- ✔ **Stores complete contact information, including name, company, phone numbers, mailing addresses, and e-mail addresses.** (Chapter 4)
- ✔ **Comes with enough predefined fields to get you rolling.** If you want to add additional fields and modules to meet your specific needs, go right ahead (Chapter 15).
- ✔ **Records an unlimited number of dated notes, histories, and activities for each of your contacts so that you can easily keep track of important conversations and events.** This feature is particularly useful for those of us who (unlike our friend, the elephant) do forget things on occasion (Chapter 5).
- ✔ **Keeps on top of any issues that your customers are having.** Create a case (Chapter 10), track bugs in your product line (Chapter 11), or produce individualized customer portals that offer customers access to your company's Knowledge Base and FAQ's (Chapter 10).
- ✔ **Allows you to stay in front of your customers and prospects.** Merge your contact information into a template that you create, and then send merged documents via e-mail (Chapter 12), snail mail, or as part of a full-scale marketing campaign (Chapter 13).
- ✔ **Manages your sales pipeline.** Create sales opportunities, track their progress, and analyze the results (Chapter 7).
- ✔ **Shares your data with remote users.** If you have other SugarCRM users in remote locations, they can view database changes online, offline, or even via the browser of their PDA.
- ✔ **Automates your follow-up, assuring that none of your contacts "fall through the cracks."** Sugar's Workflow feature assures that you contact your customers and prospects automatically by relying on a schedule and method that you design (Chapter 14).

Identifying the Typical SugarCRM User

Who is the typical SugarCRM user? Well, with more than 4 million user downloads of the free SugarCRM Community Edition (CE) and over 3,000 businesses currently using a subscription edition of Sugar, you're safe to assume that nearly every industry is represented among its user base.

I think it's only fair to warn you that once you develop a sweet tooth, you'll soon find that Sugar is indispensable. You'll become addicted to SugarCRM and eventually use it to manage all facets of your business. You might just become a Sugar junkie. (Quite simply, a *Sugar junkie* is a SugarCRM user who has become addicted to using SugarCRM.)

So, just who is using SugarCRM? Everyone!

- ✔ **A CEO or sales manager** uses SugarCRM because they want to know what the salespeople are doing and how successful their efforts are.
- ✔ **An administrative assistant** uses SugarCRM to automate routine tasks and to keep a schedule of various tasks and activities.
- ✔ **A salesperson** uses SugarCRM to make sure that she's following up on all her prospects.
- ✔ **Customer Service representatives** use Sugar to make sure that all customers are *happy* customers.
- ✔ **The IT department** uses Sugar to help prioritize — and resolve — any computer-related issues that the staff might encounter.
- ✔ **Tech Support** uses Sugar to track and follow through on customer problems.
- ✔ **The Marketing department** uses SugarCRM to send mailings and marketing campaigns — and to measure their success.

So what kinds of businesses use SugarCRM? All kinds!

- ✔ **Manufacturers** who need to organize any problems that their customers might encounter, and keep track of any known product defects.
- ✔ **Financial planners** who need to track very detailed information on each of their clients.
- ✔ **Businesses in any industry** looking for software that can automate their business and make them more productive in less time.
- ✔ **Large businesses** that want to improve communication among employees, track their leads, and keep their customers happy.
- ✔ **Small businesses** that have to rely on a small staff to complete a multitude of tasks.