

Making Everything Easier!™

SugarCRM

FOR DUMMIES®

Learn to:

- Download, install, and start using SugarCRM
- Offer great service to your customers
- Improve your sales performance
- Transfer information easily between users

Karen S. Fredricks



SugarCRM For Dummies®

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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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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