

# Customizing and Integrating



# SugarCRM

The Essential Guide

## What's in this Guide?

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- **Ease of Use and System Design:** How easy is the system to use for your company's users? What are the best features of this system, how do they work and what can they do for your team?
- **The Data Model:** How are Sugar's objects setup? How will data flow between those objects?
- **Customization:** Mainly we will look at custom fields and custom objects in SugarCRM, as well as layouts. Everyone needs the almighty lead object, but after you've successfully implemented the standard Sugar objects, what else can you create to represent your business?
- **Integration and APIs:** How easy are Sugar's APIs to use? Are there available integrations for the system and will it be easy to incorporate existing product and business data into the system?
- **Automation:** Automation refers specifically to lead assignment and workflow rules. We'll review these capabilities in SugarCRM and focus on ease of use of these features.
- **Pricing and Scalability:** We'll review the pricing and editions that SugarCRM offers, including the flexibility you get and the pros and cons of certain editions.
- **Mobile:** Short review of available mobile applications that exist, developed by the company themselves or by a third party. Focused on iOS and Android apps only.
- **Overall:** Bottom line: how good of a system is this for your business.

# Introduction to Sugar CRM

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**S**ugarCRM has its roots in open source software, where it began back in 2004 as an open source project. Because of its free, open source roots, Sugar has always been available first as a free piece of software, which you can still download (for now) [here](#) and host yourself.

The company now sells “OnDemand” versions of the software at varying levels of cost (covered later), but also makes the “community edition” available for free.

SugarCRM is a traditional CRM for the most part, and like Salesforce.com or Dynamics CRM, Sugar uses a traditional data model, where leads are created in the system, then assigned to reps via workflows, qualified, and converted into contacts - which are then associated with accounts and opportunities.

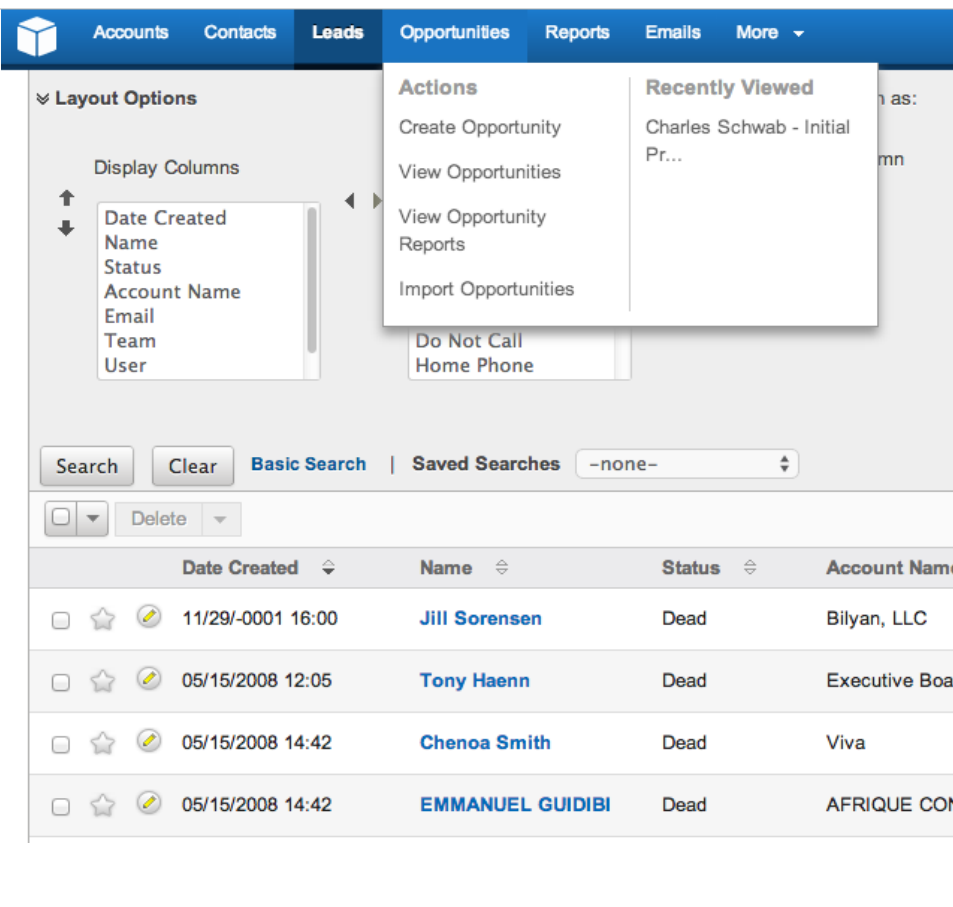
The cloud “OnDemand” version of the product is by far the easiest implementation of the CRM, but hosting the community edition of the software yourself runs on a traditional [LAMP stack](#) and isn't difficult to host and support, should you want to go that route.

## Ease of Use and System Design

SugarCRM is very straight-forward in terms of its system design. Leads are the starting point for any record in the system, and get assigned, converted and worked from there, as you can see from the data model on the next page.

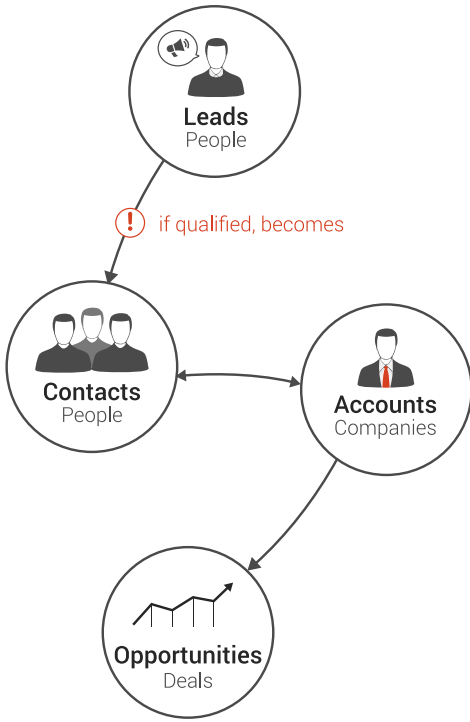
The design of the system has come a long way since the systems inception back in 2004, but the out of the box design of the system still is fairly sterile, even though you can change themes in the design of the system, which updates the colors, but not the layouts.

Our sales reps used SugarCRM for a week or so and found it to be a little difficult to digest the amount of records in their lead views. Other than that though, it's very easy to navigate SugarCRM, and the search functionality in the system is robust and excellent to use. It's also extremely customizable in terms of its views and menus for each user, so make sure that you empower your SugarCRM users to create the views and menus that will make them the most productive.



**Here**, we see a typical Sugar search area where you can search for leads, and then a list of found leads is displayed. A typical navigation is also shown here.

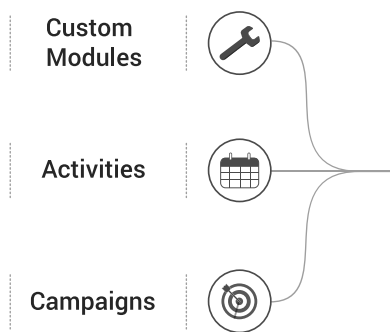
# The SugarCRM Data Model



If we're talking sales, then records start as leads in SugarCRM. **Leads** are people and are sales leads, typically generated by your marketing team.

Once generated, **Leads** are assigned to sales reps, worked and "**qualified**". If qualified, then the lead will be converted into a **Contact** and associated with an **Account**.

Contacts are associated with **Accounts**, which are companies. **Opportunities**, which represent "deals," or pieces of business are also associated with **Accounts**, and therefore have contacts linked to them as well. A "closed/won" deal is used to mark a customer.



Other "child" entities such as **Activities**, **Campaigns** and any **Custom Objects (modules)** that you create can be added to Sugar and tracked over the lifetime of a record in the system.

# Customization

## Custom Fields

Sugar lets your create custom fields on any object, including on custom modules in the system. It's easy to create custom fields, as well as make other customizations. All of these features are located in the "Studio" area of SugarCRM (Admin > Studio). All standard field types that you'd expect are supported.

## Custom Objects

Objects are referred to as "Modules" in SugarCRM. All the standard standbys are there: Leads, Contacts, Accounts and Opportunities, as well as Activities, Campaigns, etc. You can also create custom modules in Sugar, and create custom fields, layouts and relationships for each of these entities as well.

## Layouts

With all of the other customizations, you can also customize layouts in SugarCRM, giving the ability to add fields to areas of the system enable your users to see the data that you want to make available. Layouts are also editable in the Studio.

## Relationships

Relationships allow you to choose which modules relate to each other, and specify 1:1, 1:many or many:many relationships for each. For example, Contacts have a 1:many relationship to Accounts. You can easily create your own relationships between modules in Sugar, which is a great feature.

**Contacts Relationships**

← | Studio > Contacts > Relationships

Add Relationship

Name	Primary Module	Type	Related Module
documents_contacts	Documents	Many to Many	Contacts
opportunities_contacts	Opportunities	Many to Many	Contacts
subac_subaccounts_contacts_1*	Subaccounts	One to Many	Contacts
meetings_contacts	Meetings	Many to Many	Contacts
projects_contacts_resources	Projects	Many to Many	Contacts
projects_contacts	Projects	Many to Many	Contacts
campaign_contacts	Campaigns	One to Many	Contacts
quotes_contacts_shipto	Contacts	Many to Many	Quotes
quotes_contacts_billto	Contacts	Many to Many	Quotes

## Automation

### Workflows

SugarCRM [workflows](#) are very easy and straightforward to manipulate (found here: Admin > Workflow Management) and they are quite similar to other workflow rules that you may have seen in other systems. If you're unaware of workflows, there are 2 parts to grasp in any workflow rule: Triggers, which define when the workflow should fire, and Actions, which define what the workflow will actually do once it runs. [Read about Sugar workflows here.](#) There are a few gotchas with Sugar workflows, such as the "Email Address" field being a separate object in your field list.

Sugar workflows also include "Alerts," which can be used to send emails to employees (Sugar users) when a workflow is triggered, before the actions are executed:



### Lead Assignment

One of the actions of a SugarCRM workflow is to assign records to users. Essentially, the workflow trigger is met on a record (which can be geography, industry, company size or any other way that your company assigns leads) – the action is then to "assign" the record (typically lead or contact) to a user, which would be a sales rep. You can create a lot of these sorts of workflows in Sugar and build out your lead rotator.

### Lead Assignment

Sugar allows for coding on the backend of the system as well – you can write [custom PHP code](#) that will manipulate SugarCRM data, a lot like Salesforce APEX code. You will need coding know-how for this, so make sure you can get help should you need it before diving in.

# Integrations and APIs

The SugarCRM APIs are in a bit of a transition period as of the time of this writing. With the release of SugarCRM version 7, there is a new REST API, which is a big, big step forward from the SOAP APIs that were previously available as a part of Sugar. If you're a new Sugar user and are going to be utilizing the APIs in house, you should use the REST APIs that are available in version 7.

Luckily, there is also software out there that will easily integrate your SugarCRM data with your other business systems, so you don't have to dedicate in-house resources to that end. Sugar has a robust marketplace ([SugarForge](#) and [SugarExchange](#)) of apps and integrations for you to have a look at.

Here are a few of those systems for you to consider:

- [Bedrock Data](#)  
All main objects integrated - From **\$149/month**, self signup and administration.
- **Boomi**  
All main object integrated - From **\$2,000/month**, self-signup, but SaaS admin knowledge recommended.

The screenshot shows the SugarForge website interface. At the top, there is a navigation bar with links for SugarCRM, Sugar Open Source, SugarExchange, SugarForge, Developers, Forums, Blog, Downloads, and Demo. Below this is the SugarForge logo and a secondary navigation bar with links for Open Source CRM, Community, Downloads, Documentation, Support, Developers, Forums, and Projects. A search bar is located below the navigation, with a search button and a link to 'Advanced search'. On the right side of the search bar, there are links for 'Login' and 'Create an account'.

The main content area features a sidebar on the left with a 'Main' section containing links for Open Source CRM, Community, Downloads, Documentation, Support, Forums, and Projects. Below this is a 'Browse by application' section with links for Account Mgmt, Backup and Recovery, and Books.

The central focus is the 'Bedrock Data Platform' project page. It has tabs for 'Overview', 'Resources', and 'Reviews'. The 'Overview' tab is active, showing a description: 'Bedrock Data is a data management and integration platform. Through the Bedrock Data platform, you can easily setup integrations between SugarCRM and other leading SaaS software products.' Below the description is a 'Project Info' table:

Application	Integration
Development Status	5 - Production/Stable
Intended Audience	End Users/Desktop, System Administrators

Below the table, there is a section for 'Activity' with a progress bar showing 0% and a 'Downloads' section showing 0. At the bottom, there is an 'Unrated' button.



## Pricing and Scalability

As previously mentioned, Sugar has 2 versions available to all users: the free “community” edition that you must download and host yourself, and an OnDemand version, which Sugar hosts for you (just like other CRMs) and lets you and your team alleviate the worry around hosting and support issues.

We found the cost of the OnDemand version to be somewhat expensive, but not as much as Salesforce.com and other CRM's in this guide. Here's a breakdown of the pricing options:

<b>SUGAR COMMUNITY</b>  hosted in house  <b>FREE</b>	<b>SUGAR PROFESSIONAL</b>  Basic CRM features reporting, mobile app, sandbox  <b>\$35</b> user/month	<b>SUGAR ENTERPRISE</b>  Phone support Enterprise opportunities Private hosting options  <b>\$60</b> user/month	<b>SUGAR ULTIMATE</b>  24/7 and dedicated support Private hosting included  <b>\$150</b> user/month
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As a comparison, these price points are comparable to Salesforce.com, but the “Ultimate” edition here is about the same price as Salesforce Enterprise.

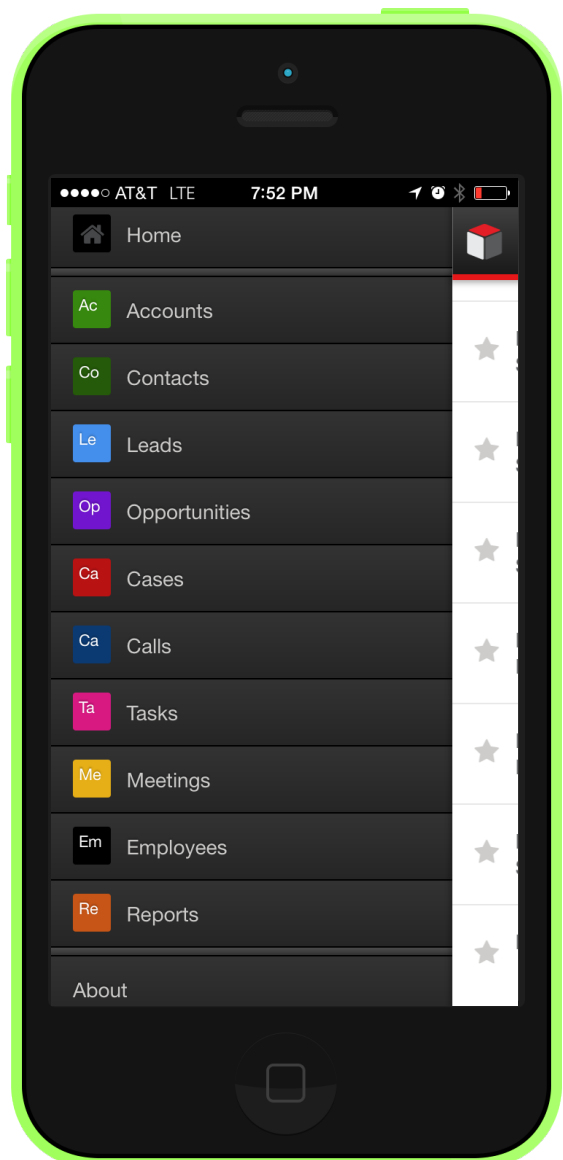
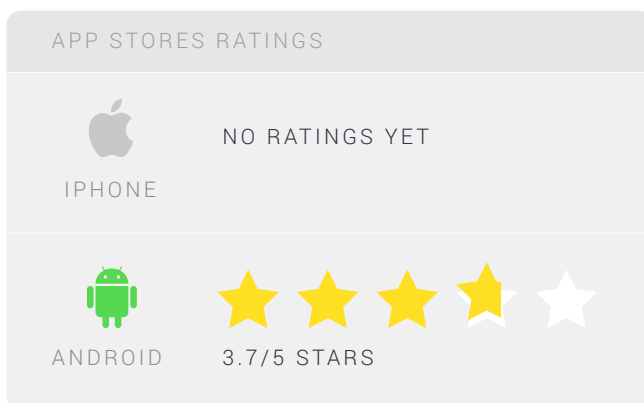
## SugarCRM Mobile App

We love the SugarCRM mobile app for iPhone, and consider it one of the top mobile apps in the CRM space today. You can essentially achieve all of the functionality of the desktop app, but on your phone with easy call integration as well.

Honestly, if we used SugarCRM, I would probably spend a lot of my day in the mobile or tablet app that SugarCRM offers, it's a nicer UI design than the desktop app in our opinion.

You can create new records on top level entities (objects) like leads, contacts, opportunities, (support) cases and accounts. You can also edit essentially any record and make changes across the board.

Both the iPhone and Android apps appear to be fairly new, or recently received major updates, per some of the reviews in the Google Play store, which had comments like "Great app! This is a significant improvement to the old Sugar mobile apps."



## ✓ Overall Takeaways

***For a business system that has its roots in open source software with a somewhat outdated PHP-based core: it's a great product, especially for the price.***

We often get questions like “can we really scale our business with SugarCRM?” and we consistently answer: “Absolutely.” There really isn't much that you can't do with Sugar that you can with any other leading CRM on the market today, including Salesforce.com – that's not a joke.

Features like PHP logic hooks, custom modules (objects) and an excellent new, revamped mobile app make Sugar a major player in the enterprise CRM market.

Cons include the desktop app design and difficulty to administer (the admin area of the system is sort of a mess).

We'd rate SugarCRM highly overall, especially for businesses of 5-100 sales reps.

## In Conclusion

Hopefully we've provided you with helpful information that you can use to make educated decisions about implementing, customizing and integrating SugarCRM. [Should you have any questions](#) about anything that may not have been covered in this guide, feel free to contact us at any time. We will be more than happy to get you started.



### Easily Integrate Your Business Data

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Bedrock connect to a lot of different bussiness systems, including CRMs, ERPs, Marketing Email, Suppot, Finance and E-commerce systems. [Connect with us](#) to learn more, or just [get started with an integration today](#).