



# Getting Started with Sugar



## Themes and Languages



# SUGARCRM®

## Learning Objectives

- About FayeBSG
- SugarCRM Deployment
- SugarCRM Editions
- Administrators & Roles
- Logging into Sugar
- Selecting Languages & Themes
- Support

SugarCRM is a web base application. Which means you can use your Internet Explorer, Google Chrome or Modzilla Fire Fox browsers to access your Sugar instance.



- ❑ 25 Years of Consulting and Customizing Experience
- ❑ Authorized SugarCRM Partners & Developers
- ❑ In-House Programming and Support Staff
- ❑ Specialize in SugarCRM Implementations & Integrations



# SUGARCRM<sup>®</sup>





# SUGARCRM®

## Deployment Options

- Sugar On-Demand:** This is the standard software-as-a-service, cloud offer. Sugar hosts and manages your instance in their cloud.
- Sugar Private Cloud:** Premium On-Demand Solution. Private Cloud is an enterprise-grade cloud offering.
- Public Cloud:** Manage from your choice of cloud services. Choose hosting from Amazon EC2, Rackspace, Microsoft Azure, or IBM SmartCloud Enterprise.
- Partner Cloud:** Sugar Partner can host your instance on their cloud.
- Sugar On-Site:** Host Sugar on your own network and servers and run it behind your firewall.



# SUGARCRM



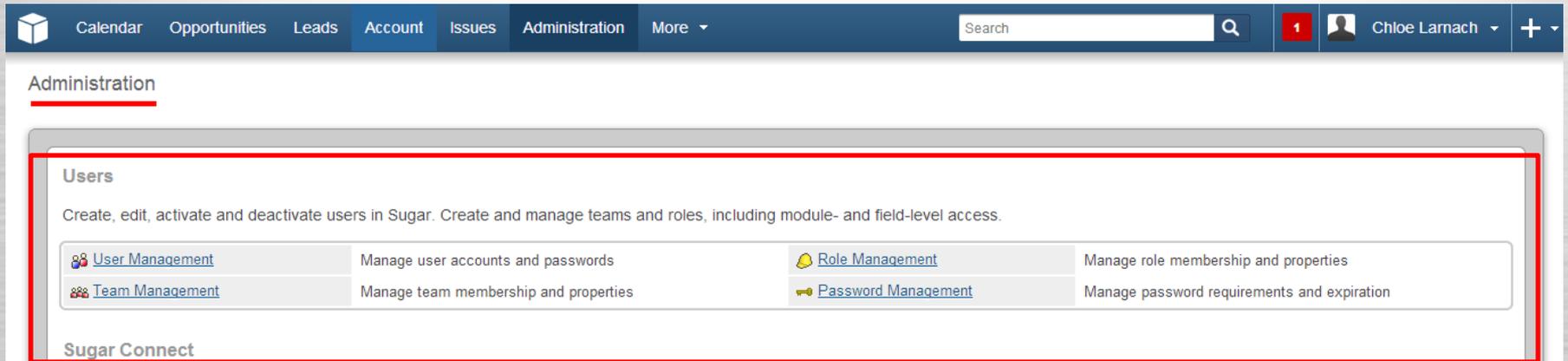
## Editions



**Sugar Ultimate**  
 Additional storage & sandbox  
 Additional support

## Administrators

- ❑ System Administrators have full privileges in all modules, and this cannot be modified.
- ❑ The Administrator can set up new users and apply rules and privileges for these users known in Sugar as **Roles**



The screenshot shows the SugarCRM Administration interface. The top navigation bar includes tabs for Calendar, Opportunities, Leads, Account, Issues, Administration, and More. A search bar and user profile for Chloe Larnach are also visible. The main content area is titled "Administration" and contains a section for "Users". This section is highlighted with a red border and includes the following text and links:

**Users**  
Create, edit, activate and deactivate users in Sugar. Create and manage teams and roles, including module- and field-level access.

<a href="#">User Management</a>	Manage user accounts and passwords	<a href="#">Role Management</a>	Manage role membership and properties
<a href="#">Team Management</a>	Manage team membership and properties	<a href="#">Password Management</a>	Manage password requirements and expiration

**Sugar Connect**

There can be multiple users with System Administrative rights, it is not just limited to one person.

## Roles

- Roles are used to control access to modules.
- A role defines a set of permissions to perform actions such as viewing, editing, and deleting information within a module.
- Only users who are assigned to the role can perform actions defined by it.
- When a user is assigned multiple roles, the more restrictive setting prevails.

## Actions in Roles

You can allow one or more of the following actions in a role:

- Delete:** Grants permission to delete records in the module. If None is selected, the Delete button is disabled on the Detail page.
- Edit:** Grants permission to edit records in the module. If None is selected, the Edit button is disabled on the Detail page. Additionally, the user cannot use the Mass Update panel to update records for the module.
- Export:** Grants permission to export record data in the module. The Export link located at the top of List View is removed when this privilege is not available to the user.
- Import:** Grants permission to import record data in the module. The Import link in the navigation bar does not appear when this privilege is not available.
- List:** Grants permission to access the List Views in the module.
- View:** Grants permission to view records in the module.

You can further specify who can perform each of the above actions, as follows:

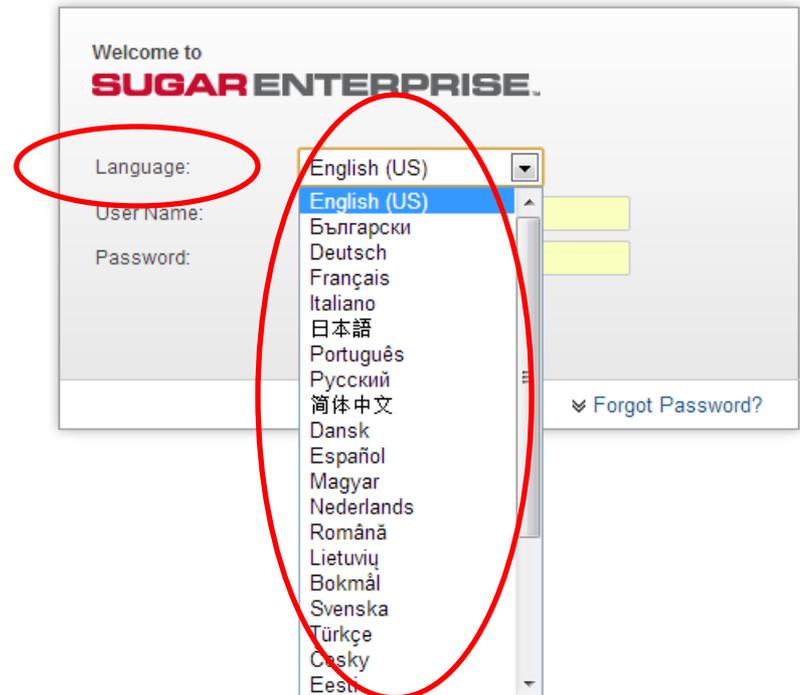
- All:** All users who are assigned to the role.
- Owner:** The person who created the record.
- None:** Nobody can perform the action.
- Not Set:** Ensures that the role does not affect a particular setting. That is, the role allows the action.

## Setting Languages

There are 22 languages to select from. Sugar now includes a right to left theme for those languages written right to left.

Any additional languages needed must be added by your system administrator.

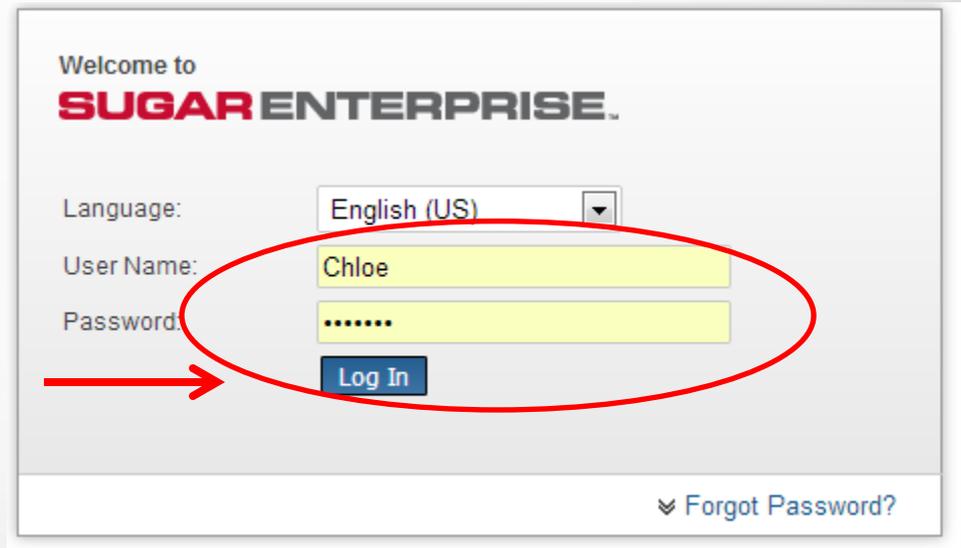
Changing your language preference will only change the system labels, like the module tab names, not the record data that you are inputting or have already entered into Sugar.

A screenshot of the Sugar Enterprise login page. The page title is "Welcome to SUGAR ENTERPRISE." Below the title are three input fields: "Language:", "User Name:", and "Password:". The "Language:" field is circled in red and has a dropdown menu open, showing a list of 22 languages. The languages listed are: English (US), English (US), Български, Deutsch, Français, Italiano, 日本語, Português, Русский, 简体中文, Dansk, Español, Magyar, Nederlands, Română, Lietuvių, Bokmål, Svenska, Türkçe, Casky, and Eesti. The "Forgot Password?" link is visible at the bottom right of the login form.

## Logging into SugarCRM

To Log onto Sugar you are going to need a Sugar URL, a user name and a password. If you do not have this information already you should check with your Sugar Administrator who can provide it for you.

Enter your username and password provided, if you wish you can change the language. You can press the enter key on your keyboard or the log in button to access Sugar.

A screenshot of the SugarCRM login page. The page title is "Welcome to SUGAR ENTERPRISE.". Below the title, there is a "Language:" dropdown menu set to "English (US)". Underneath, there are two input fields: "User Name:" containing "Chloe" and "Password:" containing a masked password ".....". A blue "Log In" button is positioned below the password field. A red oval highlights the "User Name" and "Password" fields, and a red arrow points to the "Log In" button. At the bottom right, there is a link for "Forgot Password?".

We are now looking at the **Sugar Home Page**.

Calendar Opportunities Leads Account Issues Reports More ▾
Search
1
Chloe Larnach
+

My Sugar
Sales
Marketing
Support
Tracker
+

+ Add Sugar Dashlets
 ⌵ Change Layout

#### My Favorite Records

⏪ ⏴ (1 - 5 of 6+) ⏵ ⏩

Name	Module Name ⇅	Date Made Favorite ⇅
<a href="#">SugarCRM Professional</a>	Products	2012-08-28 15:27
<a href="#">Quotes by Stage Report</a>	Reports	2012-07-30 08:26
<a href="#">Product Maintenance Expiration Report</a>	Reports	2012-07-16 08:35
<a href="#">Opportunity by Type Report</a>	Reports	2012-07-16 08:15
<a href="#">New Client Report</a>	Reports	2012-07-02 08:30

#### My Activity Stream

▼ Chloe Larnach  Post

⏪ ⏴ (1 - 15 of 16+) ⏵ ⏩

**Jake Buttikofer** created a **new opportunity** ⓘ  
 Data Migration with for \$3,500.00  
7 Hours ago Reply - Delete

**Jake Buttikofer** created a **new lead** ⓘ  
8 Hours ago Reply - Delete

created a **new contact** ⓘ  
10 Hours ago Reply - Delete

**Chloe Larnach** created a **new lead** ⓘ  
13 Hours ago Reply - Delete

**David Faye** created a **new lead** ⓘ Dave  
13 Hours ago Reply - Delete

#### My Open Cases

⏪ ⏴ (0 - 0 of 0) ⏵ ⏩

Number ⇅	Client Code ⇅	Subject ⇅	Start Date ⇅	User ⇅	Status ⇅
No Data					

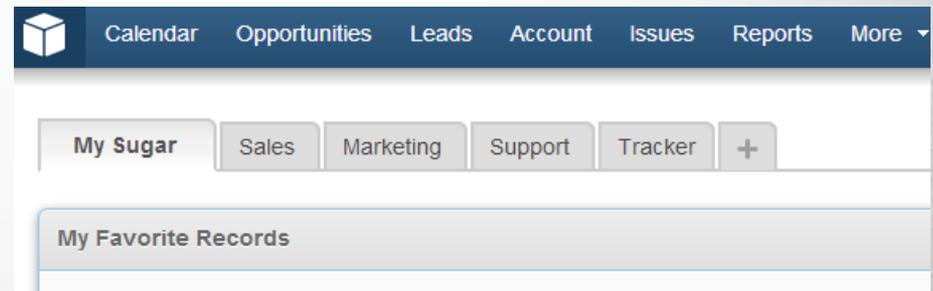


Let's go over themes.

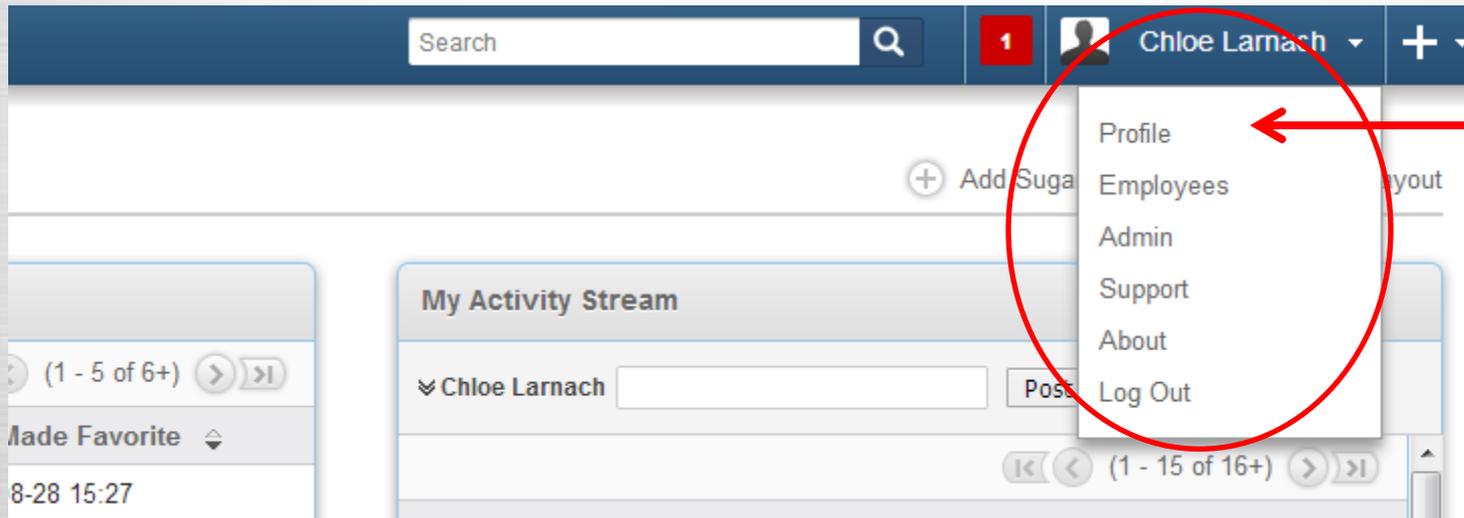
You can change the look and feel of your Sugar whenever you want to. It is not determined by your system administrator. You can do this by selecting the themes you want to use.

Note that some themes will change the location of the **Module Tabs and Action Menus**, but regardless of the themes you select the same information will be displayed **Module Tabs and Action**.

The default theme is **Pacific**.

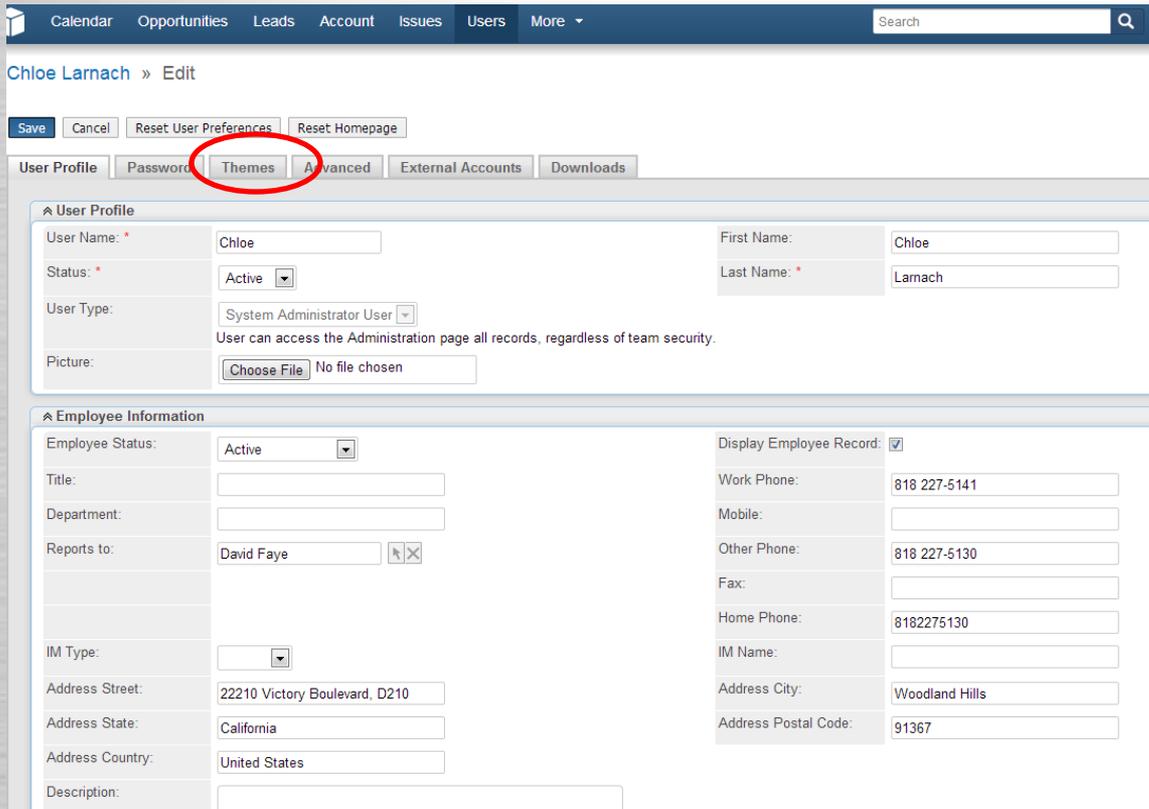


To change the theme – navigate to the users profile located on the systems link menu.



Click on the users name in the top right hand corner to access the menu. Then select profile from the system links

In the profile you can see that you have access to a theme tab which you can select. This tab allows you to select the theme of your view of Sugar.



Calendar Opportunities Leads Account Issues Users More ▾ Search

Chloe Larnach » Edit

Save Cancel Reset User Preferences Reset Homepage

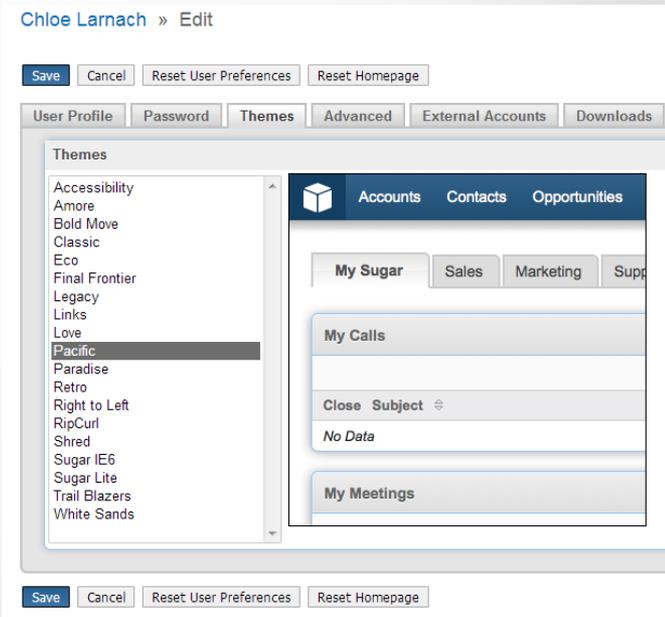
User Profile Password Themes Advanced External Accounts Downloads

**User Profile**

User Name: \* Chloe First Name: Chloe  
Status: \* Active Last Name: \* Larnach  
User Type: System Administrator User  
User can access the Administration page all records, regardless of team security.  
Picture: Choose File No file chosen

**Employee Information**

Employee Status: Active Display Employee Record:   
Title: Work Phone: 818 227-5141  
Department: Mobile:  
Reports to: David Faye Other Phone: 818 227-5130  
Fax:  
IM Type: Home Phone: 8182275130  
IM Name:  
Address Street: 22210 Victory Boulevard, D210 Address City: Woodland Hills  
Address State: California Address Postal Code: 91367  
Address Country: United States  
Description:



Chloe Larnach » Edit

Save Cancel Reset User Preferences Reset Homepage

User Profile Password Themes Advanced External Accounts Downloads

**Themes**

- Accessibility
- Amore
- Bold Move
- Classic
- Eco
- Final Frontier
- Legacy
- Links
- Love
- Pacific**
- Paradise
- Retro
- Right to Left
- RipCurl
- Shred
- Sugar IE6
- Sugar Lite
- Trail Blazers
- White Sands

Accounts Contacts Opportunities

My Sugar Sales Marketing Supp

My Calls

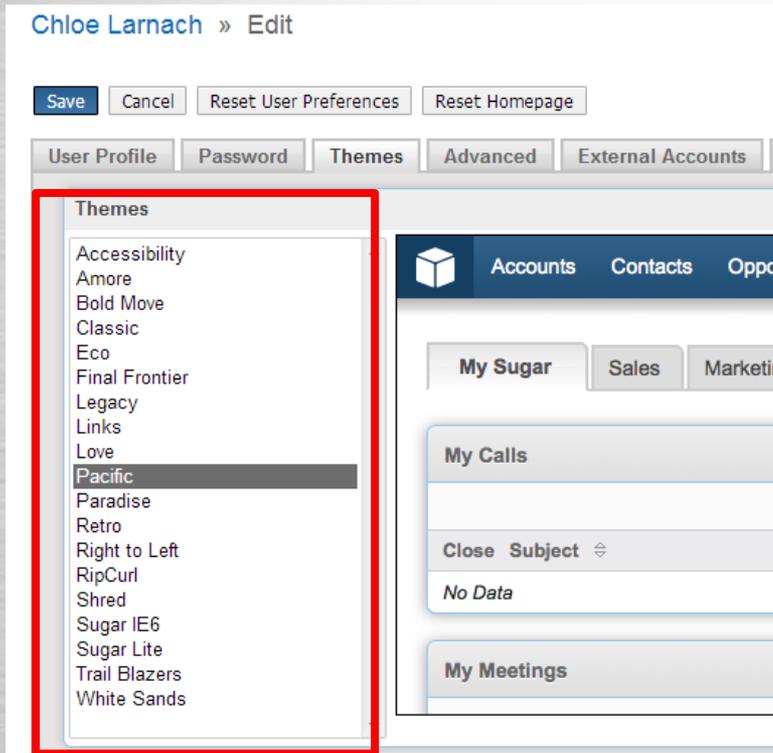
Close Subject ⇅

No Data

My Meetings

Save Cancel Reset User Preferences Reset Homepage

You can get a quick preview of each theme by selecting a theme on the left side of the screen, and view the preview on the right side.



Chloe Larnach » Edit

Save Cancel Reset User Preferences Reset Homepage

User Profile Password Themes Advanced External Accounts

Themes

- Accessibility
- Amore
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Accounts Contacts Oppo

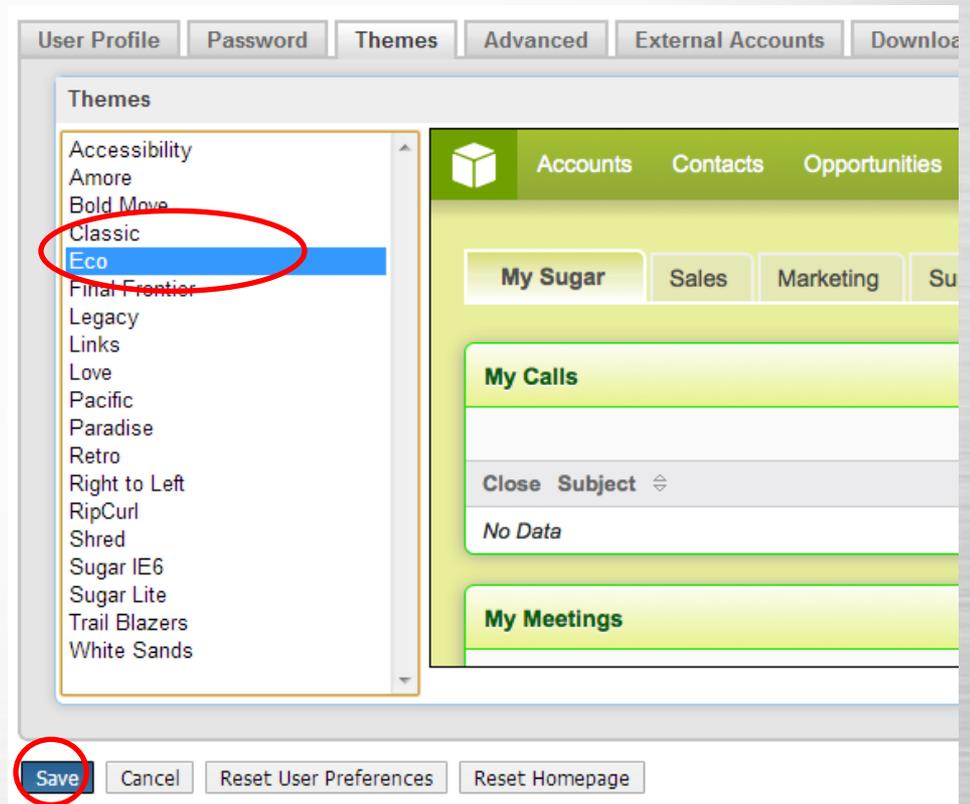
My Sugar Sales Marketin

My Calls

Close Subject

No Data

My Meetings



User Profile Password Themes Advanced External Accounts Download

Themes

- Accessibility
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Accounts Contacts Opportunities

My Sugar Sales Marketing Su

My Calls

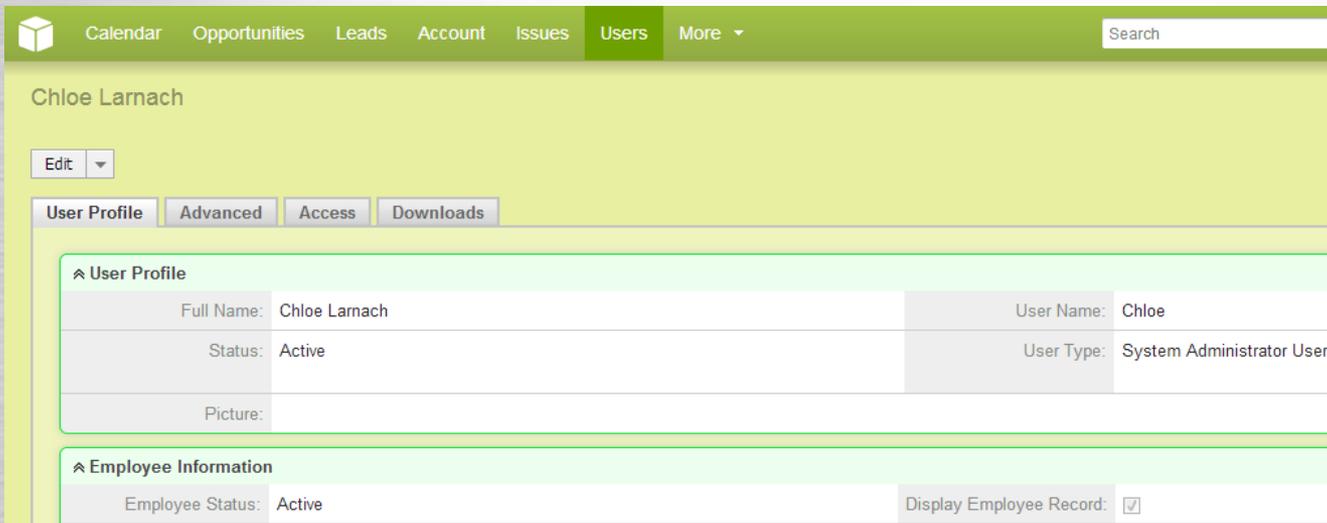
Close Subject

No Data

My Meetings

Save Cancel Reset User Preferences Reset Homepage

If you want to select the theme, **select it** and then **click save**. Instantly your Sugar interface will change to that theme.

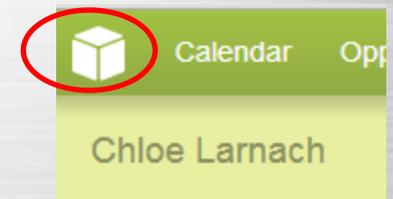
A screenshot of the SugarCRM user profile page for Chloe Larnach. The page has a green header with navigation tabs: Calendar, Opportunities, Leads, Account, Issues, Users, and More. A search bar is located in the top right. Below the header, the user's name "Chloe Larnach" is displayed. There is an "Edit" button and several tabs: "User Profile", "Advanced", "Access", and "Downloads". The "User Profile" tab is active, showing a table with the following information:

User Profile			
Full Name:	Chloe Larnach	User Name:	Chloe
Status:	Active	User Type:	System Administrator User
Picture:			

Employee Information			
Employee Status:	Active	Display Employee Record:	<input checked="" type="checkbox"/>

To access the home page again, simply click the Sugar Cube in the top left hand corner of the screen.



# Administrators can **enable** and **disable** Themes in the Administration Panel, select Themes

Administration

**Users**  
Create, edit, activate and deactivate users in Sugar. Create and manage teams and roles, including module- and field-level access.

<a href="#">User Management</a>	Manage user accounts and passwords	<a href="#">Role Management</a>	Manage role membership and properties
<a href="#">Team Management</a>	Manage team membership and properties	<a href="#">Password Management</a>	Manage password requirements and expiration

**Sugar Connect**  
Connect to the various SugarCRM services where you can access the SugarCRM forums and Sugar Wiki, search FAQs (Frequently Asked Questions), download the latest Sugar version, file and research or request new features and more.

<a href="#">License Management</a>	Manage license properties	<a href="#">Sugar Support Portal</a>	Access technical support and more
<a href="#">Sugar Updates</a>	Check for the latest Sugar version	<a href="#">Online Documentation</a>	View Sugar documentation for administrators and

**System**  
Configure the system-wide settings according to the specifications of your organization. Users can override some of the default locale settings within their user settings page.

<a href="#">System Settings</a>	Configure system-wide settings	<a href="#">Import Wizard</a>	Use the import wizard to easily import records into
<a href="#">Locale</a>	Set default localization settings for your system	<a href="#">Upgrade Wizard</a>	Upload and install Sugar upgrades
<a href="#">Currencies</a>	Set up currencies and conversion rates	<a href="#">Backups</a>	Backup Sugar files
<a href="#">Languages</a>	Manage which languages are available for users	<a href="#">Repair</a>	Check and repair Sugar
<a href="#">Search</a>		<a href="#">Diagnostic Tool</a>	Capture system configuration for diagnostics and
<a href="#">Connectors</a>		<a href="#">Tracker</a>	Enable/Disable tracking
<a href="#">Themes</a>		<a href="#">Generated PDF files</a>	Generated PDF files
<a href="#">Activity Streams</a>		<a href="#">Sugar Mobile application</a>	the Sugar Mobile application

**Themes**

Default theme: Pacific

Enabled Themes: Accessibility, Amore, Classic, Eco, Pacific, Right to Left

Disabled Themes: Right to Left

Save Cancel

You can drop and drag the theme from **Enabled** to **Disabled**, the select save.

Accounts Contacts Opportunities Reports Documents

**Themes**

Save Cancel

Default theme: Pacific

Enabled Themes: Accessibility, Amore, Classic, Eco, Right to Left, Pacific

Disabled Themes: Right to Left

Save Cancel





## SugarCRM Support

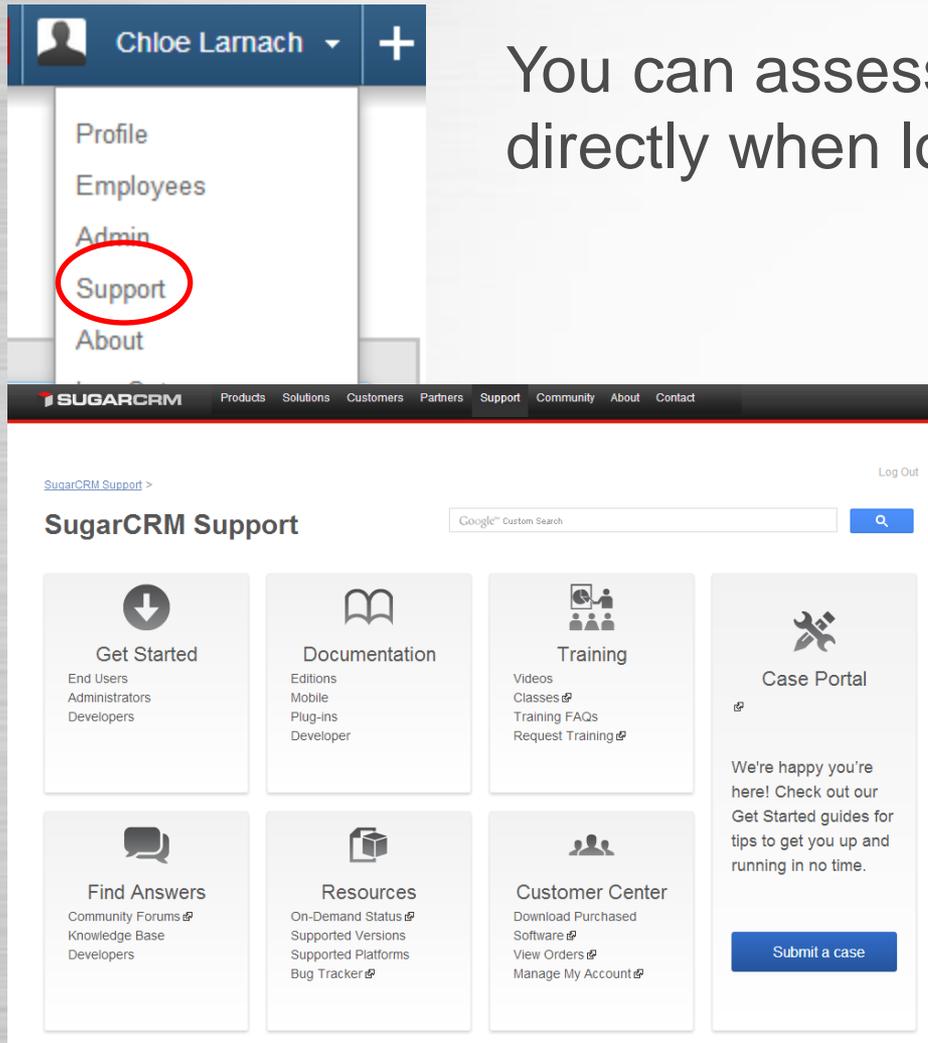
SugarCRM includes comprehensive support with each subscription.

FayeBSG also offers a variety of support options and packages tailored to your company needs, designed to meet specific development and implementation requirements.

	Sugar Professional	Sugar Corporate	Sugar Enterprise	Sugar Ultimate
<b>Support Hours</b>	8x5 (by region) 12x5 (optional)	12x5 (by region)	12x5 (by region)	24x7 (for P1 only) 12 x 5 (for P2 & P3)
<b>Number of Contacts</b>	2	3	4	5
<b>Number of Cases</b>	Unlimited	Unlimited	Unlimited	Unlimited
<b>P1 Response Time</b>	4 business hours	2 business hours	2 business hours	1 hour
<b>P2 Response Time</b>	1 business day	4 business hours	4 business hours	2 business hours
<b>P3 Response Time</b>	2 business days	1 business day	1 business day	4 business hours
<b>Phone Support</b>	No (optional)	No (optional)	Yes	Yes

## SugarCRM Support

You can assess and log an issue with Sugar directly when logged into Sugar.



The screenshot shows the SugarCRM user interface. At the top left, a user profile for 'Chloe Larnach' is visible with a dropdown menu containing 'Profile', 'Employees', 'Admin', 'Support', and 'About'. The 'Support' option is circled in red. Below this is a navigation bar with links for 'SUGARCRM', 'Products', 'Solutions', 'Customers', 'Partners', 'Support', 'Community', 'About', and 'Contact'. The main content area is titled 'SugarCRM Support' and features a search bar and several service tiles: 'Get Started' (with links for End Users, Administrators, Developers), 'Documentation' (with links for Editions, Mobile, Plug-Ins, Developer), 'Training' (with links for Videos, Classes, Training FAQs, Request Training), 'Case Portal' (with a 'Submit a case' button and text: 'We're happy you're here! Check out our Get Started guides for tips to get you up and running in no time.'), 'Find Answers' (with links for Community Forums, Knowledge Base, Developers), 'Resources' (with links for On-Demand Status, Supported Versions, Supported Platforms, Bug Tracker), and 'Customer Center' (with links for Download Purchased Software, View Orders, Manage My Account).

To arrange support, implementation, custom development or integrations directly through FayeBSG call 818.227.5130 or email [support@fayebsg.com](mailto:support@fayebsg.com)



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