



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[®]





SUGARCRM[®]

Deployment Options

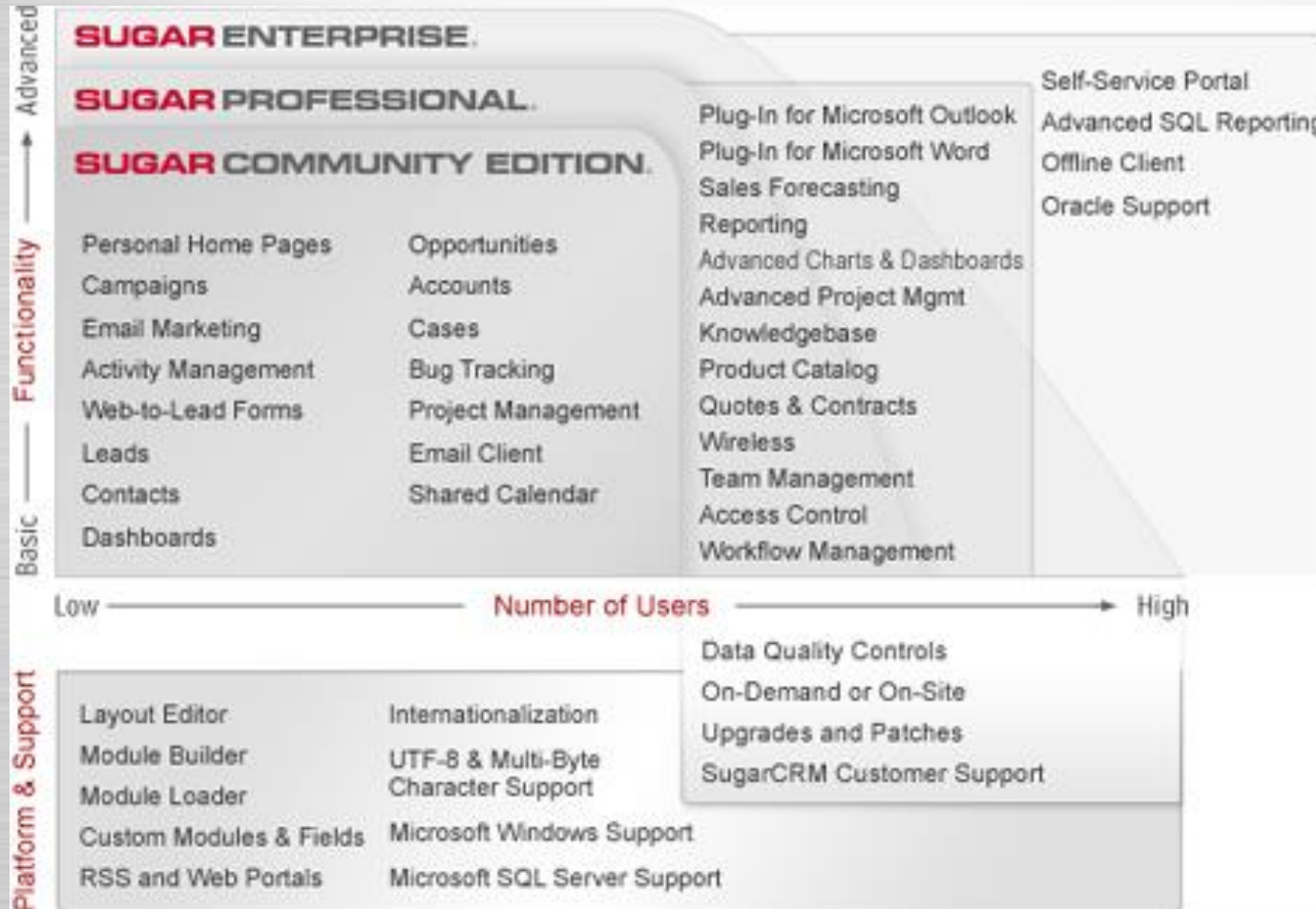
- Sugar On-Demand:** This is the standard software-as-a-service, cloud offer. Sugar hosts and manages your instance in their cloud.
- Sugar Private Cloud:** Premium On-Demand Solution. Private Cloud is an enterprise-grade cloud offering.
- Public Cloud:** Manage from your choice of cloud services. Choose 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



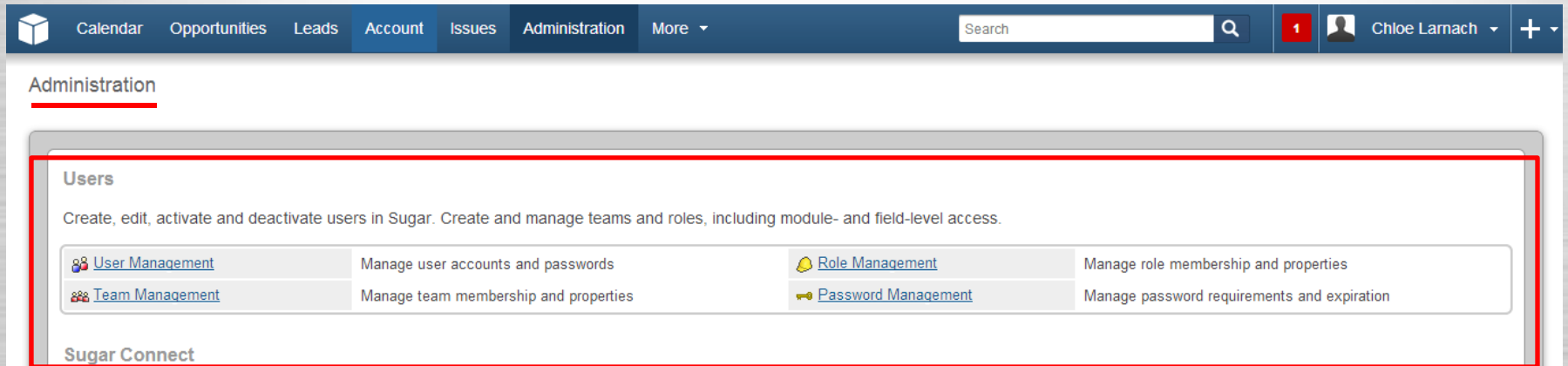
Editions



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 modules like Calendar, Opportunities, Leads, Account, Issues, Administration, and More. A search bar and user profile (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.

User Management	Manage user accounts and passwords	Role Management	Manage role membership and properties
Team Management	Manage team membership and properties	Password Management	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:

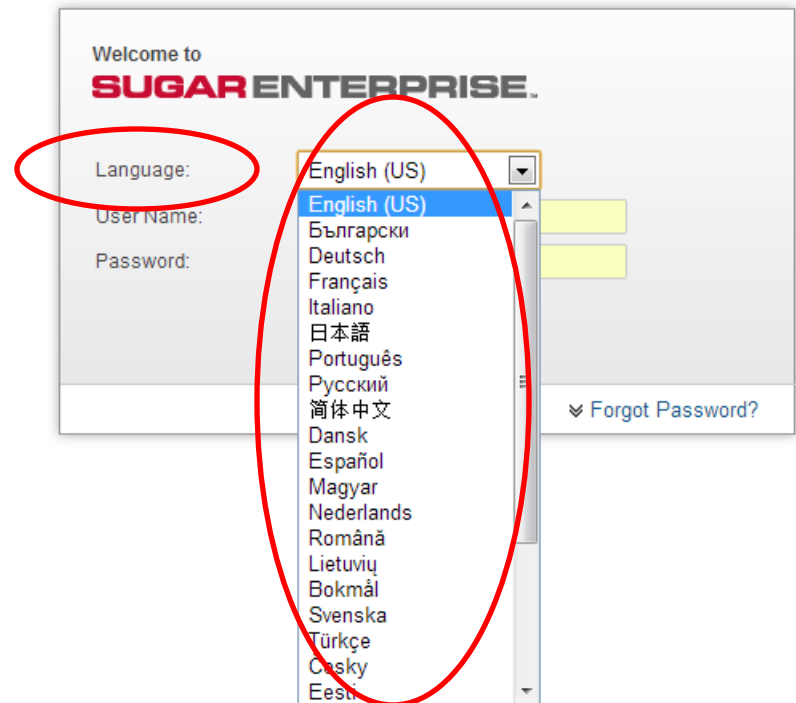
- All:** All users who are assigned to the role.
- Owner:** The person who created the record.
- None:** Nobody can perform the action.
- Not Set:** Ensures that the role does not affect a particular setting. That is, the role allows the action.

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.

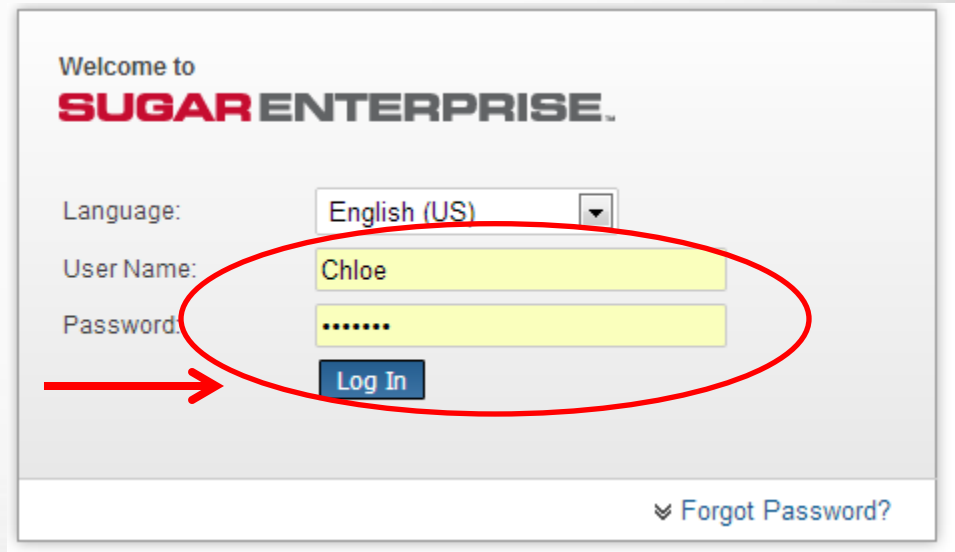
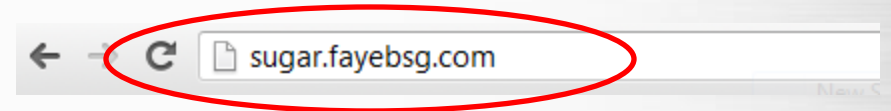
Changing your language preference will only change the system labels, like the module tab names, not the record data that you are inputting or have already entered into Sugar.

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.

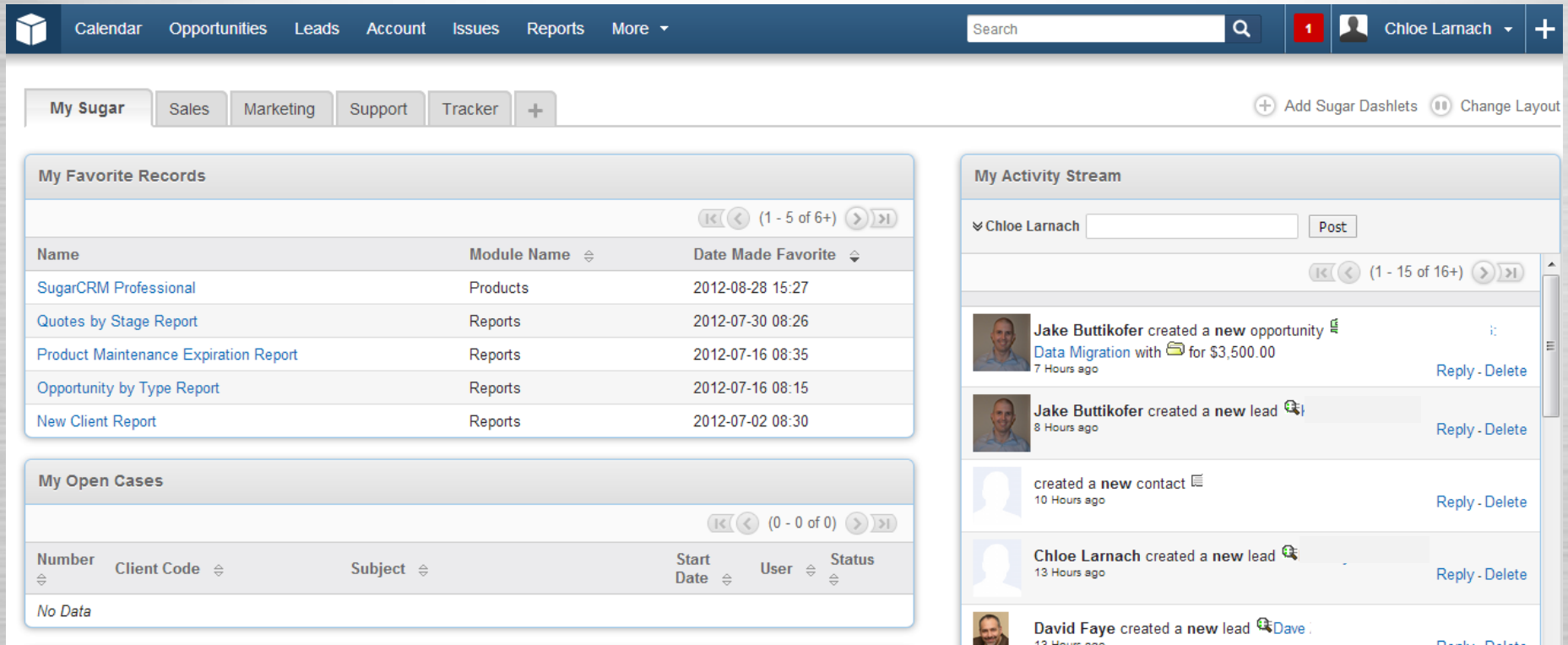
Logging into SugarCRM

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**.



The screenshot shows the SugarCRM Home Page interface. At the top, there is a navigation bar with tabs for Calendar, Opportunities, Leads, Account, Issues, Reports, and More. A search bar and user profile for Chloe Larnach are also visible. Below the navigation bar, there are tabs for My Sugar, Sales, Marketing, Support, and Tracker. The main content area is divided into two columns. The left column contains 'My Favorite Records' and 'My Open Cases'. The right column contains 'My Activity Stream'.

My Favorite Records

Name	Module Name	Date Made Favorite
SugarCRM Professional	Products	2012-08-28 15:27
Quotes by Stage Report	Reports	2012-07-30 08:26
Product Maintenance Expiration Report	Reports	2012-07-16 08:35
Opportunity by Type Report	Reports	2012-07-16 08:15
New Client Report	Reports	2012-07-02 08:30

My Open Cases

Number	Client Code	Subject	Start Date	User	Status
No Data					

My Activity Stream

- Chloe Larnach
- 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](#)

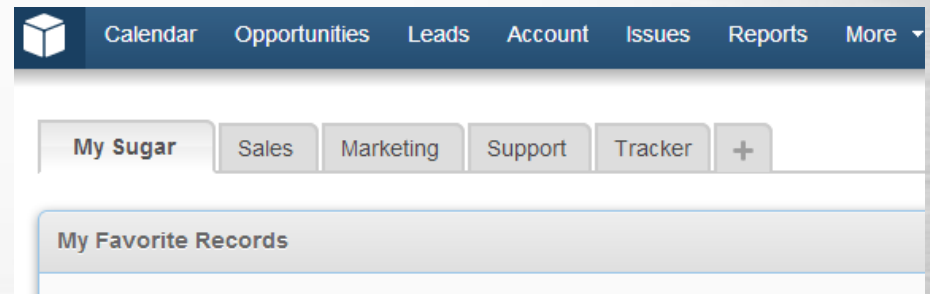


Let's go over themes.

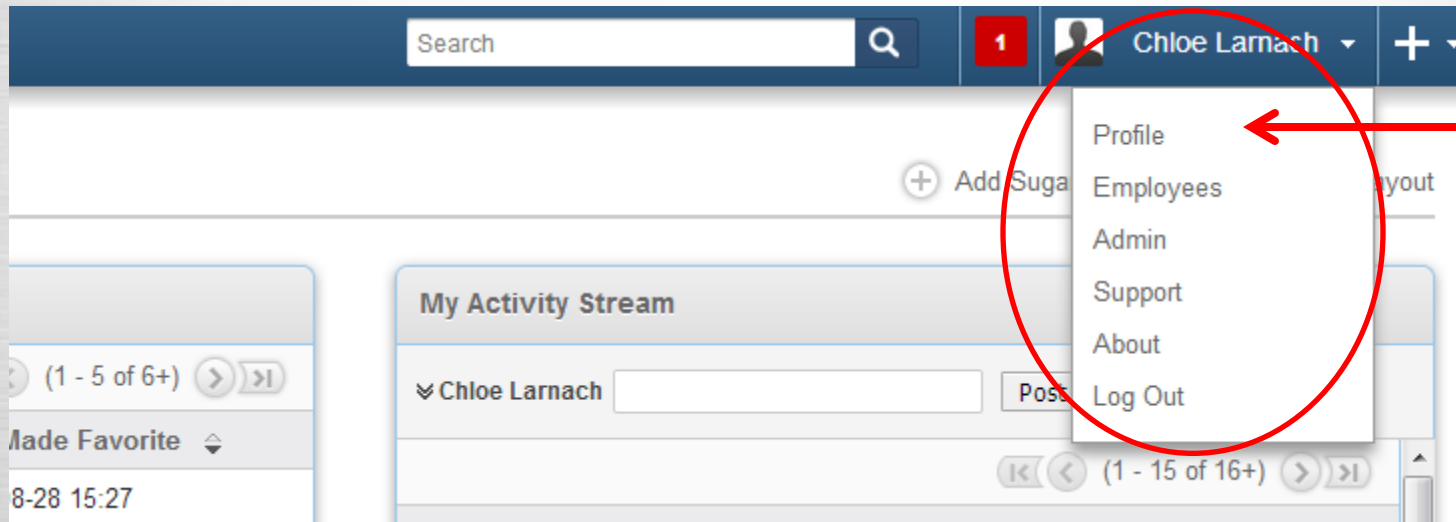
You can change the look and feel of your Sugar whenever you want to. It is not determined by your system administrator. You can do this by selecting the themes you want to use.

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 **Tabs and Action**.

The default theme is **Pacific**.

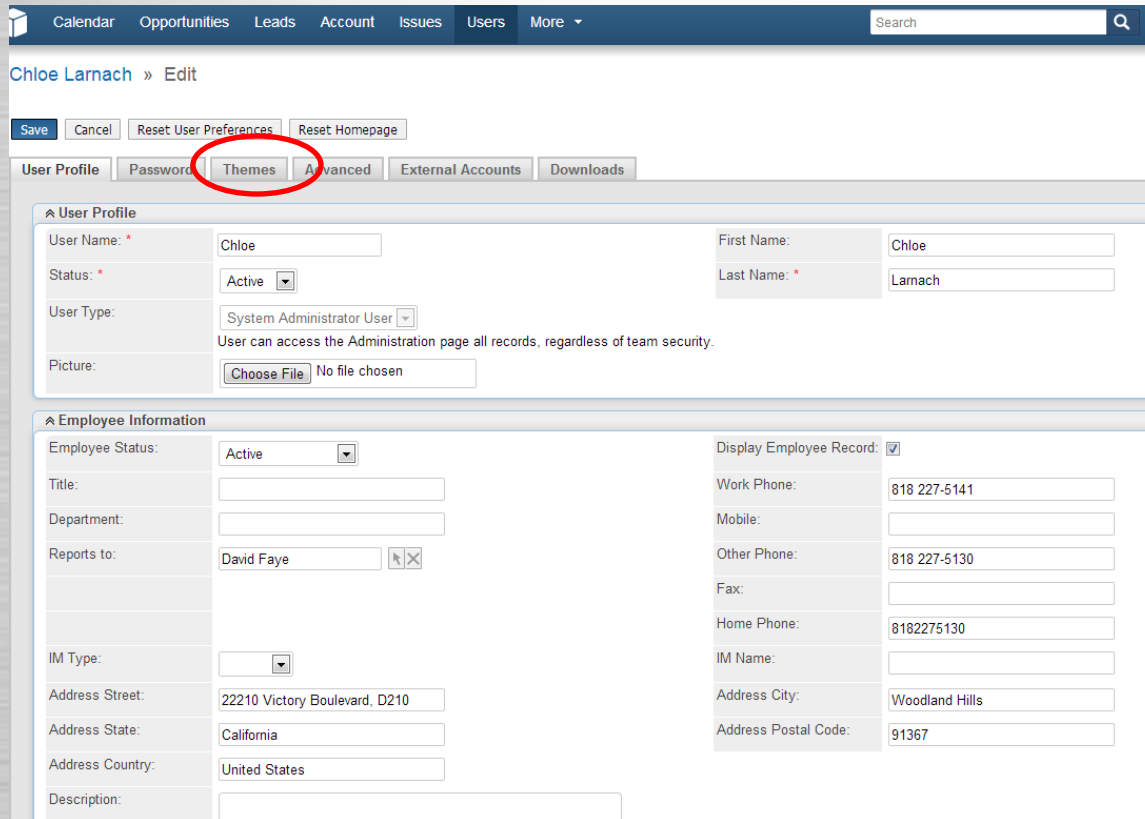


To change the theme – navigate to the users profile located on the systems link menu.



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

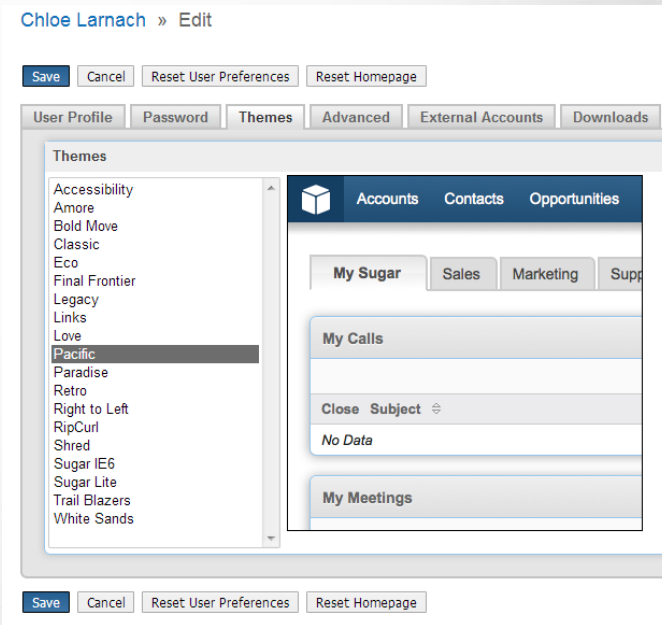
User Profile Password **Themes** Advanced External Accounts Downloads

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

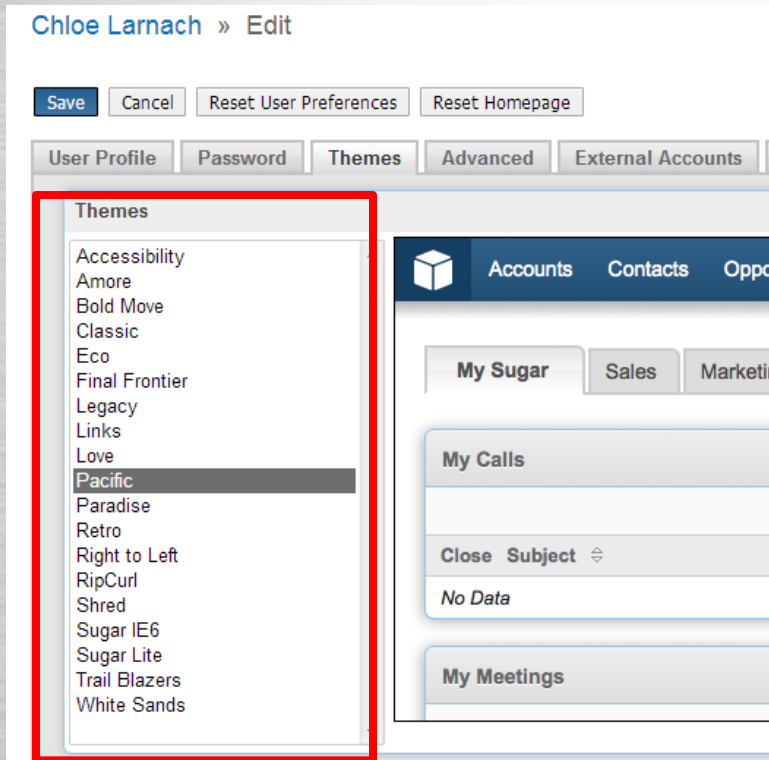
Close Subject ⇅

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
- Bold Move
- Classic
- Eco
- Final Frontier
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Accounts Contacts Oppo

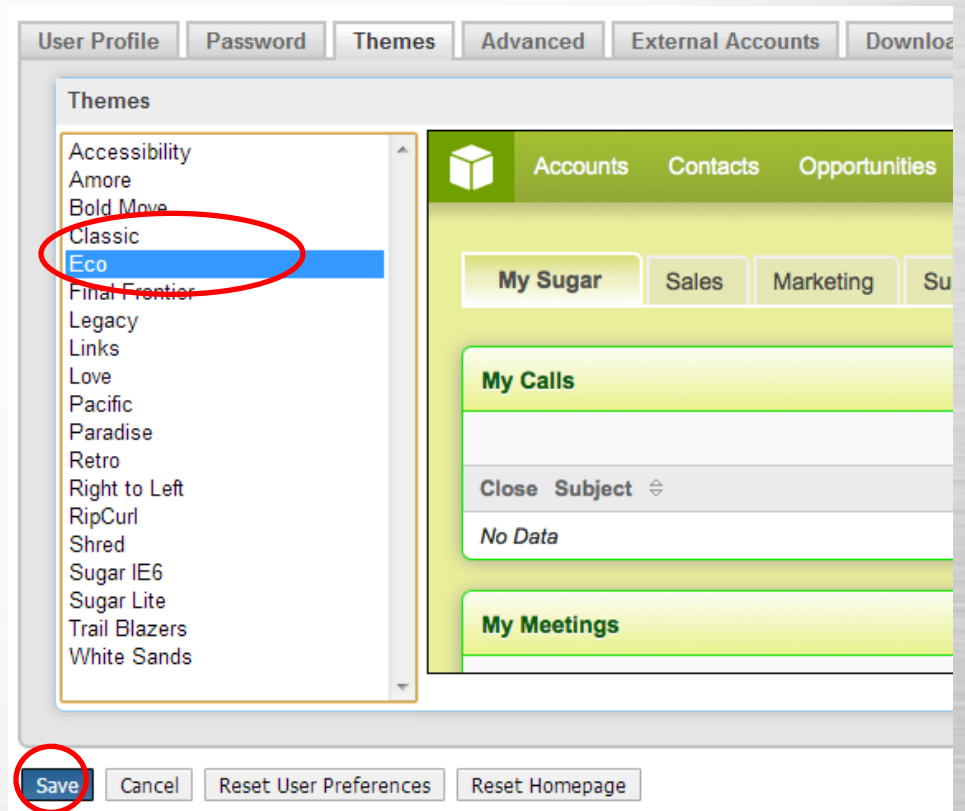
My Sugar Sales Marketin

My Calls

Close Subject

No Data

My Meetings



User Profile Password Themes Advanced External Accounts Download

Themes

- Accessibility
- Amore
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Accounts Contacts Opportunities

My Sugar Sales Marketing Su

My Calls

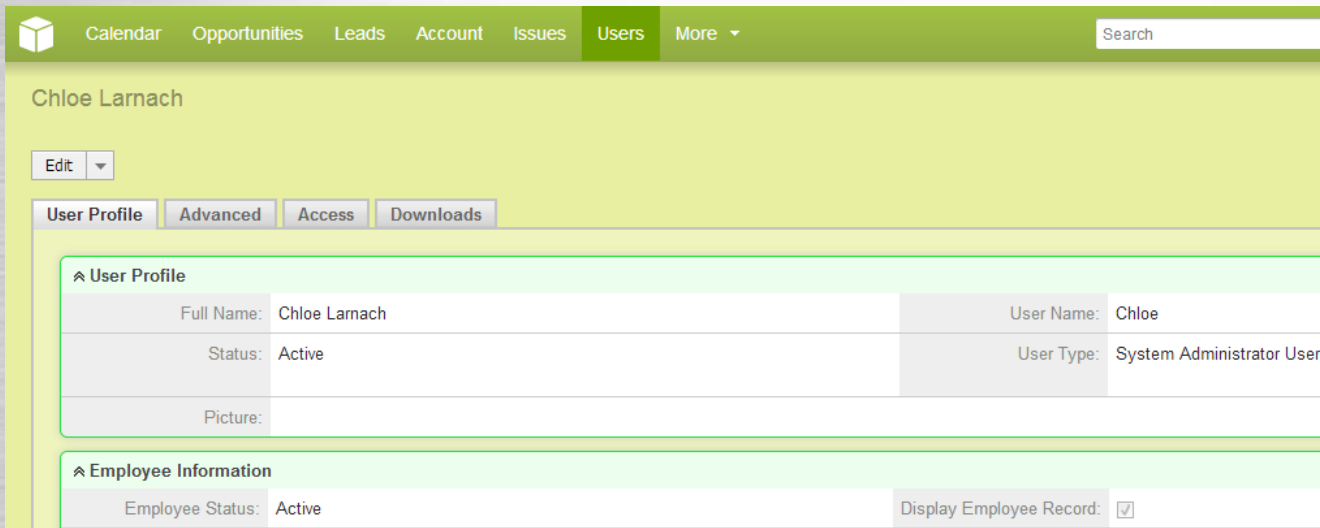
Close Subject

No Data

My Meetings

Save Cancel Reset User Preferences Reset Homepage

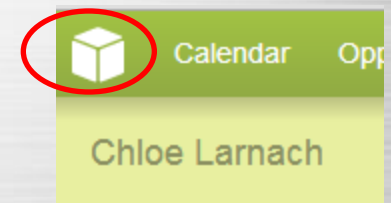
If you want to select the theme, **select it** and then **click save**. Instantly your Sugar interface will change to that theme.

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 of the header. Below the header, the user's name "Chloe Larnach" is displayed. There is an "Edit" button with a dropdown arrow. Below that are tabs for "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.

User Management	Manage user accounts and passwords	Role Management	Manage role membership and properties
Team Management	Manage team membership and properties	Password Management	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.

License Management	Manage license properties	Sugar Support Portal	Access technical support and more
Sugar Updates	Check for the latest Sugar version	Online Documentation	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.

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

Themes

Default theme: Pacific

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

Disabled Themes: Right to Left

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	Disabled Themes
Accessibility	
Amore	
Classic	
Eco	
Right to Left	Right to Left
Pacific	

Save Cancel



SugarCRM Support

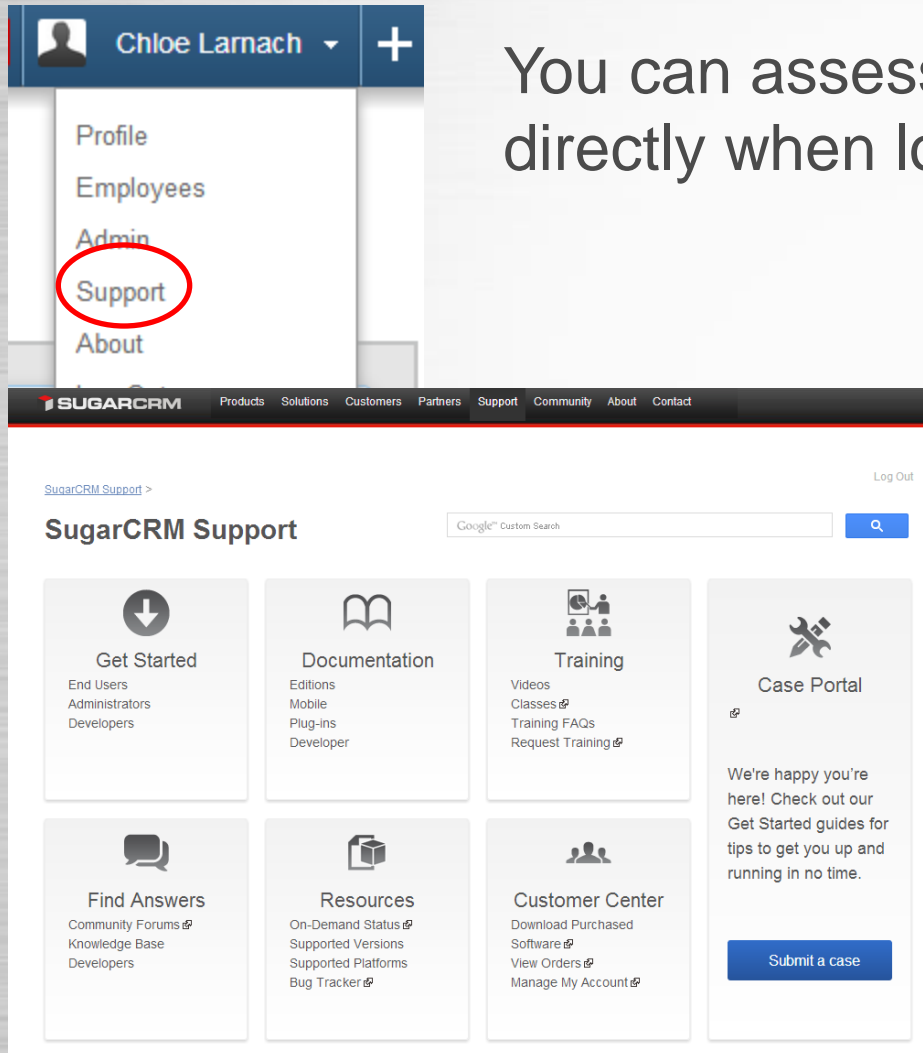
SugarCRM includes comprehensive support with each subscription.

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
Support Hours	8x5 (by region) 12x5 (optional)	12x5 (by region)	12x5 (by region)	24x7 (for P1 only) 12 x 5 (for P2 & P3)
Number of Contacts	2	3	4	5
Number of Cases	Unlimited	Unlimited	Unlimited	Unlimited
P1 Response Time	4 business hours	2 business hours	2 business hours	1 hour
P2 Response Time	1 business day	4 business hours	4 business hours	2 business hours
P3 Response Time	2 business days	1 business day	1 business day	4 business hours
Phone Support	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 '+' icon. A dropdown menu is open, listing 'Profile', 'Employees', 'Admin', 'Support', and 'About'. The 'Support' option is circled in red. Below the menu is a navigation bar with 'SUGARCRM' and links for 'Products', 'Solutions', 'Customers', 'Partners', 'Support', 'Community', 'About', and 'Contact'. The main content area is titled 'SugarCRM Support' and features a search bar. Below the search bar are several tiles: 'Get Started' (with a download icon), 'Documentation' (with a book icon), 'Training' (with a group icon), 'Case Portal' (with a wrench icon), 'Find Answers' (with a speech bubble icon), 'Resources' (with a cube icon), and 'Customer Center' (with a group icon). The 'Case Portal' tile includes a 'Submit a case' button.

To arrange support, implementation, custom development or integrations directly through FayeBSG call 818.227.5130 or email support@fayebsg.com



Faye Business Systems Group

1.818.227.5130

info@fayebsg.com

www.fayebsg.com