Faye Business Systems Group

Getting Started with Sugar

SUGARCRM

Themes and Languages

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

SUGAR PRIVATE CLOUD.
SUGAR ON-DEMAND.
SUGAR on PUBLIC CLOUD
SUGAR ON-SITE.
SUGAR on PARTNER CLOUD

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.

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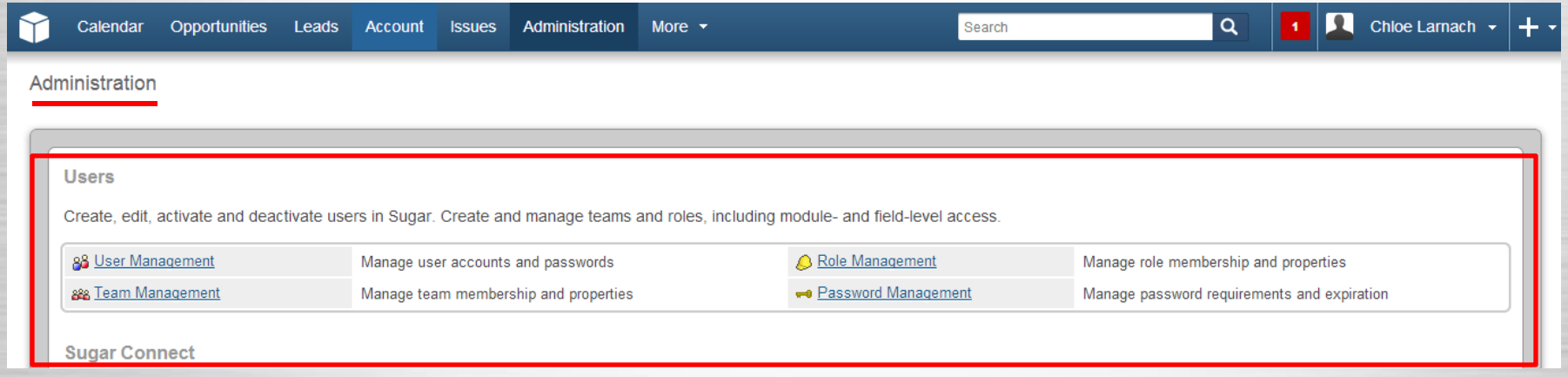
Editions

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**



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

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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:

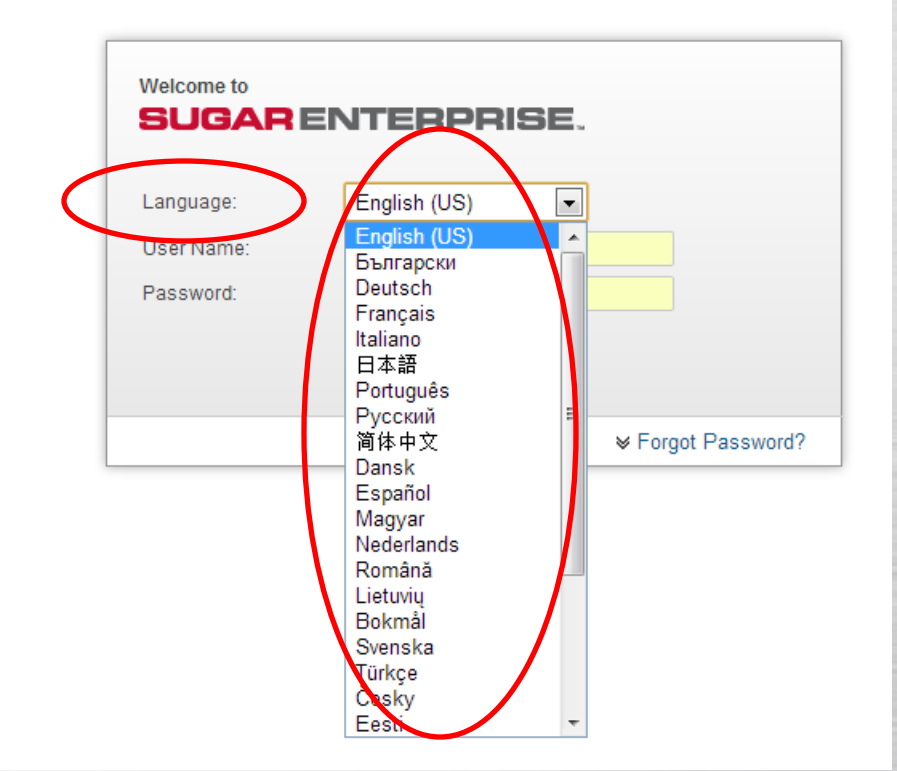
- **All**: All users who are assigned to the role.
- **Owner**: The person who created the record.
- **None**: Nobody can perform the action.
- **Not Set**: Ensures that the role does not affect a particular setting. That is, the role allows the action.

Setting Languages

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

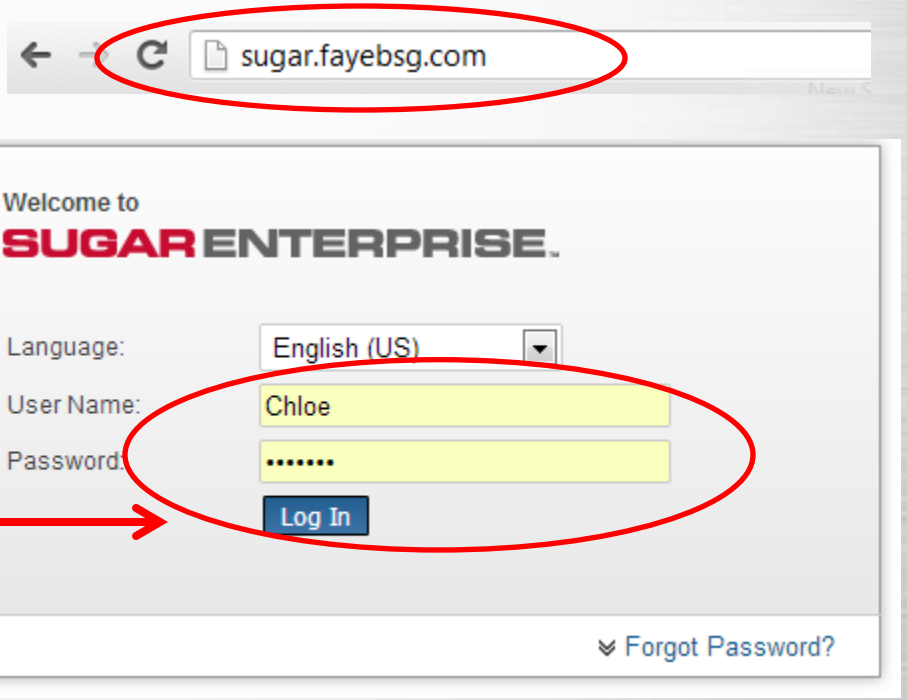
Any additional languages needed must be added by your system administrator.

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.



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.

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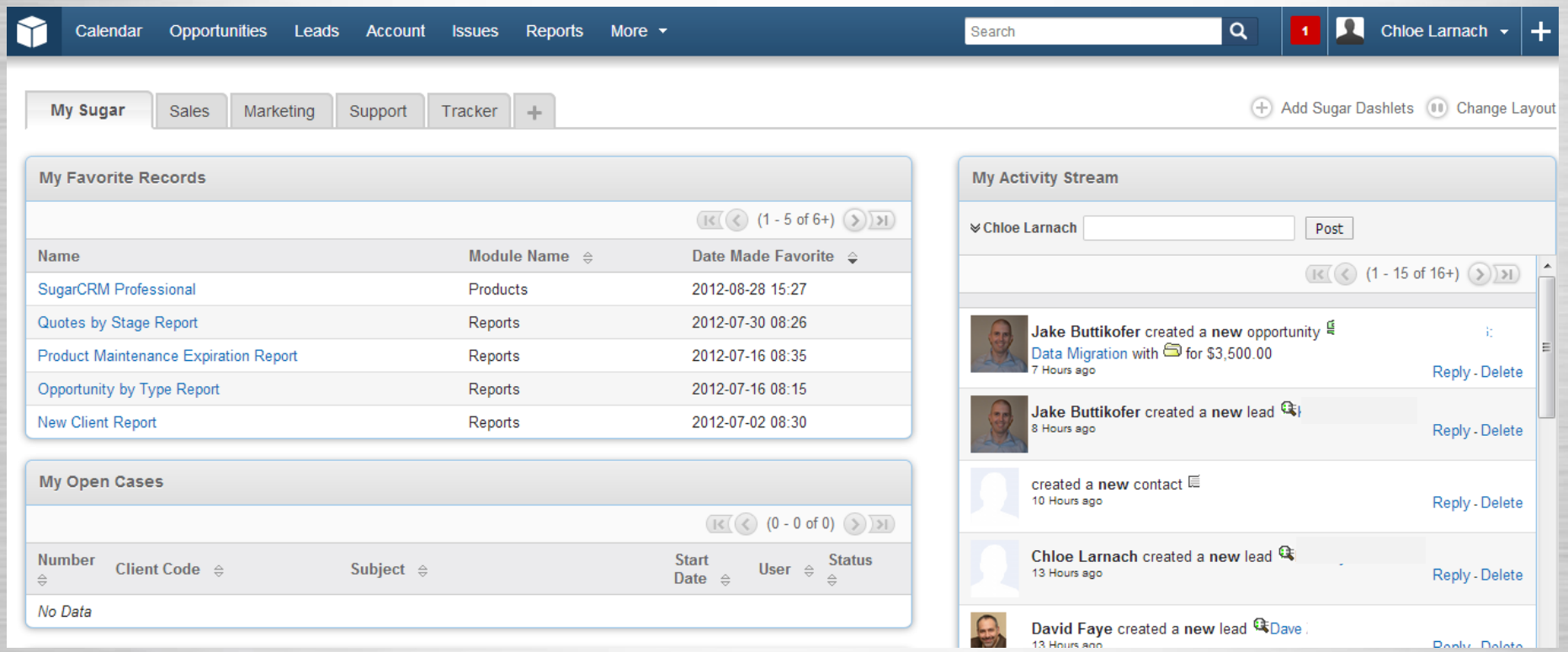
We are now looking at the **Sugar Home Page**.



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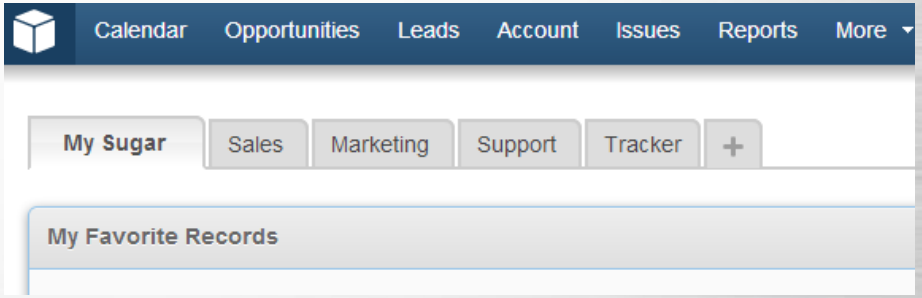
Let's go over themes.

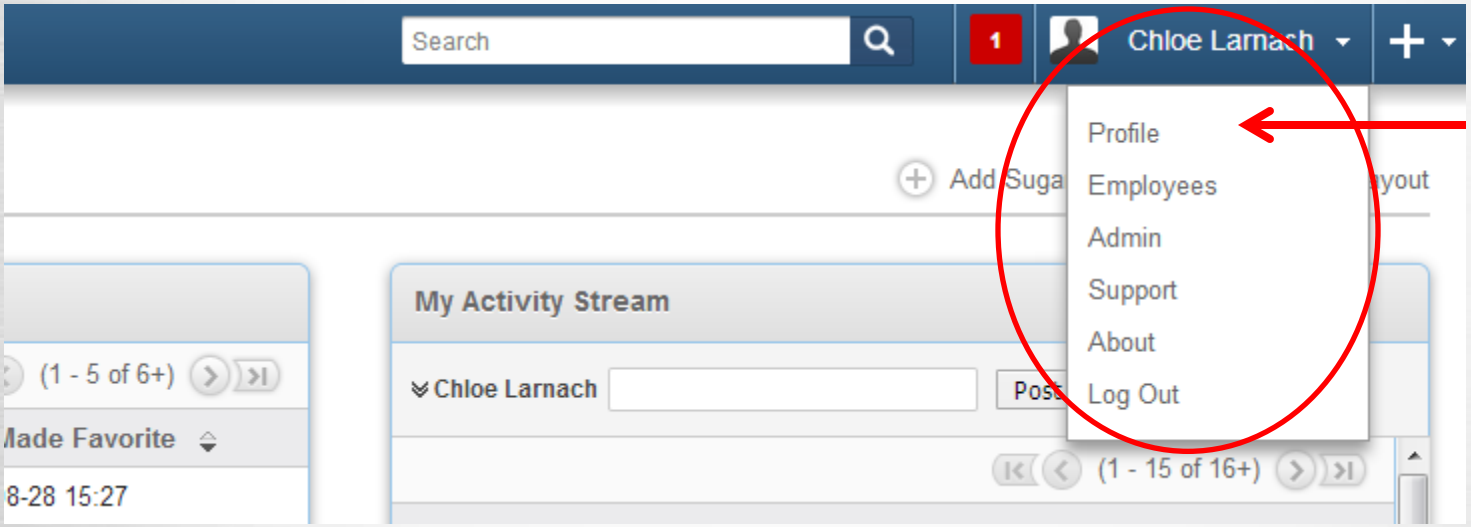
You can change the look and feel of your Sugar whenever you want to. It is not determined by your system administrator. You can do this by selecting the themes you want to use.

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

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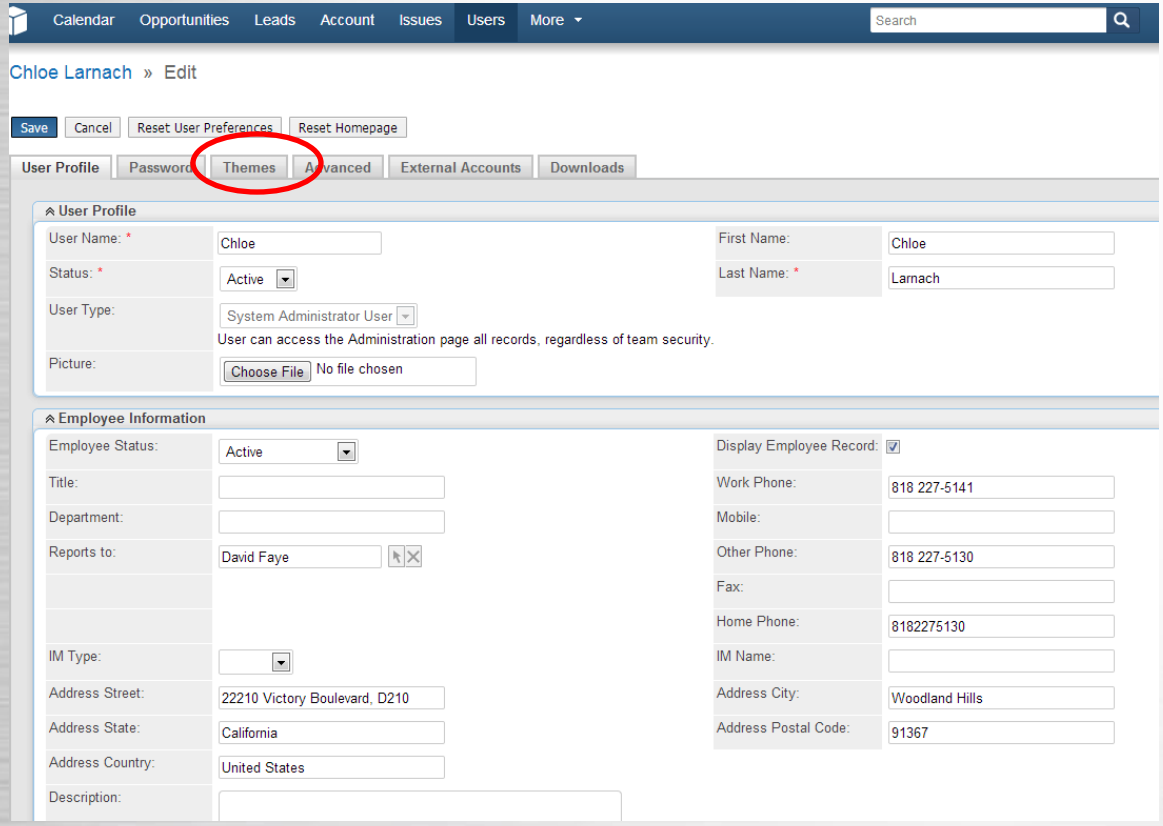
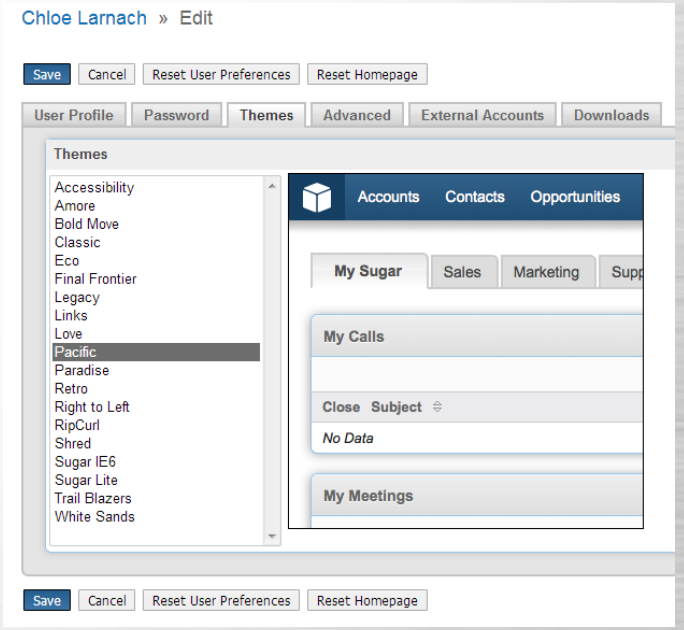
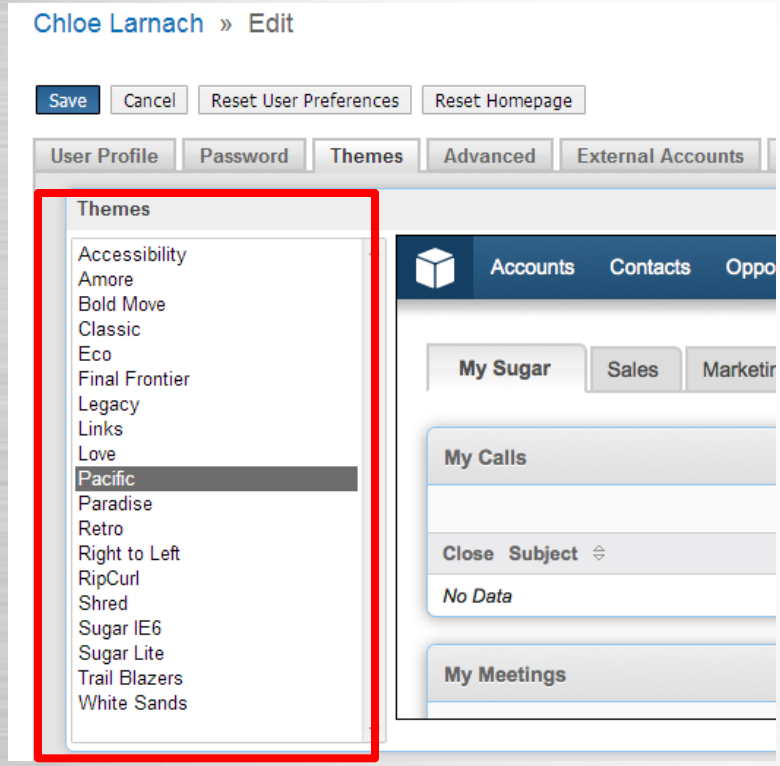
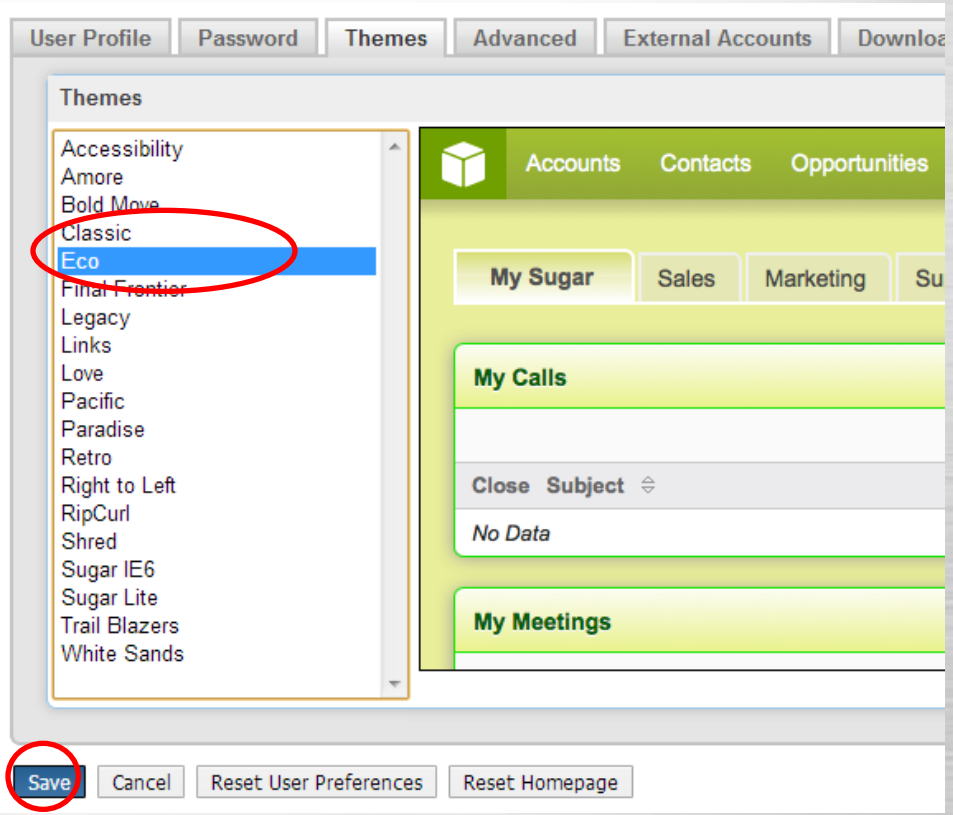
In the profile you can see that you have access to a theme tab which you can select. This tab allows you to select the theme of your view of Sugar.



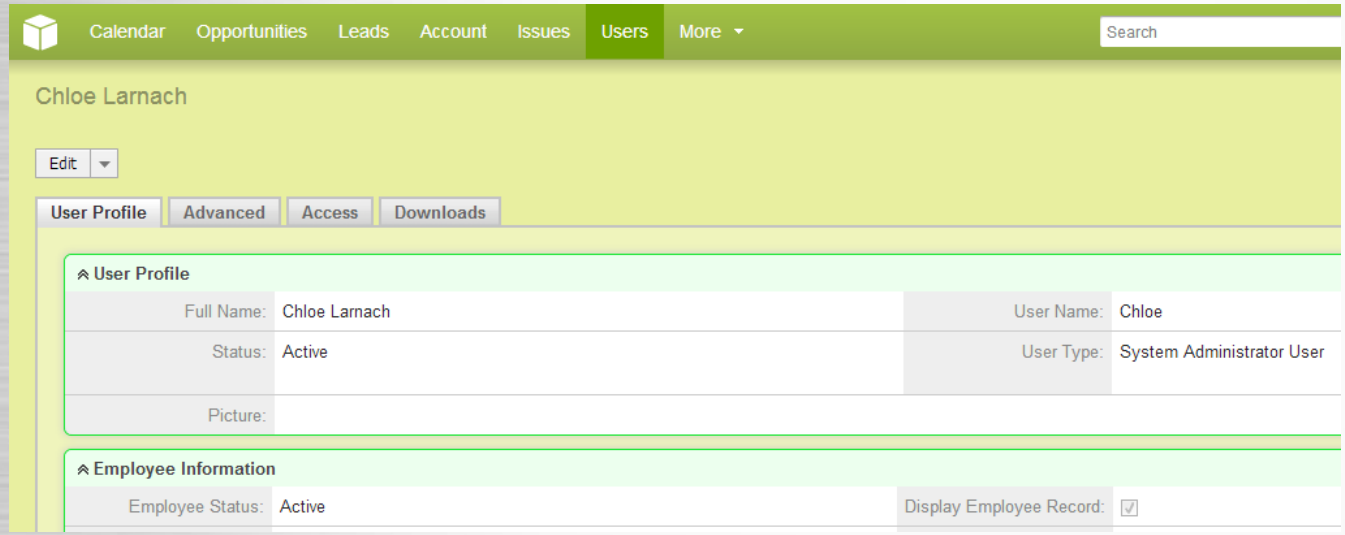


You can get a quick preview of each theme by selecting a theme on the left side of the screen, and view the preview on the right side.

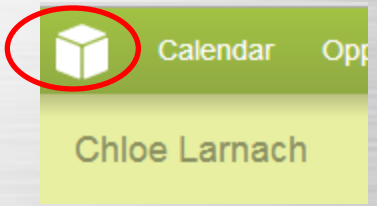




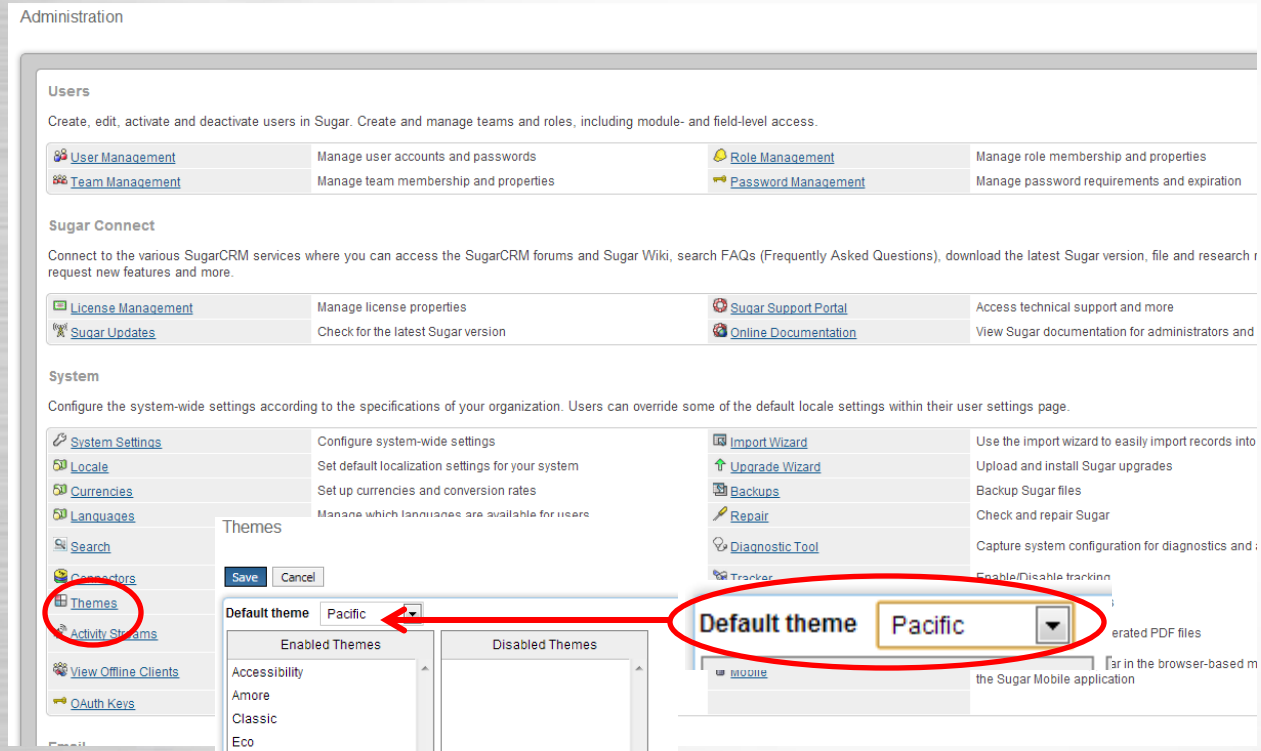
If you want to select the theme, **select it** and then **click save**. Instantly your Sugar interface will change to that theme.



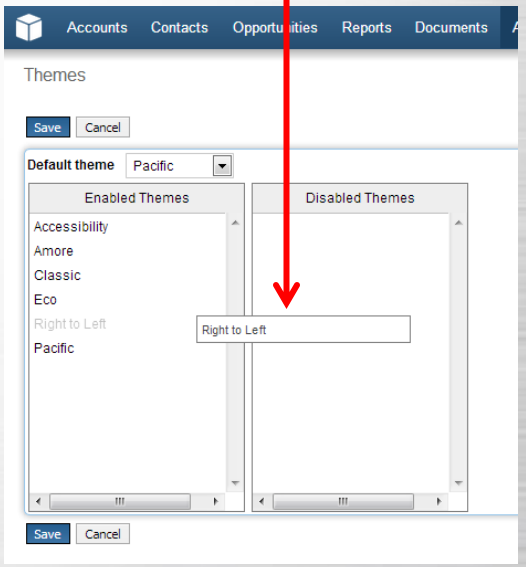
To access the home page again, simply click the Sugar Cube in the top left hand corner of the screen.



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



You can drop and drag the theme from **Enable to Disable**, the select save.



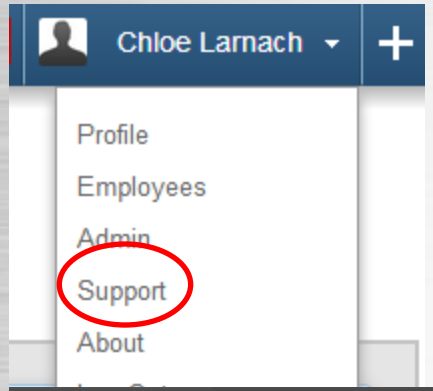
SugarCRM Support

SugarCRM includes comprehensive support with each subscription.

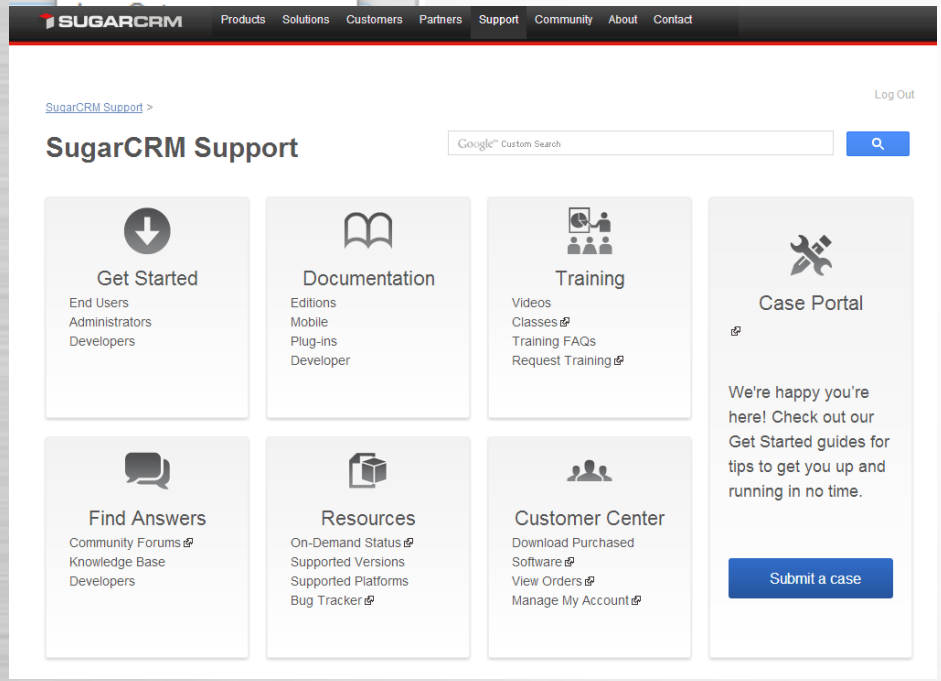
FayeBSG also offers a variety of support options and packages tailored to your company needs, designed to meet specific development and implementation requirements.

	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.



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

Faye Business Systems Group

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