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Titolo	Implementing SugarCRM 5.x : install, configure, and administer a robust customer relationship management system using SugarCRM // Angel Magana, Michael Whitehead
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Altri autori (Persone)	MaganaAngel WhiteheadMichael
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Soggetti	Open source software Customer relations - Management
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Livello bibliografico	Monografia
Note generali	Includes index.
Nota di contenuto	Cover; Copyright; Credits; About the Authors; About the Reviewer; Table of Contents; Preface; Chapter 1: Doing Business-Better; Small and medium-size businesses: The good, the bad, and the ugly; Typical small business needs; The business benefits of CRM technology; What is Customer Relationship Management?; CRM customization; What will a CRM do for my business?; What are my CRM options?; Deployment options; What is SugarCRM?; Why choose SugarCRM?; How will this book help me tailor SugarCRM to my business?; Our case study: RayDoc Carpets, Doors, and Windows; Our hero: Doc What does the future hold for RayDoc? Summary; Chapter 2: One Size Does Not Fit All-CRM Your Way; Identifying the CRM needs of your business; Which business activities will be a part of your CRM?; Account and contact management; Lead and opportunity management; Sales Force Automation (SFA); Sales analytics; Customer service and contracts; Knowledge management; Activity management; E-mail management; Marketing automation; Employee directory; Interface consolidation; Document management; Reporting and analytics; Business models and their specific requirements; B2B or B2C?; Products

or Services?

Average transaction value, sales cycle, and the recurring business model Business location; Size does matter: Two or two hundred?; International needs; How do I make shrink-wrapped software suit my business?; Customer-centric business management; Planning your installation; Your CRM data hub; Requirement analysis; RayDoc CRM requirements; Your CRM requirements worksheet; Summary; Chapter 3: CRM Deployment Options; Deployment alternatives; Choosing a server operating system; Specifying your server hardware; Web-based application platforms; Backup and security considerations; Server security

Emergencies and natural disasters Bandwidth capacity and reliability considerations; Performing the installation; Summary; Chapter 4: SugarCRM Basics; CRM processes and terminology; Accessing the SugarCRM system; A quick tour of SugarCRM; Themes; SugarCRM basics: Data relationships; SugarCRM navigation: Accounts and contacts; List and detail view screens; Main panel and subpanels; Edit view screens; Data relationships and searching; SugarCRM basics: Security; The sales pipeline: Leads and opportunities; Aggregating opportunities: The sales pipeline; The dashboard; Calendaring; Sales activities

Creating a note Creating a task; Scheduling a call or meeting; Managing e-mails; E-mail templates; Advanced user-interface features; Printing information; Getting help; Exporting information; Mass operations; Input business card; Create from vCard; Quick new item; Summary; Chapter 5: Extending The Business Role of Your SugarCRM System; Resetting the database; Marketing campaigns; Targets, leads and contacts; Creating an e-mail template; Adding targets to the campaign; The mass e-mailing queue; Campaign metrics; Summary; Chapter 6: The SugarCRM Ecosystem; SugarCRM Community Edition SugarForge.org and SugarExchange.com

Sommario/riassunto

Install, configure, and administer a robust Customer Relationship Management system using SugarCRM
