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Sugar Plug-in for Microsoft Excel

Version 6.0.0

Sugar Plug-in for Microsoft Excel
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www.sugarcrm.com

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This guide describes how to install and use Sugar Plug-in for Microsoft Excel 2007 version 6.0.0 to create and manage Sugar records in Excel 2007.

Sugar Plug-in for Excel enables users to view and manage Sugar modules in Excel for Sugar Enterprise, Sugar Professional, and Sugar Express. You can edit and delete existing Sugar fields in Excel and save the updated information to the Sugar database.

Installing Sugar Plug-in for Microsoft Excel

Download the *SugarExcel.zip* file from the SugarCRM Web site.

This file contains the following components:

- Office2007PIA
- VSTOSERuntime
- ExcaliburSetup.msi
- setup.exe

To install Sugar Plug-in for Microsoft Excel

1. Open the *Sugar_Plugin_for_Excel_2007_6.0.0* zip file and double-click *setup.exe*.

   The Welcome page displays on the screen.
2. Click **Next**.
3. By default, the installer installs the Sugar Plug-in for Excel in the Programs folder. To specify a different location, click **Browse** and navigate to the desired folder.
4. Click **Next**.

   The Confirm Installation dialog box displays on the screen.
5. Click **Next** to begin the installation process.

   The Installing SugarExcel dialog box displays on the screen.

   When installation is complete, the installer displays the Installation Complete dialog box with a message stating that SugarExcel has been successfully installed.
6. Click **Close**.

Viewing and Managing Sugar Modules in Excel

Sugar Plug-in for Excel enables you to create, edit, and delete records for Sugar modules in Excel. The updated data is automatically saved to the Sugar database.

To view and manage Sugar records in Excel

1. Launch Excel.

   The Home tab displays the SugarCRM drop-down menu at the right-hand corner of the screen.

2. From the SugarCRM drop-down menu in Excel, select **Settings**.
3. In the Connection tab, enter your Sugar username, password, and the URL of your Sugar application, and click **OK**.

   If you can connect successfully, you are logged into Sugar.

4. In the Modules tab of the Settings dialog box, click **Select Modules** and then click **Refresh List** to view the available modules.

   By default, some modules such as Accounts and Contacts are already selected.

5. Click in the selection box to select one or more modules; click **OK**.
6. From the Sugar menu, select **Query Wizard**.

   The selected modules are listed in the Modules drop-down list.

7. From the Module drop-down list, select the module you want to access.
8. From the Field drop-down list, select the field that you want to use to filter the records that appear in Excel.

Note: The names of the drop-down field values that are pulled into Excel through the plug-in are the display labels. However, you can use either the display labels or the database names for drop-down fields when creating new records and updating existing records through the plug-in.

9. From the Operator drop-down list, select an operator such as Equals, Starts With, and so on.
10. In the Value field, enter the appropriate value such as a letter, a partial name, or the full name.
11. To specify additional fields, click **Add Condition**, select either the AND or OR operator, and select the field, operator, and value.

    You can add multiple conditions. To remove a condition, click **Remove Condition**.

12. Click **Run** to view the query results.

    The search results show records that match the query.

13. To edit data, enter the new value in the appropriate field. Select the field or the row, and from the SugarCRM menu select **Update**. Or, highlight the field or row, right-click, and select **Update in Sugar**.

    The record is updated in Sugar.

14. To view the updated record in Sugar, select a field from the record, right-click, and select **View in Sugar**.

    The record in Sugar reflects the updated values.

15. To delete a field value or a record, select the field or the row respectively, and from the SugarCRM menu, select **Delete**; right-click and select **Update in Sugar**.

    The field value or record is deleted from the module.

To add new Sugar records in Excel

1. To add a new record, select the module in the Query Wizard and click **Add Fields**.

   The spreadsheet displays the module name along with the existing fields such as id, assigned user, and so on.

2. Enter values for one or more of these fields in Excel.
3. From the SugarCRM menu, select **Insert**

   The new record is added to the Sugar database.

Viewing Reports in Excel

You can view Sugar reports in Excel and save the data as Excel spreadsheets. When you view a Sugar report in Excel, you can refresh the data at any time to ensure that you are viewing the latest data in Excel. You can distribute Excel spreadsheets containing Sugar report data to other users of Sugar Plug-in for Excel. If users have the appropriate team and role permissions to view the reports in Sugar, they will be able to view and refresh the report data in the Excel spreadsheet.

Note: Viewing reports through Sugar Plug-in for Excel is supported only for Sugar Enterprise and Sugar Professional.

To view reports in Excel

1. From the SugarCRM menu, choose **Select Reports** to view a list of existing reports in Sugar.
2. Drag a report from the list to the Excel spreadsheet to view its data.
3. To view the report as a chart, highlight the report in the spreadsheet, and from Excel's Insert menu, select the chart type.

   The chart displays in the spreadsheet.

4. To refresh the report data, click **Refresh Data**.
5. To view a list of reports in the Excel workbook, click **Reports on Sheet**.