

SoloManage

SUAGRCRM INTEGRATION GUIDE

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SoloManage

SUGARCRM INTEGRATION GUIDE

INTRODUCTION

This guide describes the steps required to install and configure SoloManage for integration with SugarCRM.

Before using this guide, it is recommended that you also read the Installation and Quick start guide, which provides an introduction to the SoloManage software.

The steps required to complete this integration assume a level of reasonable level of familiarity with the operation of Windows Server systems, and Active Directory.



USING SOLOMANAGE WITH SUGARCRM

SugarCRM

SugarCRM is commercial open source customer relationship management (CRM) software, supplied by SugarCRM Inc. SoloManage provides optional integration with SugarCRM projects and tasks, allowing users of SoloManage to complete timesheets and billings using the client, project and task details contains in a SugarCRM installation.

Integration with SugarCRM is optional. SoloManage will provide all of its functionality without integration.

A working and configured installation of SugarCRM is necessary for integration. If you do not already have SugarCRM installed, download the installation and follow the configuration steps described by SugarCRM Inc at <http://www.sugarcrm.com/crm/> . Some versions of SugarCRM are free.

Jitterbit

Jitterbit is open source software which performs the tasks necessary to integrate information between different applications. Jitterbit is the means by which SugarCRM and SoloManage exchange data.

Jitterbit is provided by Jitterbit Inc. A working and configured installation of Jitterbit is also necessary for the integration between SoloManage and SugarCRM. Follow the links and instructions at <http://www.jitterbit.com/> to download and install the Jitterbit Server and the Jitterbit Integration Environment

When installing the Jitterbit software, please follow carefully the installation notes from Jitterbit about creating a user name for use with the Postgres database. Creating a username in the way required may not always be possible on a server which is also acting as a domain controller. In that case, choose a different server to host the Jitterbit server.

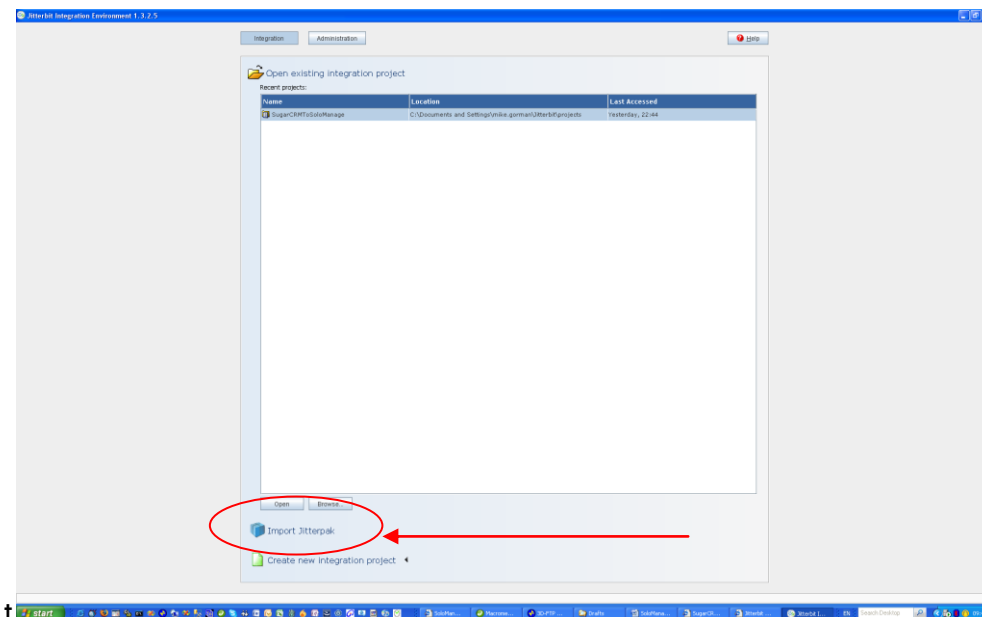
JitterPaks

The way in which Jitterbit can provide the platform for data integration is by a tool known as a JitterPak. Jitterpaks are small software packages which are configured for the particular systems you wish to integrate, in this case SugarCRM and SoloManage. The SoloManage JitterPak is available for download at <http://www.solomanage.com/downloadsetupfiles.htm>

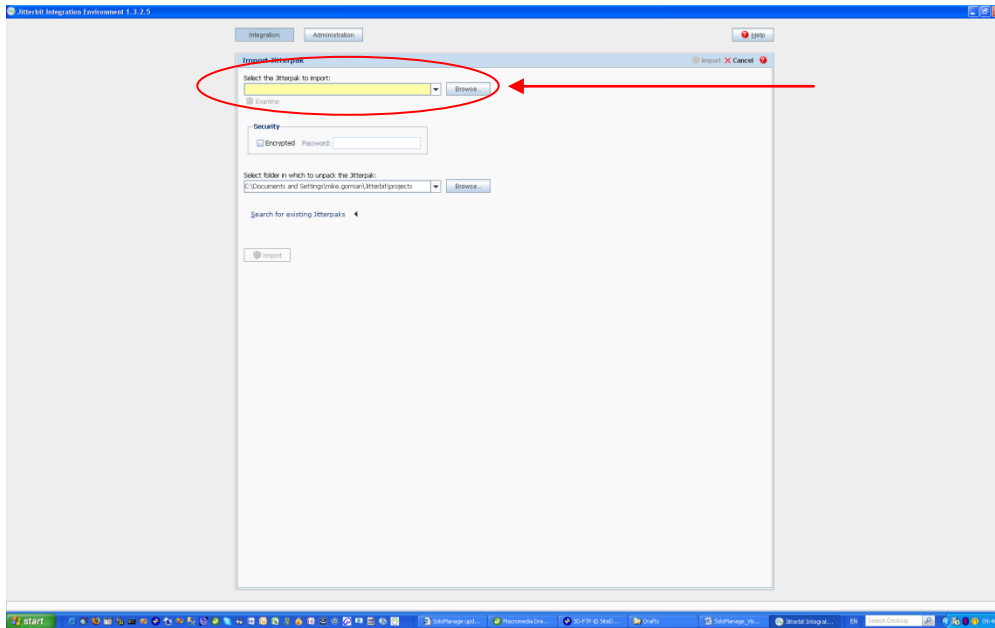
Installation steps

To install and configure SugarCRM to SoloManage integration, follow these steps:

1. Install the latest version of SoloManage
2. Install the Jitterbit Server on the server which contains the SoloManage SQL Server. When installing SoloManage, a prerequisite check is that SQLExpress is present. However, that does not necessarily mean that the SoloManage database has to be installed on SQLExpress: it may be installed on a full version of SQL Server, by selecting an alternative SQL instance from the SQL dropdown list during the SoloManage installation dialogue.
3. Install the Jitterbit Integration environment on whichever computer you prefer: it need not be the same computer as the Jitterbit server.
4. After configuring and testing your Jitterbit installation, open the Jitterbit Integration Environment, and click the “Import JitterPak” link, as illustrated here:

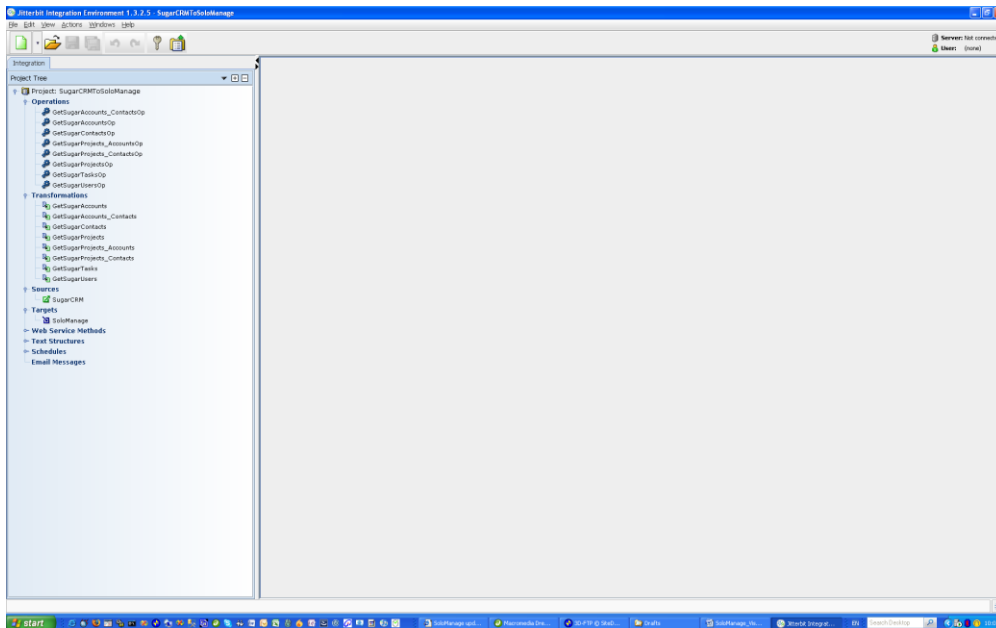


5. Browse to the SoloManage JitterPak you file you downloaded from <http://www.solomanage.com>, by clicking the Browse button on the next page:



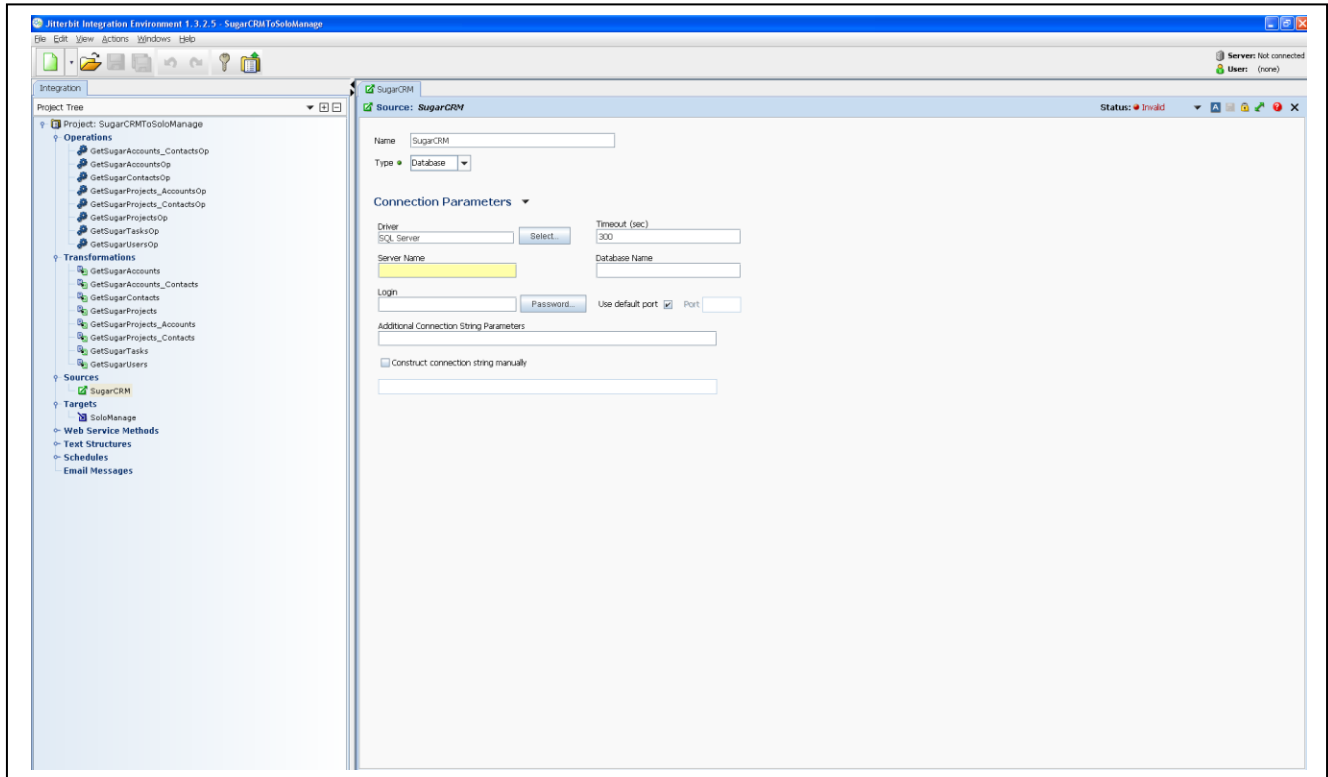
Then, click the “Import” button, and follow the prompts.

6. When the SoloManage JitterPak is open in the JitterBit Integration Environment, you will see a page which looks like this:





From the left pane, right click the node named “SugarCRM”, then choose “Open”. The next step allows you to configure the connection to your SugarCRM installation. Complete the server name, database name, login and password you use to connect your SugarCRM database. These details may not necessarily be the same details you use to login to SugarCRM as a user: the details needed are those required to login to the database itself. In many cases, the SQL login ‘sa’ will have the necessary connection credentials



To check your connection, click the double headed green arrow near the top right corner of the page.

If you need to alter the connection for the SoloManage database from the default of “localhost\SQLExpress”, open the SoloManage node and edit the connection string.

The SoloManage Jitterpak is configured to import data from SugarCRM into SoloManage every five minutes. If you would like to alter that schedule, right click the Schedule node in the left pane and alter the details.

When you have completed your configuration of connections and schedules, right click the project node at the top of the tree in the left pane, and select ‘Deploy’. Follow any remaining confirmation prompts. Then right click the ‘Operations’ node, and select ‘Run all operations’. Follow any prompts, and then close the Jitterbit Integration Environment.

7. Logon to your installation of SoloManage. Navigate to Settings from the left navigation pane, then choose the tab named 'System settings', to display this detail:

The screenshot shows the 'System settings' page in SoloManage. The 'System settings' tab is active. The 'SugarCRM integration' checkbox is circled in red, and a red arrow points to it from the right. Other settings include: 'Check for updates when starting' (checked), 'Check for updates every' (7 days), 'Truncate log when larger than' (1 MB), 'Grid page size' (20 items), 'Use a proxy server' (unchecked), 'Proxy server', 'Proxy port', 'Proxy username', 'Proxy password' (masked with asterisks), 'Mail server' (localhost), 'Mail server port' (25), 'Mail server username', 'Mail server password' (masked with asterisks), and 'SugarCRM integration' (unchecked). An 'Update' button is located at the bottom.

Check the SugarCRM integration box, then click 'Update'

Logoff from SoloManage, then logon again.

8. From the SoloManage left navigation menu, choose 'Users', and then for each user in your SoloManage installation you wish to map to a SugarCRM users, click the checkbox marked "Mapped in SugarCRM", then select the SugarCRM user name you would like this SoloManage user to correspond to. Then, click the 'Update' button.
9. Logoff again from SoloManage, and logon again. The installation of the integration is now complete and ready to use.

Please ensure you are familiar with the limitations of the integration between SugarCRM and SoloManage, outlined in the following section.



Limitations of the integration

There are a number of limitations to the integration between SugarCRM and SoloManage. These include:

1. SugarCRM was not designed for real-time instant integration of data, and the scheduling of the JitterBit operations is also not instantaneous. Therefore, changes made to accounts, projects or tasks in SugarCRM may not appear in SoloManage for several minutes, depending on the frequency of the scheduling you have set.
2. The “master” source of data in the integration relationship is SugarCRM. Accounts, contacts, projects and tasks created or updated in SugarCRM are passed to SoloManage, but changes made in SoloManage are not passed in the opposite direction. SoloManage should be viewed in this context as an extension of SugarCRM, providing additional functionality for timesheets and billing. If you make changes to project titles, task descriptions or similar items in SoloManage which have been imported from SugarCRM, your changes will be overwritten with data from SugarCRM when a scheduled JitterBit update takes place. However, any clients, projects or tasks which have been added directly, and only, in SoloManage are retained in SoloManage, and are not overwritten whenever data is imported from SugarCRM.
3. To be visible as a normal client project in SoloManage, a project should be created in SugarCRM for a Contact which is associated with an Account. Projects created for Contacts not associated with an account will appear as internal projects or tasks in SoloManage, which is consistent with the existing SoloManage approach. SugarCRM projects created for Accounts without any Contacts will appear as projects without a client in SoloManage.
4. The client contact allocated to a project in SoloManage will be the first name entered in the list of contacts for the relevant account in SugarCRM.
5. Priorities for imported tasks are all set to level ‘3’, on a scale of 1 to 5.
6. The default rate for imported tasks is set to the standard system default of £1 per hour. This is unlikely to be the actual billing rate you would use, and you should set the appropriate rate for each task.
7. SoloManage processing of scheduled imported data takes place only during the login for a user session or in the background when a user navigates to the SoloManage Summary page. So, to ensure that the most recent data is visible, navigate to the Summary, and consider the Summary icon as a ‘Refresh’ button.