



From Technologies to Solutions

SugarCRM Developer's Manual

Customize and extend SugarCRM

Learn the application and database architecture of this open-source CRM and develop and integrate your own modules and custom workflows

Dr. Mark Alexander Bain

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Credits

Author

Dr. Mark Alexander Bain

Editorial Manager

Dipali Chittar e207e1f6d17cc5a62b77c0097ebf0a7c
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Reviewers

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Shantanu Zagade

About the Author

Dr. Mark Alexander Bain first started customizing CRM systems back in the mid '90s when he was team leader for Vodafone's Cascade project—the team took the 'out-of-the-box' Clarify CRM and turned it into a radio base station planning application, complete with a workflow engine for passing jobs between the different departments involved in the planning, building, and implementation of a radio network.

Since then he's lectured at the University of Central Lancashire, and currently Mark writes articles on all things Linux and Open Source for *Linux Format*, *Newsforge.com*, and *Linux Journal*. He works from his home on the edge of the Lake District in the UK, where he lives with his wife, two dogs and two cats, and gets the odd visit from his sons—Michael and Simon.

SugarCRM customization, therefore, seems the obvious choice for this, his second book, since it combines Mark's knowledge of working with commercial CRM's and the Open Source philosophy.

For Mum, Donna, and Ellie.

And thanks (as always) to Simon, to Michael, and to all of the Packt Publishing team.

About the Reviewers

Andrew J. R. Whitehead

Andrew Whitehead is the lead developer at The Long Reach Corporation and has been working with the SugarCRM framework, in the form of the company's Info At Hand product, for the past three years. He has been implementing web applications both recreationally and professionally for the past fifteen years. Andrew is passionate about designing general solutions to common problems and enjoys working with new languages and technologies. He lives in Toronto, Canada and studies Linguistics part-time at the University of Toronto.

I would like to thank my family and friends, particularly Aziza, for their patience during the editing process.

Michael J. R. Whitehead

Michael Whitehead is a leading authority on the design and implementation of Customer Relationship Management (CRM) systems. Michael's experience and expertise spans a thirty year career in software architecture, design, and development as well as business management and ownership of multiple technology organizations. Among many other accomplishments Michael is the author of *Implementing SugarCRM* (from Packt Publishing) and a contributing author of the *Sugar Open Source User Guide*.

Michael is currently the founder and President of The Long Reach Corporation (www.infoathand.com). At The Long Reach Corp. the focus is Info At Hand™— a Customer Relationship & Business Management (CRBM) system for Small & Mid-Size Businesses, built on a base of SugarCRM Open Source. It blends a best-of-breed CRM with extended business management features for Order Management, Project & Resource tracking, Customer Service, and HR.

Ajay Gupta

Ajay Gupta has over ten years of experience in the CRM industry. He has participated in design and development of several CRM applications that have been deployed globally.

Susie Williams

Susie Williams is the Sr. Manager of Community Development at SugarCRM. Her responsibilities include development of the Sugar Adoption Program as well as management of the Forums and Sugar Forge. Prior to joining SugarCRM, Susie managed the Worldwide Sales Engineering group at WebEx Communications; she has also been involved in the CRM industry through various positions (from Engineering to Implementation Consulting) at Aurum Software/Baan Company. Susie holds a B.A. in Electrical Engineering/Computer Science from U.C. San Diego.

Aspen Olmsted

Aspen Olmsted is founder and president of Alliance Software Corporation, a CRM software solutions provider to the entertainment and non profit verticals. Aspen holds an MBA from the University of South Carolina along with certifications in PHP, MySQL, MCSD, MCSE, and many ERP applications.

Emilio Taylor

For the past one and half years, Emilio has been developing as a Project Manager for SugarCRM Development. Specializing in Microsoft SQL Server 2005 implementations, Emilio has integrated Stored Procedures, Database Triggers, Customized Modules, and Java scripting into the development lifecycle of SugarCRM deployment. Plus, in June of 2005, Emilio founded EmillionDreamz.org, a web design company utilizing Joomla! CMS for customized website development and deployment. Emilio has been living Central Florida for the past thirteen years.

Ryuhei Uchida

Ryuhei Uchida is Chief Technology Officer and a partner consultant of CareBrains, an open source consulting company and a reseller partner of SugarCRM Inc. He has broad experience of business strategies, international operations, and innovation management in the IT industry.

Prior to joining CareBrains, he had held positions in business development, product management, consulting, and sales & marketing at Fujitsu, Fujitsu Business Systems of America, J.D. Edwards, and Vitria Technology.

He is one of the enthusiastic evangelists of open-source business applications in Japan, and is leading state-of-the-art open-source communities to bring innovation into the second largest IT industry in the world.

He earned his B.A. in agriculture from Tokyo University in Japan, and also an MBA in Technology Management from Waseda University Business School.

