



Connecting People to SugarCRM

20th January 2017

SugarCRM enables businesses to create extraordinary customer relationships with the most innovative, flexible and affordable CRM solution in the market. SugarCRM connector allows to visualize data from your SugarCRM and create reports about your organisation's Leads, Opportunities and Campaigns.

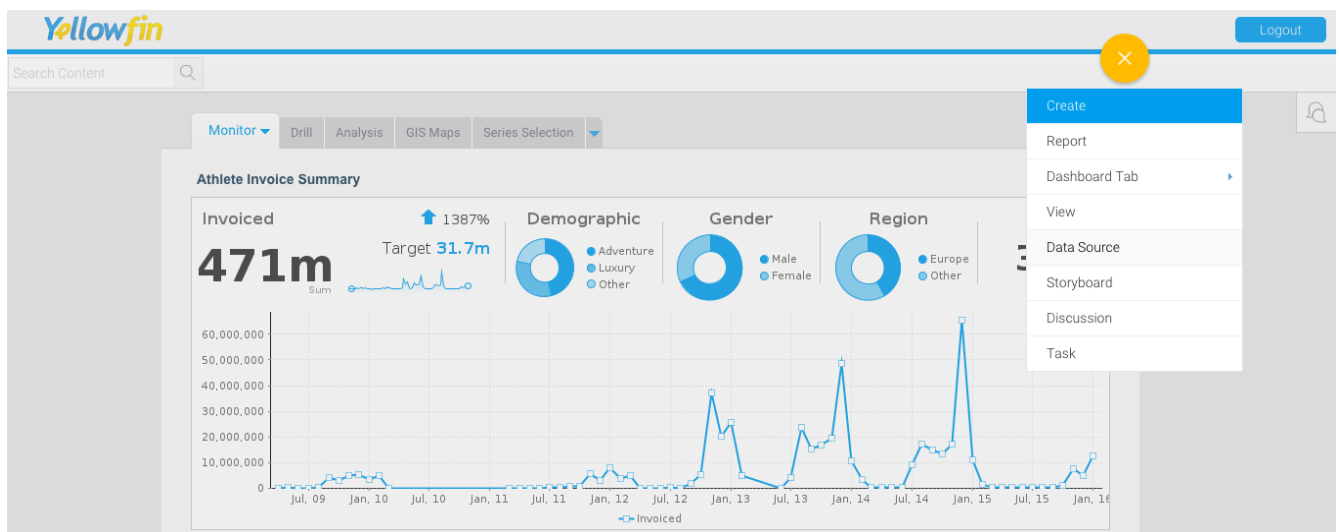
Yellowfin makes connecting to SugarCRM and sharing insights easy:

1. [Install your connector](#)
2. [Connect to your account](#)

Install your Connector

Add a New Data Source

- a) Log into your Yellowfin Server
(The User must have permissions to add a new Data Source)
- b) Click **Create** and select **Data Source**

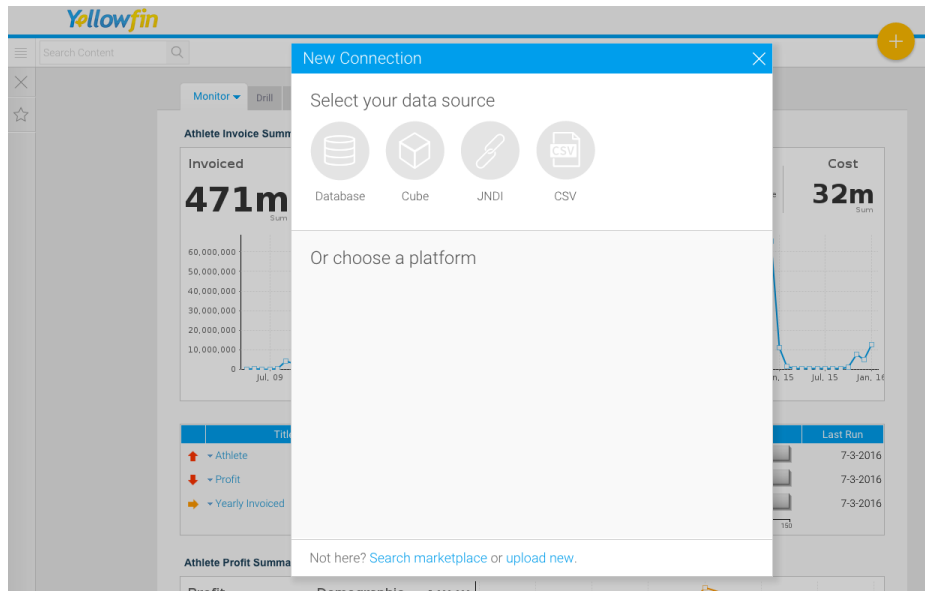


Upload new connector

If you can see the icon for the SugarCRM Connector at the **New Connection** step, then you can skip to [Connect to your account](#). Otherwise you will need to select the **Not here?** links.

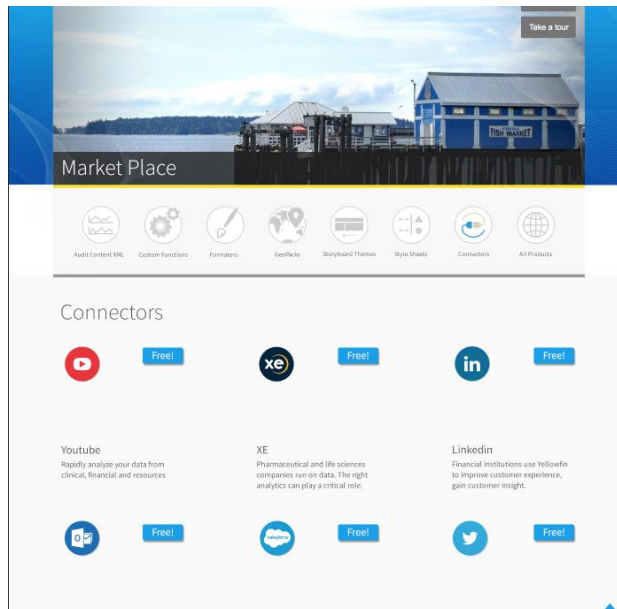
Search Marketplace - download your connector from the Yellowfin Marketplace

Upload New - upload your connector to your instance of Yellowfin



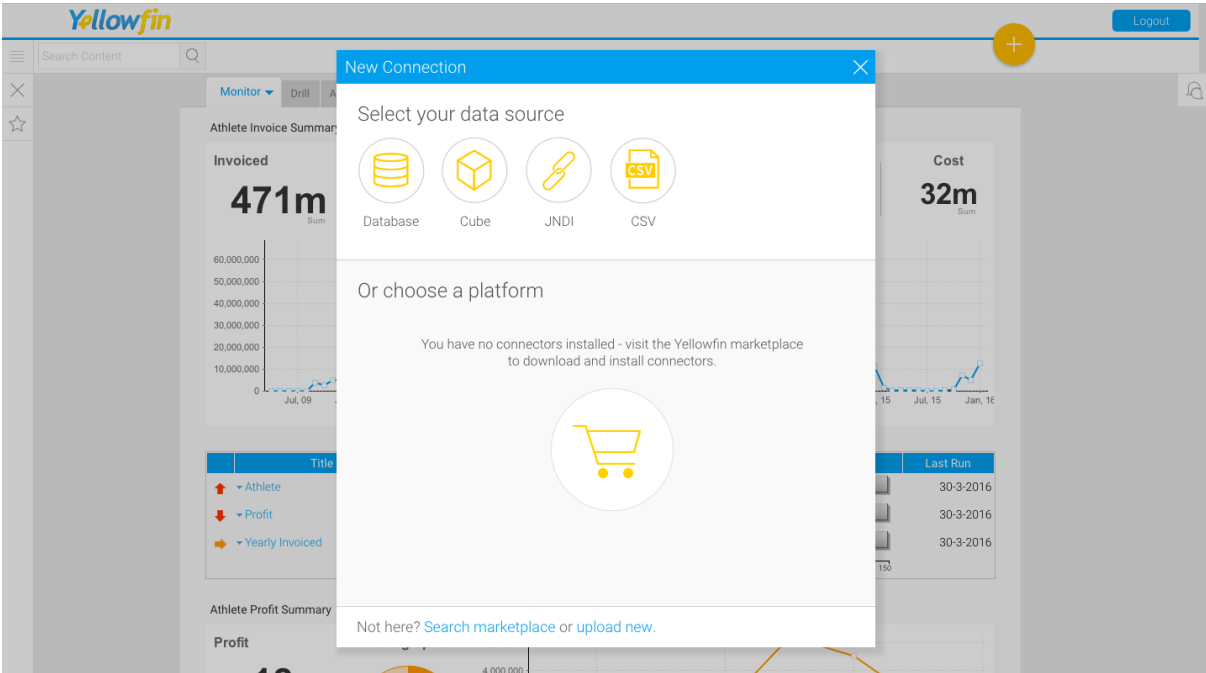
Download the connector from the Yellowfin Marketplace

- c) Go to the [Yellowfin Marketplace](#)
- d) Download the **SugarCRM Connector** (it's free!)



Upload your new Connector

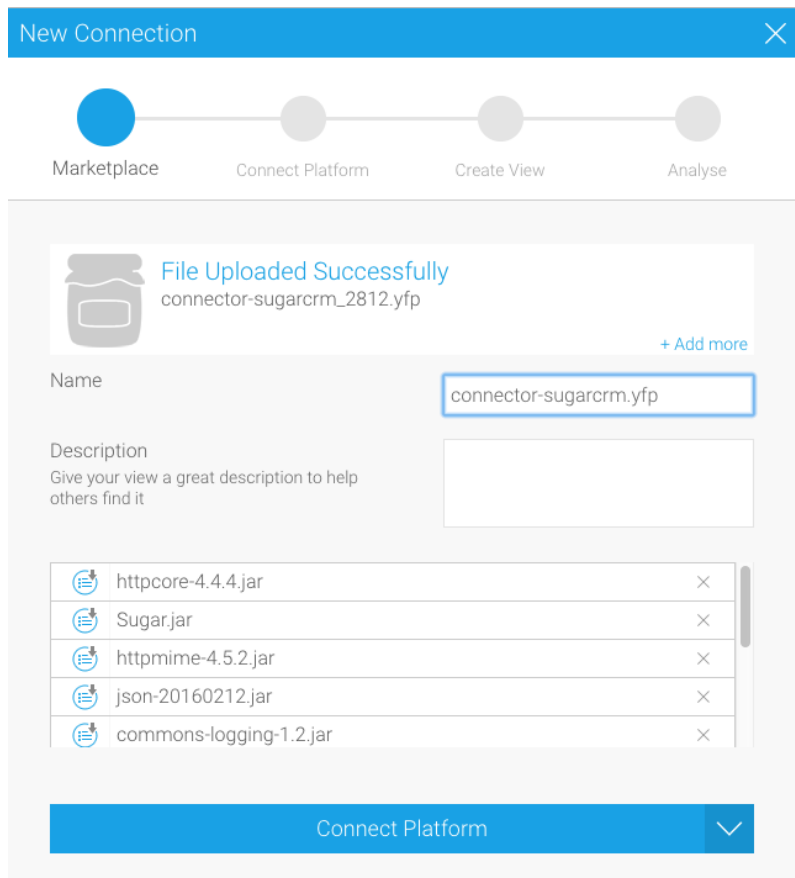
a) Click **Upload New**.



b) Give your connector a **name** and **description**.

c) Click **Connect Platform**.

Your connector will now be available under your **Data Source's** list.



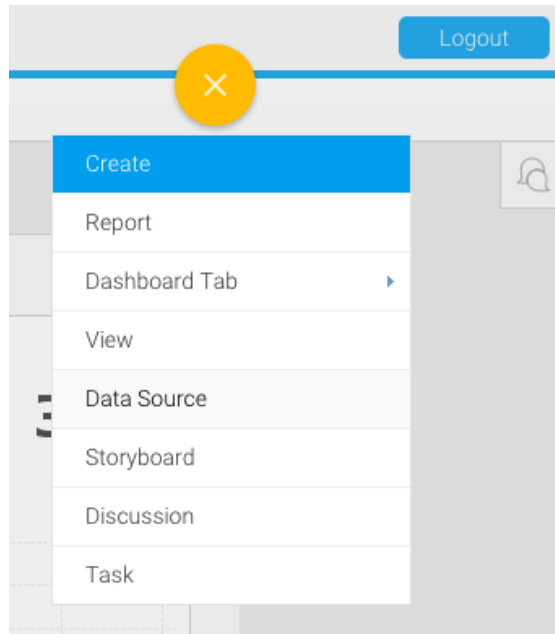
Connect to your account

Once your SugarCRM Connector is installed, you can use it to connect to your SugarCRM account.

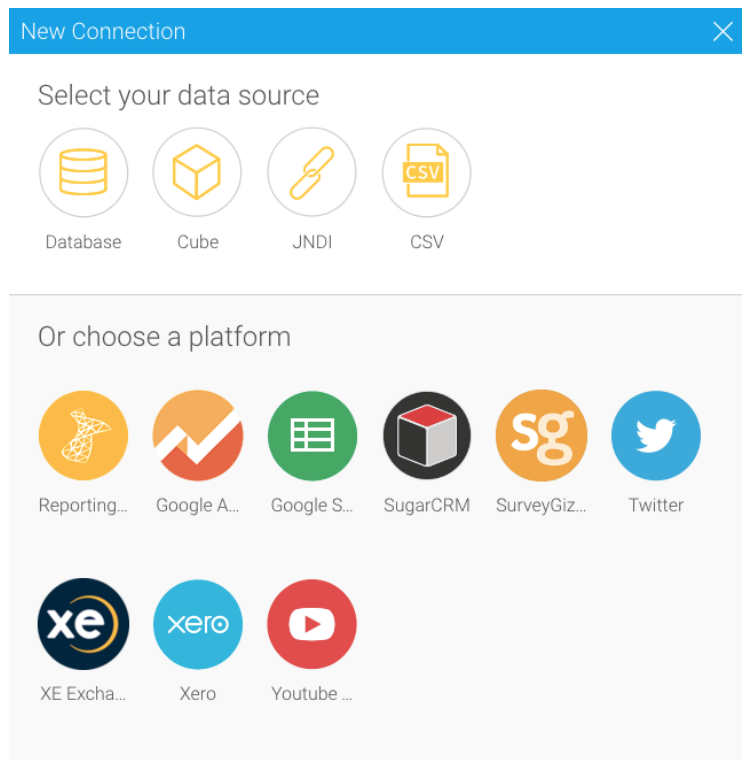
Create a new Data Source

- a) Click **Create** and select **Data Source**.

(If you have just installed your connector, then you will be immediately taken to the next step)



- b) Select **SugarCRM**



Not here? [Search marketplace](#) or [upload new](#).

Name your Connection and Enter your Account Details

- c) Give your connector a **name** and **description**.
- d) Enter Username, Password, Maximum Records and URL.
- e) Click **Launch Pre-Built Content**

New Connection

Connection Setti... Create View Analyse

Name: SugarCRM

Description:

Connection Details:

1. Enter your SugarCRM userid.
2. Enter Password.

1. Username: admin

2. Password:

4. Maximum Records: 1000

5. URL: http://yellowfinbi.southeastasia.clc

Launch Pre-Built Content

About Yellowfin

Yellowfin is a global Business Intelligence (BI) and analytics software vendor passionate about making BI easy. Founded in 2003 in response to the complexity and costs associated with implementing and using traditional BI tools, Yellowfin is a highly intuitive 100 percent Web-based reporting and analytics solution. Yellowfin is a leader in mobile, collaborative and embedded BI, as well as Location Intelligence and data visualization.

Over 10,000 organizations, and more than 2 million end-users across 70 different countries, use Yellowfin every day. For more information, visit www.yellowfinbi.com

Additional Resources

[Yellowfin Website](#)

[Yellowfin Marketplace](#)

[Yellowfin Wiki](#)

[Support Forum](#)

[YouTube Channel](#)