

Podcast Script: Excel Plugin

Welcome to this sixty second Sugar snippet. My name is Lori and I am the manager of the Support group. Today I'm going to talk to you about the Excel Plugin, available as Beta for our Enterprise, Pro, and Sugar Network customers.

I believe that the Excel Plugin will help drive user adoption throughout any organization. The last thing that a sales person wants to do is spend their precious time updating their opportunities one record at a time. With the Excel Plugin, a sales representative can quickly pull into a spreadsheet all the opportunities that they need to focus on for that day. As they make their calls, they can update the spreadsheet with the new information. At the end of the day when all their calls have been made, all they need to do is highlight the cells in the spreadsheet that need updating and with one click of a button (well, maybe two) all the opportunities that they touched will be updated. No more needing to edit an opportunity one at a time. This is huge and I expect will help your sales force to be more productive with their time.

However, Sales is not the only organization that will benefit from the plugin. Let's say you've been tasked to import some data into Sugar and after importing the data, you realize that you've forgotten to import a specific field. With the plugin, all you need to do is use the Query Wizard to retrieve those records, enter in the forgotten data in the spreadsheet, highlight the cells requiring to be updated and then update. Once Excel is finished processing the update command, all the imported records will contain the missing data. This is going to save you hours of work!

One feature of the Excel Plugin that I like isn't necessarily glamorous but is very helpful. Let's say you're updating hundreds of records. This could take a few minutes to complete. Whenever Excel is processing data to Sugar, you will see on the bottom left of the window in the Excel status bar which records are currently being processed. This lets you know where Excel is at any given time so you can have peace of mind knowing that the data is being processed and will be completed shortly.

The Excel plugin performs basic CRUD commands (create, read, update and delete). The Excel Plugin makes modifying data very easy. It also makes deleting data very easy, so you want to be sure that users know how the plugin works before they begin using it on their computer.

The Excel Plugin will adhere to the security settings that are set for the user. For example, the user will only be able to query records that they own or are a member of.

You can also use the Excel Plugin to retrieve the data for existing reports. Once you pull the data from a report within Sugar, you can slice and dice the data in Excel any way you need.

Again, I'm very excited that we now have the Excel Plugin out in beta. I'm sure you'll find it to be a very valuable tool.

And that's your 60 second Sugar snippet. Goodbye!