Sugar Podcast; Accounts vs. Opportunities

Hi everybody, this is Susie with another 60 second Sugar snippet, appearing with Kim Miller of our Sugar University team (**Kim**: Hi everybody!). Today we're going to talk about Accounts and Opportunities and touch on the selling processes surrounding these Sugar objects.

Kim: That's right Susie. We get quite a few questions in our Sugar University learning sessions about Accounts and Opportunities, and when Accounts should and should not be used.

Susie: Right, we see a lot of this in the forums as well. So what better time than now to address some of these issues?

Kim: OK, let's get started.

Susie: Let's start with the definitions. How do you describe an Account?

Kim: In Sugar University sessions we define an account as an organization or entity that you have done, are doing, or will do business with. You can call it a customer, a partner, or even good ol' "Account" -- whatever you'd like. Its relationship is long-lasting and its field values like business address, web address, and business name rarely change.

Susie: Good. And an opportunity?

Kim: An opportunity is a potential sales deal or, put another way, a revenue generating event.

Susie: I've seen some people on the forums refer to an opportunity as a "sales project".

Kim: Yeah, I can see that. It's got a starting date and expected end date, and it has phases. But in the end an opportunity is where you track your potential sales deal for a specific account in Sugar as it goes through the sales cycle.

Susie: Ah, and there's the rub. In order to create an opportunity in Sugar you must associate an account with that opportunity.

Kim: Yes, that's right.

Susie: But let's say I do business with "people", not entities. So, my business does not require me to create an Account record, just a Contact record. The Contact represents the person I'm doing business with, and that's all I need. Yet the Opportunity needs an Account.

Kim: Yes. I get that question as well. The Sugar product management team has this as a feature request; that is, to allow an Opportunity to be created without requiring an

Account record, as is already true with a Contact. But in the interim I suggest that Sugar users who deal with people and not entities simply create an Account record with a name that is a combination of the Contact's first and last name.

Susie: This sounds like a business hook just waiting to happen. Any takers out there among you Sugar developers?

Kim: A business hook?

Susie: Yes. Business hooks are a facility that allows for processing to occur at critical points, like at Save time. In this case the hook would create the account record automatically when the Contact is saved. The best part is that the business hook code is upgrade safe. A sample business hook can be found on Sugar Forge. Just search for the words "business hook".

Kim: Cool. Another thing to point out is that it's possible to use Leads as well to track the person to whom you're selling. You can't do as many things with Leads as you can with Opportunities – for instance you can't create a Quote for a Lead – but it just may be that a Lead is enough to conduct your business.

Susie: Yes, and converting a lead can save a step, too, as you're able to create a Contact and a shell of an account record.

Kim: That's right. You're also able to later create an Opportunity using the same conversion process if the need arises and Sugar will prompt you to relate the contact and account you had already created to the new opportunity.

Susie: Oh, that's right. I forgot about that. Cool trick!

Kim: Well, as with anything in Sugar, it's the flexibility of the system that allows for these options.

Susie: Yes, and I'll work on the Sugar developer community to create that business hook in order to make things even simpler.

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