White Paper

Best Practices for CRM Upgrades

Abstract

Customers undertaking CRM upgrade assignments are often hit with new problems. Limited documentation on customization done till date, lack of repository detailing application source code changes, redundant data and slow application are some of them. This whitepaper details out how you can avoid getting obsolete at the same time also ensuring no vendor-lock-in.

The paper describes a tool for comparing the customization of difference instances and versions of SugarCRM based on custom parsing and database comparison methodology.

The paper also summarizes the synergy between identifying the customization and comparisons with standard SugarCRM instance.
Overview

In order for an organization to have a cost-effective solution for upgrading the instance from one version to another, they need a cost-effective and rapidly delivered solution to keep obsolescence of a version at bay.

Upgrade of well-customized instances to new instances is really a complex process and needs well-defined documentation and good knowledge of core files to understand the level of customization.

Upgrade tool is a step to enable users and developers to understand the level of customization done in an instance and to understand timelines to move it in new instances effectively.

What is Upgrade Tool?

It’s an instance and database comparison and upgrade tool for SugarCRM. It will compare the customization of various versions of SugarCRM which will help enterprises to migrate from one version of SugarCRM to another without much effort.

Business Problem Domain: Case Based Approach

Customer wants to upgrade customized running SugarCRM 5.X version to SugarCRM 6.X.

Business objective for upgrading the instance is:

- Core Business functionality should remain intact after the upgrade.
- Minimize the business down time while upgrade.
- Quality Operational data to be moved to new instance without losing the potential Customer’s information.

Technical challenges for resolving the Upgrade Problem

- The SugarCRM vendor might not have followed the best coding guidelines while customizing the instance.
- The upgrade safe development approach is not followed which would consume substantial manual effort of scanning the whole customized coding elements.
Upgrade Tool: Boon to SugarCRM upgradation and key answers to Business problem

- **Minimize development efforts substantially**: It has been found that using this tool the effective development efforts reduced to 60%.
- **Automatic Database Schema Analysis**: Tool automatically analyzes the database of customized instance and gives detailed information about the schemas.
- **Shortening downtime of application**: By shortening the downtime reduces the implementation time and helps the stakeholders to avail the whole functionality in
- **Automatic built-up source code change repository**: It generates detailed source code repository file for better readability and analysis of code.

Upgrade Tool value Proposition

Customization Comparison value proposition is reduction of total cost in upgrading and analyzing the customization.

Process of Comparison
Interface to Interact

The upgrade tool compares customized SugarCRM instances with the standard SugarCRM instances and does Database Comparison and Instance Comparison.

Database Comparison details out the customization done at the database levels so that database structure can be synchronized and compared.
Instance Comparison details out the customization and changes done in the SugarCRM files.

Instance Comparison analysis report generated from the upgrade tool in an excel format shows the all the changes and customization done in structured SugarCRM code.
Upgrade Tool Solution Benefit

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<td><strong>Agility</strong></td>
<td>Very agile to implement and compare the instances</td>
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<td><strong>Reduce Cost of Analysis</strong></td>
<td>Most of the time migration of customized instance to New upgraded instance is a painful activity and takes lots of time to understand the customization. Tool facilitates to reduce the analysis time and additionally reduce the cost.</td>
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<td><strong>Easy to User</strong></td>
<td>User interface is very intuitive. A Business user without much technical expertise can generate and see the analysis reports.</td>
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Conclusion

Cost –effectiveness, agility and convenience are just three reasons any enterprise to opt for robust way of upgrading from one SugarCRM version to another affectively. Upgrade tool allows user to ease-user, compare, evaluate and analyze the result affectively.