Sugar Professional Application Guide

Version 6.2.1

Sugar Professional Application Guide
Version 6.2.1, 2011

www.sugarcrm.com

This document is subject to change without notice.

License

The contents of this document are subject to the Sugar Professional Subscription Agreement ("Agreement"). You may not use this document except in compliance with the Agreement.

Disclaimer

Your Warranty, Limitations of liability and Indemnity are expressly stated in the Agreement. Please refer to the Agreement for the specific language governing these rights and limitations under the Agreement.

Trademarks

All SugarCRM logos in this document are registered trademarks of SugarCRM Inc. See the SugarCRM trademark policies at http://www.sugarcrm.com/crm/open-source/trademark-information.html for more information on how SugarCRM trademarks can be used.

Preface

Welcome to Sugar, a commercial open source Customer Relationship Management (CRM) application.

Sugar enables organizations to organize, populate, and maintain information efficiently on all aspects of their customer relationships. It provides integrated management of corporate information on customer accounts and contacts, sales leads and opportunities, plus activities such as calls, meetings, and assigned tasks. The system seamlessly blends all the functions required to manage information on many aspects of your business into an intuitive and user-friendly graphical interface.

The system also offers a graphical dashboard to track the sales pipeline, the most successful lead sources, and the month-by-month outcomes for opportunities in the pipeline.

Sugar is based on an open source project, and therefore, advances quickly through the development and contribution of new features by its supporting community.

Sugar Professional is a commercially licensed and supported version of the Sugar software that includes many features not released in the Sugar Community Edition.

Welcome to the community!

About this Guide

The *Sugar Professional Application Guide* introduces you to some basic CRM concepts and helps you get familiar with the Sugar system. It describes how to install and upgrade Sugar and access it through a personal computer and a web browser. It also describes how to perform a broad range of customer relationship management tasks and related administration tasks.

Readers are not required to have any programming or software development knowledge, but should be generally familiar with the use of a personal computer and a web browser such as Mozilla Firefox.

Audience

This guide is designed for users and administrators who are new to Sugar, or to CRM and web-based applications.

Overview

Sugar consists of modules, each of which represents a specific functional aspect of CRM such as Accounts, Activities, Leads, and Opportunities. For example, the Accounts module enables you to create and manage customer accounts, and the Activities module enables you to create and manage activities related to accounts, opportunities, etc. These modules are designed to help you manage customer accounts through each step of their life cycle, starting with generating and qualifying leads to customer support and resolving reported bugs. Many of these steps are interrelated and as a result, each module displays related information. For example, when you view the details of a particular account, the system also displays the related contacts, activities, opportunities, and bugs. You can view, edit, and create this information.

As an administrator, you have the power to implement access control for these modules. You can customize the look and feel of Sugar across your organization. You can even create new modules if needed.

Core Features

Sales Force Automation

- Lead, Contact, and Opportunity management to pursue new business, share sales information, track deal progress, and record deal-related interactions
- Account management capabilities to provide a single view of customers across products, geographies, and status
- Automated Quote and Contract management functionality to generate accurate quotes with support for multiple line items, currencies, and tax codes
- Sales forecasting and pipeline analysis to give sales representatives and managers the ability to generate accurate forecasts based on sales data in Sugar
- Sugar Dashboards to provide real-time information about leads, opportunities, and accounts
- Sugar Plug-ins for Microsoft Office to integrate your CRM data with Microsoft's leading productivity tools
- Sugar Mobile for iPhone, a native Sugar application for iPhone, to access contacts, opportunities, accounts, and appointments in Sugar Ultimate, Sugar Enterprise, Sugar Corporate, and Sugar Professional while logging calls and updating customer accounts
- Sugar Mobile for Android, a native Sugar application for Android devices, to access contacts, opportunities, accounts, and appointments in Sugar Ultimate, Sugar Enterprise, Sugar Corporate, and Sugar Professional while logging calls and updating customer accounts

- Sugar Mobile to access mobile functionality through any standards-based web browser

Marketing Automation

- Lead management for tracking and cultivating new leads
- Email marketing for touching prospects and customers with relevant offers
- Campaign management for tracking campaigns across multiple channels
- Campaign Wizard to walk users through the process of gathering information such as the marketing channel, targets, and budget needed to execute a campaign effectively
- Campaign reporting to analyze the effectiveness of marketing activities
- Web-to-Lead forms to directly import campaign responses into Sugar and capture leads

Customer Support

- Case management to centralize the service history of your customers and monitor how cases are handled
- Bug tracking to identify, prioritize, and resolve customer issues
- Customer self-service portal to enable organizations to provide self-service capabilities to customers and prospects for key marketing, sales, and support activities
- Knowledge Base to help organizations manage and share structured and unstructured information

Collaboration

- Shared Email and calendar with integration to Microsoft Outlook
- Activity management for emails, tasks, calls, and meetings
- Content syndication to consolidate third-party information sources
- Sugar mobile functionality for wireless and PDA access for employees to work when they are away from the office

Reporting

- Reporting across all Sugar modules
- Real-time updates based on existing reports
- Customizable dashboards to show only the most important information

Administration

- Edit user settings, views, and layouts quickly in a single location
- Define how information flows through Sugar (workflow management) and the actions users can take with information (access control)
- Customize the application in Studio to meets the exact needs of your organization
- Create custom modules in Module Builder

Related Documentation

For information on new features and other changes in this release, refer to the appropriate Release Notes for the Sugar edition that you use.

Refer to the following guides for information on related Sugar products:

- *Sugar Plug-in for Microsoft Word*: Describes how to install and use the Sugar Plug-in for Microsoft Word
- *Sugar Plug-in for Microsoft Excel*: Describes how to install and use the Sugar Plug-in for Microsoft Excel
- *Sugar Plug-in for Microsoft Outlook*: Describes how to install and use the Sugar Plug-in for Microsoft Outlook

Installing and upgrading Sugar

This chapter describes how to install and upgrade Sugar Professional. This information is intended for administrators. After installation, you can create users and perform other administrative tasks in Sugar.

Topics are as follows:

- **Installation prerequisites and guidelines**
- **Downloading and installing Sugar**
- **Upgrading Sugar**
- **Converting Sugar Editions**
- **Using the Sugar Silent Upgrader**
- **Uninstalling a Sugar instance**

Before installing Sugar 6.2.0, ensure that you have the appropriate components installed on your server.

Installation prerequisites and guidelines

This section lists the memory, database, and software requirements for installation.

Note: Install the MB String module on your web server to support multi-byte characters.

Memory requirements

Increase the value of the `memory_limit` parameter in the *php.ini* file as follows:

- MySQL Server: 96M or higher
- MS SQL Server: 96M or higher

Database requirements

- If you are using MySQL, install version 5.0 or 5.1 to use with Sugar 6.2.0.
- If you are using Microsoft SQL Server, you need to download the SQL Server Driver for PHP version 2.0 from Microsoft and extract the contents to the /ext directory of the PHP installation.

Select from the following DLLs as appropriate for the PHP version you are using.

Driver File	PHP Version	Thread Safe	Use with PHP .dll
php_sqlsrv_53_nts_vc6.dll	5.3	No	php5.dll
php_sqlsrv_53_nts_vc9.dll	5.3	No	php5.dll
php_sqlsrv_53_ts_vc6.dll	5.3	Yes	php5ts.dll
php_sqlsrv_53_ts_vc9.dll	5.3	Yes	php5ts.dll
php_sqlsrv_52_nts_vc6.dll	5.2	No	php5.dll
php_sqlsrv_52_ts_vc6.dll	5.2	Yes	php5ts.dll

Add the following line in **php.ini** to enable it:

`extension=<`***`dll_name`***`>;`

where ***`dll_name`*** is a driver file listed in the table above.

The driver also requires you to install the Microsoft SQL Server Native Client on the web server. Install the version for SQL Server 2008 even if you are installing on SQL Server 2005.

Securing your Sugar installation

To ensure that your Sugar installation is secure from unauthorized access, for Apache, it is recommended that you configure the system as described below.

Before you install Sugar, set `AllowOverride` to `All` for the Sugar installation directory in the **httpd.conf** file. After you install Sugar, a **.htaccess** file is created in your Sugar installation directory. This file contains the following content:

```
# BEGIN SUGARCRM RESTRICTIONS
RedirectMatch 403 (?i)^.*\.log$
RedirectMatch 403 (?i)/+not_imported_.*\.txt
RedirectMatch 403 (?i)/
+(soap|cache|xtemplate|data|examples|include|log4php|metadat
a|modules)/+.*\.(php|tpl)
RedirectMatch 403 (?i)/+emailmandelivery\.php
RedirectMatch 403 (?i)/+cache/+upload
# END SUGARCRM RESTRICTIONS
```

To test the validity of these restrictions, access the **sugarcrm.log** through the browser to ensure that `error #403` is displayed. If not, check your Apache configuration to ensure that htaccess is enabled. For more information, check the Apache documentation.

Downloading and installing Sugar

If you are installing Sugar on your machine for the first time, follow the instructions in this section. If you have an earlier version of Sugar installed on your machine, refer to Upgrading Sugar for instructions on how to upgrade your Sugar instance.

Follow the steps listed below to install Sugar:

1. Install the platform-appropriate (Linux or Windows) version of PHP, web server, and database on your machine.
2. Download Sugar files.
3. Copy the Sugar files to your web server. Check for dependencies and requirements, and set them.
4. Navigate to the php.ini file located in your Sugar root directory and set the global_variables parameter to EGPCS.
5. Restart the web server.
6. Install Sugar Professionalwith the Sugar Setup Wizard.

Note: Restart the web server before proceeding with the installation if you have modified the php.ini file.

To download the latest Sugar files

1. Go to http://www.sugarcrm.com/
2. Navigate to Support & Training/Support Portal or visit

   http://www.sugarcrm.com/sugarshop/downloads.php.
3. Login using your Sugar username and password.
4. Click **Download Purchased Software**.
5. Populate the **Download Key** field in the **Download Manager** page and click **Submit**.
6. Click the link for the appropriate zip file to download it.

   For example, SugarPro-6.2.0.zip.

To copy Sugar files to the web server

After you download Sugar, you need to unzip the files and set permissions.

1. Locate the webroot directory on your web server. This directory stores publicly accessible files. Common locations for webroot are:

   /var/www/html/ (Linux/Apache)

   C:\Inetpub\wwwroot\ (Windows/IIS)

   C:\Program Files\Apache Group\Apache\htdocs\ (Windows/Apache)

   /Library/Web server/Documents/ (MacOS X/Apache)

2. Unzip the Sugar zip file into your webroot.

   This automatically creates a directory within webroot.

3. Rename this directory.

4. Set permissions on the Sugar files. The following directories, all subdirectories, and files must be writable by your web server user:

   - cache
   - custom
   - modules
   - config.php
   - config_override.php
   - sugarcrm.log

   Note: Typically, there are multiple versions of the log file, such as sugarcrm.log, sugarcrm.log.1, sugarcrm.log.2, and so on.

   For example:

   chgrp ApacheUser.ApacheGroup <SugarInstallRoot> -R recursively sets ownership for root directory to Apache user and group.

   chmod 755 <SugarInstallRoot> -R recursively sets permissions to Read/Write, Execute for the owner, and Read/Execute for everyone else.

   The system user that your web server uses to access files in your webroot varies depending on your operating system configuration. Common web server users include:

   - apache (Linux/Apache)
   - nobody (Linux/Apache)
   - IUSR_computerName (Windows/IIS)

   Consult your system administrator if you are unsure of your web server user.

5. Ensure that file permissions are set for Read/Execute to **includes** directory and **sugar root** directory (in addition to the already existing list of directories/files) before you view Sugar on your browser.

Using the Sugar Setup Wizard

Use the Sugar Setup Wizard after copying the Sugar files into your web root. The Sugar Setup Wizard is located at

http://<yourServer>/<yourSugarDirectory>/install.php.

For example: http://localhost/Sugar-Full_6.2.0/install.php

You can perform a typical installation or a custom installation. Typical installation is recommended, but you can choose custom installation for the following reasons:

- The same Database Admin User should not be used as the Sugar database administrator
- Locale settings should be specified during installation instead of after logging into Sugar

To perform a typical installation of Sugar

1. Launch your browser and enter the URL mentioned above.

   This displays the Welcome page.
2. Click **Next**.

   The Installer displays installation instructions and requirements to help determine successful Sugar installation.
3. Review the information and click **Next**.

   This displays the **Sugar License Agreement**.
4. Review the license, check **I Accept**, and click **Next**.

   The installer checks the system for compatibility and then displays the **Installation Options** page.

   Note: You can modify any of your settings at any time prior to clicking **Install** in the **Confirm Setting** menu. To modify any settings, click the **Back** button on your browser to return to the appropriate page.
5. Select **Typical Install**. Input the license key information in the **Download Key** field.You can also enter it after you have installed the application.
6. Click **Next**.

   This displays the **Database Type** page.
7. Select the database that is installed on your system and click **Next**.

   This displays the **Database Configuration** page.

   a. Enter the database name. The Installer uses **sugarcrm** as the default name for the database. You can specify a new name.

   b. Enter the **Host Name** or the **Host Instance** for My SQL and SQL Server.

The host name is, by default, set to **localhost** if your database server is running on the same machine as your web server.

c. Enter the username and password for the Database Administrator and specify the Sugar Database Username.

d. Ensure that the Database Administrator you specify has the permissions to create and write to the Sugar database.

For My SQL and SQL Server, by default, the Installer selects the Admin User as the Sugar Database User. The Sugar application uses Sugar Database User to communicate with the Sugar database. You can create a different Sugar Database user at this time.

To select an existing user, choose **Provide existing user** from the **Sugar Database Username** drop-down list. To create a new Sugar Database user, choose **Define user**. Enter the database username and password in the relevant fields. Re-enter the password to confirm it. The new user information is displayed in **System Credentials** on the **Confirm Settings** page at the end of the installation process.

e. Accept **No** as the default value if you do not want the Sugar Demo data. Select **Yes** to populate the database with the Sugar Demo data.

8. Click **Next**.

   The Installer validates the credentials of the specified administrator. If a database with that name already exists, it displays a dialog box asking you to either accept the database name or choose a new database. If you use an existing database name, the database tables will be dropped.

9. Click **Accept** to accept the database name or click **Cancel** and enter a new name in the **Database Name** field.

   This displays the **Site Configuration** page.

10. Enter a name for the Sugar administrator.

    The Sugar administrator (default name **admin**) has administrative privileges in Sugar. You can change the default username.

11. Enter a password for the Sugar admin, re-enter it to confirm the password, and click **Next**.

    This displays the **Confirm Settings** page. The **Confirm Settings** page displays a summary of the specified settings. Click **Back** on your browser to navigate to previous pages if you want to change the settings.

12. Click **Print Summary** for a printout of the settings for your records.

    Click **Show Passwords** and then click **Print Summary** to include the database user password and the Sugar admin password in the printout. When you click **Show Passwords**, the system displays the passwords and changes the button name to **Hide Passwords**. You can click this button to hide the passwords again.

13. Click **Install**.

    This displays the **Perform Setup** page with the installation progress.

14. Click **Next** when the setup is complete.

    This displays the **Registration** page. Registration is optional.

15. Enter the necessary information and click **Send Registration** to register your Sugar instance with SugarCRM; or click **No Thanks** to skip registration.

    This displays the Sugar login page. You can now log into Sugar with the Sugar admin name and password that you specified during installation.

To perform a custom installation of Sugar

1. Launch the browser and enter the URL described above.

   This displays the Welcome page.

2. Click **Next**.

   The Installer displays installation instructions and requirements to determine a successful Sugar installation.

3. Review the information and click **Next.**

   This displays the **Sugar License Agreement** page.

4. Review the license, check **I Accept**, and click **Next**.

   This displays the **Installation Options** page.

5. Select **Custom Install** and click **Nex**t.

   This displays the **Database Type** page.

6. Select the database of your choice and click **Next**.

7. Enter the database name.

   The Installer displays **sugarcrm** as default name for the database. You can specify a new name for the database as well.

   a. Enter the **Host Name** or the **Host Instance** for My SQL and SQL Server.

      The host name is set to **localhost** by default if your database server is running on the same machine as your web server.

   b. Enter the username and password for the Database Administrator and specify the Sugar Database Username.

      Ensure that the Database Administrator you specify has the permissions to create and write to the Sugar database.

      For My SQL and SQL Server, by default, the Installer selects the Admin User as the Sugar Database User. The Sugar application uses the Sugar Database User to communicate with the Sugar database. You can also create a different Sugar Database user.

      Select **Provide existing user** from the **Sugar Database Username** drop-down list to select an existing user. Select **Define user** to create a new Sugar Database user. Enter the database username and password in the relevant fields. Re-enter the password to confirm it. This new user information displays in **System Credentials** on the **Confirm Settings** page at the end of the installation process.

   c. Accept **No** as the default value if you do not want the Sugar Demo data. Select **Yes** to populate the database with the Sugar Demo data.

8. Click **Next**.

   The Installer validates the credentials of the specified administrator. If a database with the specified name already exists, it displays a dialog box prompting you to either accept the database name or choose a new database. If you use an existing database name, the database tables will be dropped.
9. Click **Accept** to drop current tables or click **Cancel** and specify a new database name.
10. Click **Next**.

    This displays the **Site Configuration** page.
11. Enter the URL of your Sugar instance.
12. Enter a name for your system to display on the Sugar application's browser title bar.
13. Enter a name for the Sugar administrator. The Sugar administrator (default name **admin**) has administrative privileges in Sugar. You can change the default name.
14. Enter a password for the Sugar administrator, re-enter it to confirm the password, and click **Next**.

    This displays the security options on the **Site Security** page.
15. Select the desired security options and input information in the relevant fields.
16. Click **Next**.

    The Installer displays the **Confirm Settings** with a summary of the specified settings.
17. Click **Show Passwords** and **Print Summary** to include the database user and the Sugar admin passwords in the printout.
18. Click **Install**.

    This displays the **Perform Setup** page with the installation progress.
19. Click **Next** when the setup is complete.

    This displays the **Registration** page. Registration is optional.
20. Enter the necessary information and click **Send Registration** to register your Sugar instance with SugarCRM or click **No Thanks** to skip registration.

    This displays the Sugar login page. You can now log into Sugar with the Admin user name and password specified during installation. You can set up Sugar during the login process, or you can set it up after you have logged in. For more information, see Accessing Sugar and setting your User Preferences.

Upgrading Sugar

This section describes how to upgrade Sugar Ultimate, Sugar Enterprise, Sugar Corporate, Sugar Professional, and Sugar Community Edition using the Upgrade Wizard or the Silent Upgrader.

You can upgrade from Sugar versions 6.0.x and 6.1.x to Sugar 6.2.0.

Download the appropriate upgrade.zip file from the Sugar website to your local machine to upgrade your Sugar application. For example, to upgrade Sugar Professional from 6.0.x to 6.2.0, you will need the **SugarPro-Upgrade-6.0.x-to-6.2.0.zip** file. To upgrade from 6.1.0, you will need the **SugarPro-Upgrade-6.1.x-to-6.2.0.zip** file

For Sugar Ultimate, Sugar Enterprise, Sugar Corporate, and Sugar Professional, download the Upgrade zip file from the Sugar Support Portal at https://www.sugarcrm.com/crm/support into your local machine. For Sugar Community Edition, you can upload the Upgrade zip file to your local machine from the SugarCRM website.

Log into the Sugar application to use the Upgrade Wizard. Run a PHP script from the command line on the server where the Sugar instance is installed to use the Silent Upgrader.

CAUTION: It is strongly recommended that you run the upgrade process on a copy of your production system.

Compatibility matrix for upgrade

PHP version	5.2.1-5.2.6, 5.2.8-5.2.15, 5.2.17, 5.3.0 - 5.3.6
Databases	MySQL - 5.0x, 5.1 MSSQL - 2005, 2008 Oracle - 10g, 11g (Oracle is supported only for Sugar Ultimate and Sugar Enterprise)
Operating systems	Windows: Sugar runs on any OS that runs PHP Linux: Sugar runs on any OS that runs PHP Mac: Sugar runs on any OS that runs PHP

Upgrade prerequisites

- Backup your current Sugar directory and database before beginning the upgrade process.
- Disable op-code caching before upgrading your Sugar installation if op-code caching is enabled in the PHP configuration file. You can enable it after the upgrade process is complete.
- Increase the default value of the parameters listed below before you begin the upgrade process if you are using Zend Core 2.0:
  - Navigate to C:\Program Files\Zend\Core\etc\fastcgi.conf and increase the default value for **ConnectionTimeout** to 3000 seconds and **RequestTimeout** to 6000 seconds.
  - Navigate to the php.ini file and increase the default value of **max_execution_time** to 6000 seconds.
- Perform the following for the large size of the upgrade files:

- Modify and save the value of **Maximum upload size** to 21000000 (20MB) in the **Advanced** section of the **System Settings** page of your current Sugar installation.
- Navigate to the php.ini file on your web server and configure the parameters listed below in the **Advanced section** of the **System Settings** page of your current Sugar installation:
  - Set **post_max_size** to at least 60MB
  - Set **upload_max_filesize** settings to at least 60MB
  - Set **max_input_time** to a large number
  - Set **memory_limit** to 256MB

  Restart the web server and begin the upgrade process.

- Ensure that **LimitRequestBody** is set to a large number or use the default value of 2GB if you are using an Apache web server and **LimitRequestBody** is set in the **httpd.conf** file. Restart Apache and begin the upgrade process.
- Ensure that the **webserver user** has write permissions to the Sugar database. The upgrade to Sugar 6.2 will add and replace files in several locations including the Sugar root directory. The **webserver user** must have write permissions for the root folder and all sub-directories during the upgrade process.
- The process of upgrading can take up to 30 minutes. Set the CGI script timeout to more than the default 300 seconds to ensure that the CGI application does not time out if you are using the IIS web server.
- Save PHP files for customized modules (for example, **accounts.php**) in the Customs directory and not within the main module. Existing customizations may be overridden by changes in Sugar 6.2 during upgrade.

Upgrade considerations

The Dynamic Teams feature requires some database schema changes across all modules as part of the upgrade process. For larger databases, this operation can take some time to complete. Follow the steps listed below to ensure a smooth upgrade process:

1. Test your upgrade on a development instance instead of the production instance.
2. Use the Silent Upgrade method through the command line interface to conduct the upgrade instead of the Upgrade Wizard inside the application if your database contains more than 10000 records per table.
3. Log into the application as an Administrator and use the Repair option to repair and rebuild the database after the upgrade is complete.

Using the Upgrade Wizard

The Upgrade Wizard provides a quick way to upgrade to the latest version of the Sugar application. It includes critical upgrade logic as well as the SQL commands needed to upgrade the application.

Ensure that the config.php file for your installation, located in the Sugar root directory, is writable, before using the Upgrade Wizard.

Note: Manual upgrades by file replacements and running the upgrade SQL are not supported.

To upgrade Sugar using the Upgrade Wizard

1. Download the appropriate Sugar Upgrade zip file from the Sugar website to your local machine. For example, download the SugarPro-Upgrade-6.0.x-to-6.2.0.zip file to upgrade Sugar Professional from version 6.0.x to 6.2.0. Download the appropriate conversion file to convert to Sugar Professional or Sugar Enterprise.
2. Log into your existing Sugar application as the administrator and click **admin** on the right-hand corner of the page.
3. Click **Upgrade Wizard** in the **Systems** panel of the **Administration Home** page.

   This displays the **Upgrade Wizard** page.
4. Click **Next**.

   This displays the **System Checks** page. and Sugar begins the system check process. The Systems Check page indicates that there were no issues if the system check process completes successfully. Issues with file permissions, database, and server settings are listed on the page if the system check process encountered any problems.
5. Click **Next** if the system check is successful.

   This displays the **Upload an Upgrade** page.
6. Click **Browse,** and navigate to the location of the upgrade zip file and select it.

   The path to the file displays in the **Upload an upgrade** field.
7. Click **Upload Upgrade** to upload the package to the Sugar application.

   The system uploads the package and displays it on the page. Use the **Delete Package** button to remove the package if necessary.
8. Click **Next**.

   This displays the **Preflight Check** page.

   Click **Show Schema Change Script** to view differences in the Sugar databases schema between your current and new Sugar versions.

   By default, the **Upgrade Wizard Runs SQL** option is selected as the database update method. Select **Manual SQL Queries** from the **Database Update Method** drop-down list and select the **Check when SQL has been manually run** box, if you ran the SQL queries manually.
9. Click **Recheck** to rerun Preflight Check. Click **Next** to skip this step.

   This displays the **Commit Upgrade** page.

   You can also click **Show** to see a list of files that were copied and the rebuilt results. You can also view skipped queries.
10. Click **Next**.

    During the upgrade process, Sugar performs a three-way merge between the customized instance on old version, default instance on old version, and default instance on new version. This three-way merge adds any fields that have been added to the default module layouts in the new version to the corresponding module layouts in the existing version, if the module layouts in the old version were not customized through Studio (or in the appropriate upgrade-safe way) prior to the upgrade. The three-way merge also changes the placement of fields in non-Studio-customized module layouts to match the placement in the default module layouts.

Sugar displays the **Confirm Layouts** page as Step 5 of the upgrade process if the existing module layouts have been customized, and there are changes to the default fields and field placement in the new module layouts.

The **Confirm Layouts** page lists the module layouts that have changed in the new version. The administrator has the option of applying the changes to the existing module layouts. By default, all of the listed module layouts are selected to be merged during the upgrade.

For example, in 6.1.0, Sugar added the **Assigned To** fields to the default **DetailView** and **EditView** layouts for Notes and for Email Templates. If the instance being upgraded has a customized **EditView** layout for Notes, but no customized layouts for Email Templates, the following will occur during the upgrade:

a. The **Confirm Layouts** page appears as Step 5 in the Upgrade Wizard
b. The **Confirm Layouts** page displays the Notes module with the **EditView** and **DetailView** layouts. The **Email Templates** layouts do not display on the **Confirm Layouts** page because the existing layouts were not customized.
c. The Administrator has the option of choosing to merge the changes in the Notes module with the existing customized **EditView** layout.

11. Uncheck the module if you do not want to add the new fields to a module.
12. Click **Next**.

    This displays a message confirming that the layouts were successfully merged (if you chose to update your modules).
13. Click **Next**.
14. The **Debrief** page confirms the upgrade installation. Complete the steps for manual merging of files or running SQL queries now.
15. Click **Done**.

    This displays the Home page indicating that the upgrade is complete.
16. Click **Repair** and select the **Rebuild Relationships** and **Rebuild Extensions** options in the **Systems** panel of the **Administration Home** page.

    For more information, see Repair.
17. Manually merge the files by extracting the skipped file from the patch zip file if you unchecked any files to prevent the Upgrade Wizard from overwriting them. Merge the file installed in the Sugar application directory.

Note: Check the upgradeWizard.log file in the Sugar folder for information on unsuccessful Sugar upgrades.

Locking down the Upgrade Wizard

You can lock down the Upgrade Wizard to ensure that no user with administrative privileges can upgrade any of them, if you are managing multiple instances of the Sugar application and you want to maintain complete control over the Sugar instances. Follow the steps listed below to lock down functions on the Administration page:

1. Navigate to the config.php file in the Sugar root directory.
2. Set the following parameter to `true` as below:
   `$sugar_config['admin_access_control']=true`
3. Save the file.

Converting Sugar Editions

The Upgrade Wizard enables you to convert from one Sugar edition to another. Obtain the Sugar license key from your sales representative for the Sugar edition you want.

The table below lists the supported conversions.

Sugar Edition	Supported Conversion
Sugar Community Edition versions 6.0.x, 6.1.x	Sugar Ultimate 6.2.0 Sugar Enterprise 6.2.0 Sugar Corporate 6.2.0 Sugar Professional 6.2.0
Sugar Professional versions 6.0.x, 6.1.x	Sugar Ultimate 6.2.0 Sugar Enterprise 6.2.0 Sugar Corporate 6.2.0
Sugar Enterprise versions 6.0.x, 6.1.x	Sugar Ultimate 6.2.0

You will need to obtain the Sugar license key from your sales representative for the Sugar edition you want.

Conversions are a two-step process. First you must upgrade your existing Sugar application from the current version to 6.2.0. You can then convert to the desired Sugar edition using the appropriate conversion zip file.

For example, to move from Sugar Community Edition 6.1.3 to Sugar Enterprise 6.2.0, you must first convert to Community Edition 6.2.0 using the 6.1.x-to-6.2.0.zip file. You can then convert from Community Edition 6.2.0 to Enterprise 6.2.0 using the SugarCE-to-SugarEnt-Conversion-6.2.0.zip file.

Using the Sugar Silent Upgrader

The Silent Upgrader enables you to avoid some of the limitations that the web application environment may have that prevents the Upgrade Wizard from completing the upgrade. The upload size limit (by PHP and sometimes even by web server), the CGI (or equivalent) timeout limit, and the MySQL (or equivalent) session timeout limit are some of the challenges people run into when upgrading Sugar. The Silent Upgrader either avoids the limitations or better controls the settings in its stand-alone execution environment.

Note: The silentUpgrade.php script creates new files for the user. For example, for the root user it create files as user/group root. Since Apache cannot read this, you must ensure that the web server user has the permissions to read and write the script.

Follow the steps listed below to ensure a smooth upgrade, if you are using an Oracle database:

1. Ensure that the Sugar Database User has permissions to create and execute procedures in the Oracle database.
2. Increase the PHP memory limit to 1 GB if you have a large data set, and you are not using PHP 5.3 with the `gc_enable` parameter enabled for circular reference garbage collection. You can change the PHP memory limit back to its previous value after completing the upgrade. For more information on circular reference garbage collection refer to www.php.net.

To upgrade Sugar using the Silent Upgrader

1. Execute the **silentupgrade.php** script from the command line on the server where the Sugar instance is installed:

   ```
   php.exe -f silentUpgrade.php [upgradeZipFile] [logFile]
   [pathToSugarInstance] [adminUser]
   ```

   where:

   `upgradeZipFile` is the full path to the upgrade zip file. For example, SugarCE-Upgrade-6.*1*.0-to-6.2.0.zip

   `logFile` is the full path to the log file.

   `pathToSugarInstance` is the full path to the instance being upgraded.

   `adminUser` is a valid admin user name.
2. Log into the Sugar application as the administrator and rebuild relationships and extensions using the **Repair** option in the **Systems** sub-panel after upgrading.

Uninstalling a Sugar instance

Follow the steps listed below to uninstall your Sugar instance:

1. Navigate to the location where Sugar is installed on your machine and delete the Sugar root directory.
2. Delete the Sugar database schema from the MySQL, MS SQL server database.

Getting Started

This guide assumes that you have the required resources to access the Sugar application and you are familiar with how to use them. Contact your system administrator for issues and concerns.

Topics include:

- **Prerequisites**
- **Accessing Sugar and setting your User Preferences**
- **Managing your password**
- **Managing themes**
- **Security timeout**

Prerequisites

Ensure that you have the following installed and configured on your machine before using Sugar:

- A web browser application on your computer. Sugar has been successfully tested on the following browsers.

Web Browser	Version	URL
Google Chrome	Latest (12)	http://www.google.com/chrome
Firefox	3.5, 3.6	http://www.mozilla.org/firefox
Microsoft Internet Explorer	7.0, 8.0	www.microsoft.com/ie
Safari	5.0	http://www.apple.com/safari/

- JavaScript support and cookie support enabled within the web browser used to access Sugar.
- Network access to a server that is running the Sugar software.

  Your system or network administrator can provide you with a web address (URL) from which the system can be accessed.

Note: For detailed information on supported versions for all the Sugar components, see Downloading and installing Sugar.

Web browser window controls

Sugar dynamically generates the HTML pages that the web browser displays when you click certain buttons on a web page. Sugar may not display these pages if you use the browser's Back and Forward buttons. It is recommended that you use the **Actions** menu on the module tab to navigate back and forth in the application.

Note: Sugar is designed for a minimum 1024x768-pixel screen display resolution.

Accessing Sugar and setting your User Preferences

Use a supported web browser to access the Sugar application. You will need a user account and login credentials to log into the application. The System Administrator must provide you with your user name and password. You can change your password after you log into Sugar.

Troubleshooting tips

Perform the tasks listed below if you cannot log into Sugar:

- Verify that the username and password are correct, including any upper-case letters
- Verify with your system administrator that you have the correct username and password
- Contact your system administrator to ensure that your account has not been disabled

The **Forgot Password?** link displays in the **Log In** window if the Administrator has enabled this feature. Click this link if you cannot remember your password, enter your username and password in the relevant fields, and click **Submit**. Sugar will send you a link to the page where you can reset your password. Contact the administrator for a new password if this link is not available to you.

Available languages

The default language in Sugar is US English. In addition, Sugar provides the following languages:

- Czech
- Bulgarian
- Chinese
- Danish
- Dutch
- English-UK
- Estonian
- French
- German

- Hebrew
- Hungarian
- Italian
- Japanese
- Lithuanian
- Norwegian
- Polish
- Portuguese
- Romanian
- Russian
- Spanish
- Swedish
- Turkish

Individual users can select a different language from the **Language** drop-down field in the **Log In** page. The administrator can change the default language for the entire organization.

Administrators can install additional languages, if necessary. Language packs are available at http://www.sugarforge.org.

Configuring User Preferences

To access Sugar and configure your User Preferences

1. Enter the Sugar URL in the address bar of your web browser.

   This displays the Sugar **Log In** page with fields to enter your Sugar credentials. The Sugar Log In page also displays a Language drop-down field from which you can select the language that you want to display in Sugar.

   For information on using the Admin Wizard that displays when you login as an administrator, see Configuring Settings in Sugar.
2. Enter your username and password.
3. Click **Log In**.

   This displays the User Wizard if you are a regular user. The Sugar User Wizard guides you through the process of entering your Profile information and Locale settings in Sugar. You can change your profile information and locale settings in the Wizard if the administrator has already configured these settings for you. You can also change them from the User Preferences page after you log into Sugar.

   The administrator also configures a default SMTP email server to send out email notifications and alerts. An **Email Settings** tab displays in the Wizard if the administrator has enabled users to use this email server for outgoing emails. Specify your username and password in the **Email Settings** tab to send out emails from that email server.

For information on user preferences, see Editing your User Preferences.

4. Click **Next** to navigate from one page to the next; make the desired changes to your settings, and click **Finish** to exit the wizard.

   This displays your Sugar Home page. You can now begin using the Sugar application. For information on using your Home page, see Home Module.

User session rules

Sugar has set the following rules for user sessions for security purposes:

- You cannot log into a Sugar instance simultaneously using the same account from two different machines or browsers.
- Two different users cannot log into a Sugar instance separately with two simultaneous sessions using the same username. When you are logged into a Sugar instance, if another person logs in using your credentials, you will be automatically logged out. Hence, to avoid conflict, it is recommended that you do not share your credentials with other users.

Sugar enables you to do the following:

- Concurrently log into Sugar through the Sugar Plug-in for Outlook (or other plug-ins and extensions using Web Service APIs) when logged into Sugar through a browser
- Open an unlimited number of pages of a Sugar instance within a single browser

Editing your User Preferences

When you log into Sugar, your name displays on the top right corner of the page. You can click it to view and edit your default settings. You can also view the list of modules you are allowed to access and your access permissions, such as View, Edit, and Delete, for each module. You can edit some of these settings to suit your requirements, such as the Sugar modules that you want to view when you login. You cannot change your level of access to modules or view modules that you are not allowed to access.

User Profile

This tab displays your profile information such as your full name, your Sugar username, phone number, address, title, and email address. It also displays the teams that you belong to.

Employee Information

Employee Information is entered by the administrator and displays information such as your title, your supervisor's name, and your contact information.

Email Settings

The Email Settings section displays your email address and email client. The system administrator has the ability to setup one or more email addresses and specify your primary email address for automated responses to emails. For information on editing this information, see To change your email settings.

You can send emails automatically if the administrator has setup an SMTP server and has enabled you to use the associated mail account to send emails. Fields for the SMTP username and password are displayed if the administrator has not enabled you to use the mail account. Enter the username and password for your mail account to send out emails using this SMTP server. For information on specifying another SMTP server from the Emails module see **Configuring Email Settings.**

Default Teams

Use this panel to view the teams to which the Systems Administrator has assigned you. You cannot edit your team memberships.

Password

Use the Password tab to change your password. For more information on changing your password, see **Managing your password**.

Themes

Use the Themes tab to change the theme of your Sugar interface. For more information on changing your theme, see Managing themesManaging themes.

Advanced

The Advanced tab displays the following sections:

User Settings

In this section, you can change the default settings for the following:

Export Delimiter. This is the character that will be used to separate field values when you export data from Sugar. The default is a comma (,).

Import/Export Character Set. Select a character set from this drop-down list to export and import data and generate Vcards.

The administrator sets the default export settings such as the delimiter used to separate data in export files and the default character set used to import and export data from Sugar. You can override the administrator's settings with your own. The default character set to export data is UTF-8. Specify the appropriate character encoding for your locale if your locale is not US or Western Europe. This ensures that the character set used by the Sugar system to create the exported file is mapped to the correct character set on your machine. For example, MS Windows uses SJIS in Japan. Users in this locale need to select SJIS as the default export character set instead of UTF-8. This character encoding setting is also used when importing data into Sugar. To generate Quote PDFs, ensure that you select the appropriate character set for the chosen language.

Show Full Names. Select this option to display your full name in **My Activity Stream** and in the **Assigned to** field in records.

Notify on Assignment. When you enable this option, you will receive an email notification when a record from any of the following modules is assigned to you:

Accounts
Contacts
Opportunities
Leads
Meetings
Calls
Tasks
Cases
Bugs
Quotas
Quotes
Knowledge Base
Campaigns
Projects

Reminders. Select a default time interval as a reminder for calls and meetings from the **Reminders** drop-down list.

Mail Merge. You can enable this option to merge data such as names and addresses from Sugar with form letter templates created in Word if you are using Sugar Plug-in for Word. This needs to be enabled by the System Administrator.

Default Teams. Click **Select** to choose a team as your primary team. You can be a member of multiple teams. Click **Add** to add a new field and then click **Select** to choose the team to specify a secondary team.

No Opportunities. Select this option if you are not involved in sales activities and do not need to be assigned opportunities.

You can also assign yourself to the role of a Group User through the **User Management** option on the **Administration Home** page if you are an administrator.

Layout Options

You can change the default settings for the following in this section:

Grouped Modules. Select this checkbox to view module tabs in the navigation bar, based on pre-defined groups. All modules with appear in the navigation bar if this feature is not selected.

Edit Tabs. Enables you to hide modules that you do not require. Move the module from the **Display Tabs** list to the **Hide Tabs** list using the right arrow to hide the module. Use the left arrow to move a module name from the **Hide Tabs** list to the **Display Tabs** list to display the module. These settings can be applied globally by the administrator.

You can change the order in which module tabs display in Sugar. Select the module in the **Display Tabs** list and click the Up arrow to move up a module; click the Down arrow to move down the module.

Number of tabs. Enter a value to specify the maximum number of module tabs to display at the top of page before the overflow menu, indicated by a down arrow, appears.

Subpanel Tabs. Enable this option to group subpanels into tabs in the Detail View of records.

Locale Settings

In this section, you can change the default settings for the following:

Date Format. Select a format for date stamps from this drop-down list. The default is mm/dd/yyyy.

Time Format. Select a format for time stamps from this drop-down list. The default is in hours.

Time Zone. Set your time zone.

Name Display Format. Specify display of names in records. The default is Salutation, First Name, and Last Name (sfl).

Sugar uses the specified Name Display Format in **Quick Search** to find related records when you enter a character in the **Related to** field within a record, such as a Call or a Meeting. When you type a character in the field, the system performs a quick search of possible values and presents a list of values starting with that character. If the Name Display Format specifies “s f l”(Salutation First Last), then Sugar displays a list of first names that start with the specified character. For example, if you enter “A”, the system displays first names starting with “A”. Similarly, if the Name display format specifies “s l f”, then the system displays last names starting with “A”.

User Wizard Prompt. This is available to users with administrator privileges only. Select this to enable new users to go through the New User Wizard during first login.

Currency. Select the currency to use in records from this drop-down list. The default is US Dollar.

Currency Significant Digits. Select the number of digits that display after a decimal from this drop-down list.

1000s separator. Enter the character used to separate thousands. The default is comma (,).

Decimal Symbol. Specify the decimal symbol to use. The default is a period (.).

PDF Settings

You can change the default font settings to print PDFs of reports, quotes, and projects in this section.

Font for Header and Body. Select a font for the header and body of PDF documents from this drop-down list.

Main Font Size. Enter a number to specify the font size in the PDF header.

Font for Footer. Select a font for the footer in PDF documents from this drop-down list.

Data Font Size. Enter a number to change the default font size of the PDF body.

Calendar Options

Publish Key. Enter a key number to publish available/busy information from an external calendar application, such as Microsoft Outlook. Provide this key to users of other calendar applications if they want to view your calendar. Sugar allows access to your calendar to individuals who can provide this key.

External Accounts

The following Connectors are available in Sugar:

- Google Docs — Upload to and access documents in Google Docs within Sugar
- Cisco WebEx meetings — Attend and manage online meetings with Cisco WebEx within Sugar
- GoToMeeting meetings — Attend and manage online meetings with GoToMeeting within Sugar
- IBM LotusLive — Access IBM LotusLive meetings and documents within Sugar
- Twitter — Receive constant updates on client status, product comments and customers' tweets within Sugar
- Facebook — View Facebook feeds within My Activity Stream dashlet in Sugar
- LinkedIn — View your LinkedIn contacts at a specific company (Sugar matches the company name in a Sugar field)
- InsideView — View key sales intelligence directly in Lead, Account, Contact and Opportunity records, and get relevant company information, contacts, news, and social media insights within Sugar

You can access the above external applications within Sugar if you have an existing account with the application. For all Connectors except LinkedIn and InsideView, this feature is available out of the box but needs to be enabled by the administrator.

Note: You do not need to have an InsideView account. InsideView identifies user accounts by their email addresses. If you have an existing account with InsideView, you are immediately connected to the their service. You can use their free trial version if you do not have an account with InsideView. For more information, see Accessing InsideView.
Also, unlike the other Connectors, LinkedIn and InsideView are enabled by default in all upgrades and new installs. Request your administrator to disable InsideView, if your organization does not want to use it.

You also need to enable the following applications before you can access them in Sugar: GoogleDocs, Cisco WebEx, and GoToMeeting.

Follow the steps listed below to enable GoogleDocs, Cisco WebEx, or GoToMeeting in Sugar:

1. Click your username on the upper right hand corner of any Sugar page.

   This opens the **Edit User** page.

2. Click the **External Accounts** tab in the **Edit User** page and click **Create**.
3. Select the required application from the **Application** drop-down list, populate all other mandatory fields indicated by a red asterisk, and click **Save**.

To verify that your external account has been successfully added to your Sugar profile, navigate to your User page and click the **External Accounts** tab. You should be able to see the external account among the listed applications.

For IBM LotusLive, the login expires after 10 hours. You need to re-enter your login information to access the application from Sugar.

For Google, GoToMeeting, IBM LotusLive, and WebEx, you can have only one account of the application with each Sugar instance. For example, if you try to create an additional Google account in the External Accounts section, Sugar deletes the previous account and adds the new account with the following message:

An account for this application already exists. We have reinstated the existing account.

Access

This tab displays the module access permissions that the administrator has granted you to perform specific actions such as editing and deleting records. The administrator can enable or disable access to any Sugar module. You cannot edit these settings.

Roles

Scroll down the Access page to view roles that the system administrator has assigned to you. You cannot edit your roles.

Downloads

This tab displays links to Sugar Plugins for Microsoft Outlook, Microsoft Word, and Microsoft Excel. Click the appropriate link to download a plug-in to your local machine. You can then install it on your machine.

Click **Reset User Preferences** and **OK** to revert to your default settings after saving any changes that you made.

Similarly, you can restore the default settings by clicking the **Reset Homepage** after customizing your Home Page.

Editing Email Settings

You can view and edit your default email address. The default SMTP email server is used to send emails from Sugar if this has been enabled by the administrator.

To change your email settings

1. Click your name on the top right corner of the Sugar page.

   This displays the **Users** module.
2. Scroll down to the **Email Settings** sub-panel on the **User Profile** tab.
3. Overwrite existing email address with new email address and click **Save** to change an existing email address.

Click the plus (+) sign, populate new field, and click **Save** to add another email address.

You can add multiple email addresses. The first email address that you enter is selected as the primary email address by default. Click the **Primary** button corresponding to the email address that you want to specify as the new primary address to select a different email address as the primary address.

Select the **Reply-to** radio button corresponding to the email address that you want to specify as the new reply-to address to specify a different email address for automated responses to emails.

4. Select the email client of your choice from the **Email Client** drop-down list. Select **Sugar Email Client** to send emails using the default email client that the administrator has configured, or **External Email Client** to use an external email client such as Microsoft Outlook.
5. **Email Provider**. This field displays the email server address if you selected External Email Client.
6. Enter the SMTP user name and password for your email account if you selected Sugar Email Client. (You will be using the administrator-configured SMTP server to send out emails).
7. Click **Send Test Email** to send out a test email to ensure that the settings are correct.
8. Click **Save** to save your settings; click **Cancel** to exit the page without saving your changes.

Managing your password

You will be provided with a temporary password when the administrator initially grants you access to Sugar. Change this password after you log into Sugar. Ensure that you choose a password that is easy for you to remember, but difficult for others to guess. You can change your password at any time. For security reasons, it is recommended that you change your password periodically.

To change the password

1. Log into Sugar and click your name on the top right corner of any Sugar page.

   This displays the Edit User page.
2. Click the **Password** tab.

   If there are password rules, they will display in this section. Your new password must adhere to these rules. Each rule will be marked with a red cross. When you enter your password, as each rule is met, the cross will be replaced with a green checkmark. You can save your new password only after all the rules have checkmarks.
3. Input current and new passwords in the relevant fields and click **Save**.

Resetting a forgotten password

The **Forgot Password?** link displays in the **Log In** window if the administrator has enabled the Forgotten Password feature.

Follow the steps listed below to request for a new password if you have forgotten your existing one:

1. Click the **Forgot Password?** link in the Sugar **Log In** window.
2. Input relevant information in the **User Name** and **Email Address** fields and click **Submit**.

   This displays a message confirming that your request has been submitted. You will also receive an email with a link to access the **Password Reset** page. Populate fields with required information and click **Save**.

Contact your system administrator for a temporary password if you do not see the **Forgot Password?** link in the **Log In** window. Log into Sugar with the temporary password and change it.

Managing themes

Themes enabled by the administrator are displayed in the **Themes** tab of your **Edit** user page. Follow the steps listed below to change your Sugar theme.

1. Log into Sugar and click your name on the top right corner of any Sugar page.

   This displays the Edit User page.
2. Click the **Themes** tab.

   This displays the list of themes enabled by the administrator.
3. Click a theme name to preview it in the right pane.
4. Select the desired theme by clicking on the theme name.
5. Click **Save**.

Security timeout

For security reasons, the system automatically logs you out if you do not perform any tasks for a specified period of time. This timeout period is determined by two factors:

- The lifetime of the PHP Session Cookie (PHPSESSID). The default lifetime is until the browser is closed.
- The PHP session timeout period. The default value is 1440 seconds (24 minutes).

If you do not perform any tasks for a certain time period, the system logs you out either because the browser session or the PHP session timed out.

Click any button on the page when you are ready to resume working. This automatically directs you to the **Log In** page. You can also close the web browser and navigate to the **Log In** page in a new browser window.

Navigating the User Interface

This chapter describes the layout of the Sugar user interface and presents an overview of the functionality.

The following topics are discussed in this chapter:

- **Overview of the Sugar User Interface**
- **Viewing and managing record information**
- **Integrating data from external sources**
- **Managing Sugar Dashlets**
- **Merging Duplicate Records**
- **Searching for Information in Sugar**

Overview of the Sugar User Interface

The Sugar user interface consists of various modules designed to help you manage customer-related records such as contacts, accounts, products, and quotes. Each module, representing a record type, groups the tools and functions needed to perform specific tasks. This enables you to work more efficiently.

You can relate records to one another. For example, a contact can be related to a specific account. When you view a record in Sugar, the system also displays related records. For example, the Detail View of an account displays related contacts in the **Contacts** sub-panel.

When you log into Sugar, the **Home** module displays on the page. Tabs for other modules display alongside the **Home** tab. You can click a tab to open the module to view, create, and manage records.

A drop-down menu is located on the far right of the module bar. You can use this menu to view sets of modules under groups, such as Sales, Marketing, Activities, and so on. This feature is available in all Sugar themes, except the Classic theme.

The Home page displays a list of your activity records such as calls and meetings. It also displays emails, accounts, opportunities, leads, and cases that are assigned to you. For more information, see **Home Module**.

Common Module options

The following options are available from any page in the Sugar application:

- **Shortcut Bar**. This static bar, spanning across top of the page, displays the Global Search field and icons for Quick Create forms to create records such as accounts, contacts and opportunities. Quick Create forms enable you to create a record from anywhere in Sugar without navigating to the module associated with the form. Place the cursor on an icon to view the form's name and click the icon to open the form. You can also access this form from the sub-panel of a related record that displays in a record's Detail View. For example, you can create a contact from the Shortcut bar, and also from the Contacts sub-panel of an account's Detail View page. Administrators can add, remove, and move fields to customize the Quick Create forms.
- **Global Search field**. This field, located in the Shortcut Bar, enables users to enter a letter or a keyword to search all the modules for matching records. For more information, see **Global Search**.
- **System links**. System links, located at the top right-hand corner of any Sugar page, are common to all modules. These include your <name>, **Logout**, **Employees**, **Support**, **Help**, and **About**. When an administrator logs in, the **Admin** link is also visible.

  Click the left arrow located next to the **Logout** link to display all the System links. Click the right arrow next to the **About** link. The slider bar hides all the System links and displays only your name and the **Logout** link.

  - **Your Name**. Click this link, located at the top right of the page, to view your settings. These settings include your profile information, layout options, and so on. For more information, see **Editing your User Preferences**.
  - **Employees**. Click this link to view a list of other employees in your organization. This list, maintained by the administrator, displays information such as name, title, phone number, department, and email address. Click a name to view detailed information about the employee. Every user is listed as an employee. However, every employee may not be a Sugar user. For more information, see **Employees Module**.
  - **Admin**. This link displays only if you login as the administrator. Click this link to access the Administration Home page to perform administrative tasks. For more information, see **Administering Sugar**.
  - **Support**. Click this link to view the Sugar Support page, which provides links to Sugar documentation, Knowledge Base, FAQs, and training courses to guide you through the process of learning the Sugar application.
  - **Help**. This is a context-aware link to the Application Guide. For example, if you click on the Help link in the **Contacts** module, you will be directed to the **Contacts** section of the Application Guide.
  - **About**. Click this link to learn more about SugarCRM and view version information. This link also provides credits and source code references.
- **Module menu**. This menu lists options to perform actions such as creating and viewing records, and the last viewed record(s). Mouse-over a module tab to view the actions you can perform within the module.

- **Last Viewed.** This list displays records that you last accessed within the module, as well as calls and meetings you recently scheduled. Place the cursor on a module tab to view this list. To access a record again, select the record link.

Sugar Modules

The core Sugar modules are as follows:

- **Home**. The Home module provides a quick view of your activities and assigned records in the form of Sugar Dashlets. If you access certain records frequently, you can mark them as favorites and add a **My Favorite Records** dashlet. For more information on this module, see **Home Module**. For more information on dashlets, see **Managing Sugar Dashlets**.
- **Accounts**. Click this tab to view the **Accounts** module. Use this module to manage your customers. You can track information about an account, including website, address, number of employees and other data. You can link business subsidiaries to the parent organization to show relationships between accounts. For more information on creating accounts, see **Accounts Module**.
- **Contacts**. Click this tab to view the **Contacts** module. Use this module to track people involved in doing business with your organization. You can track contact information such as title, email address, and phone number. Contacts are usually linked to an account. For more information, see **Contacts Module**.
- **Opportunities**. Click this tab to view the **Opportunities** module. Use this module to track potential customers. Opportunities help you manage your selling process by tracking attributes such as sales stages, probability of close, deal amount, and other information. For more information, see **Opportunities Module**.
- **Calendar**. Click this tab to view the **Calendar** module. Use this module to view scheduled activities (by day, week, month, or year) such as meetings, tasks, and calls. You can also share your calendar with your coworkers to coordinate your daily activities. For more information, see **Calendar Module**.
- **Calls**.Click this tab to view the **Calls** module. Use this module to manage outbound and incoming phone calls between you and your customers. For more information, see **Calls Module**.
- **Meetings**. Click this tab to view the **Meetings** module. Use this module to manage meetings, including both internal and external invitees, that you schedule or accept. For more information, see **Meetings Module**.
- **Emails**. Click this tab to view the **Emails** module. Use this module to send and receive emails. You can also automate email management and create email templates for automated responses and email-based marketing campaigns. For more information, see **Emails Module**.
- **Tasks**. Click this tab to view the **Tasks** module. Use this module to manage a list of actions that you need to complete by a specific date. For more information, see **Tasks Module**.
- **Notes**. Click this tab to view the **Notes** module. Use this module to manage notes and file attachments. For more information, see **Notes Module**.

- **Reports**. Click this tab to view the **Reports** module. Use this module to create custom reports for any module such as **Accounts**, **Opportunities**, or **Cases**. For more information, see **Reports Module**.
- **Documents**. Click this tab to view the **Documents** module. Use this module to view a list of documents that you can download. You can also upload your own documents, assign publication and expiration dates, and specify the users who can access them. For more information, see **Documents Module**.
- **Leads**. Click this tab to view the **Leads** module. Use this module to track individuals or companies that are potential customers. When you choose fields in the Web to Leads form in Sugar from the fields in the Leads module, Sugar generates the HTML code to display the form and the code to connect entered field values to the fields in the Leads module. For more information, see **Leads Module**.
- **Targets.** Click this tab to view the **Targets** module. Use this module to track and manage targets. For more information see **Targets Module**.
- **Target Lists.** Click this tab to view the **Target Lists** module. Use this module to create target lists and to track and manage mass marketing campaigns. For more information see **Target Lists Module**.
- **Campaigns**. Click this tab to view the **Campaigns** module. Use this module to create and manage marketing campaigns. You can implement and track telemarketing, mail, or email-based marketing campaigns. For more information, see **Campaigns Module**.
- **Quotes**. Click this tab to view the **Quotes** module. Use this module to quote a price for a specific quantity of a product to a customer. For more information, see **Quotes Module**.
- **Forecasts**. Click this tab to view the **Forecasts** module. You can view the committed sales amounts of individual users as well as teams for a specific time period. For more information, see **Forecasts Module**.
- **Cases**. Click this tab to view the **Cases** module. Use this module to help Customer Support manage product problems and inquiries by tracking information for each case such as its status and priority, the user assigned, as well as track related open and completed activities. For more information, see **Cases Module**.

In addition, Sugar provides the following modules, which your administrator can make available to you:

- **Projects**. Click this tab to view the **Projects** module. Use this module to track and manage tasks for multiple projects. Tasks can be assigned to different users and assigned estimated hours of effort. You can update information as tasks progress or are completed. For more information, see **Projects Module**.
- **Products**. Click this tab to view the **Products** module. Use this module to view and manage records that were sold to customers. For more information, see **Products Module**.
- **Bug Tracker**. Click this tab to view the **Bug Tracker** module. Use this module to report and track bugs associated with a product. Customer support representatives can manage software-related support problems or inquiries to completion by tracking information for each bug such as its status and priority, resolution,

assigned user, release of software involved, type (defect or feature) as well as track related activities. For more information, see **Bug Tracker Module**.

- **Contracts**. Click this tab to view the **Contracts** module. Use this module to view, create, and manage contracts and related documents, quotes, contacts etc. For more information, see **Contracts Module**.
- **Knowledge Base**. Click this tab to view the **Knowledge Base** module. Use this module to create, publish, and search for articles within Sugar. For more information, see **Knowledge Base Module**.

Grouped Modules

Users have the option to view modules as individual module tabs, or as sets of modules belonging to one of the following groups:

- Sales - Home, Accounts, Contacts, Opportunities, Leads, Contracts, Quotes, Products, and Forecasts
- Marketing - Home, Accounts, Contacts, Leads, Campaigns, Targets, and Target Lists
- Support - Home, Accounts, Contacts, Cases, Bug Tracker, and Knowledge Base
- Activities - Home, Calendar, Calls, Meetings, Emails, Tasks, and Notes
- Collaboration - Home, Emails, Documents, Projects, and Knowledge Base
- Reports - Home, Reports, and Forecasts

To view grouped modules

1. Mouse over the **All** drop-down list located at the far right on the Module navigation bar.
2. Select the group of your choice to view tabs for only those module tabs that belong to the group.

   To view all the module tabs, select **All** from the drop-down list.

Viewing and managing record information

Every module represents a record type such as accounts or opportunities. Sugar provides three types of views for every module: List View, Detail View, and Edit View.

List View: The List View displays links to individual records in a table format. By default, Sugar sorts records in descending order of their creation date. The List View also displays other relevant information such as the name, email address, and phone number for each record. You can change the default view by adding or removing columns depending on the information that you want to view. For more information, see **Searching for Information in Sugar**.

You can mark records that you frequently access as **My Favorites** from the List View of most modules. You can use the **My Favorites** search filter to find your favorite records quickly. You can also add a **My Favorite Records** dashlet to your Home page to view these records.

You can click a record name to view its details. Alternatively, if you have Edit permissions, you can click the Edit icon located next to the record name to navigate to the Edit View.

The **Actions** drop-down list, located above the Name column in List View, provides options to perform actions such as Delete, Email, Mass Update, Merge, Add to Target List, and Export one or more records.

Sugar paginates long List Views. Click any column name that has a double-arrow icon beside it to sort the list. Click the column name again to reverse the sort order.

Detail View: The Detail View displays available information such as the record name, modified date, and related records. The related records are displayed in the separate sub-panels. For example, a Contact's Detail View displays sub-panels for related Activities, History, Documents, Opportunities, and so on. The Detail View enables you to edit, duplicate, find duplicates, manage subscriptions, and view change log for the record. You can also create, edit, and delete related records in the sub-panels.

Edit View: The Edit View enables you to update existing information and add more details if needed.

To view and edit a record

1. Click a record name in a module's List View, to see its Detail View.
2. Click **Edit** in the record's Detail View to edit the record.
3. Input the required information and click **Save**.

   Click **Cancel** to exit the Edit View without saving your changes.

To manage related information in sub-panels

The Detail View of a record displays related information in sub-panels. Each sub-panel consists of rows to list links to records. You can add more records to the list, if necessary This feature enables you to quickly associate multiple records. For example, you can associate more than one contact with an account.

- To minimize a sub-panel, click the arrow located to the left of a sub-panel's name. This hides the sub-panel, but still displays its name and the arrow icon. Click the arrow icon to display the sub-panel.
- To move a sub-panel to a different location on the page, mouse over the sub-panel name, click and drag the panel to the desired location on the page.
- To create a new record, click **Create** below the sub-panel name. This displays the the Quick Create form. Input required information and click Save. Click Full Form to include additional details and click Save.
- To choose a record from an existing list, click Select above the sub-panel.

  A list of available records for the sub-panel displays in a separate window.
- To select one or more records from the list, click the box adjacent to the record name and then click Select.
- To delete a related record, click the **rem** icon located to the extreme right of the record row, and click **OK**.

Tracking User Activity

The Last Viewed list displays recently accessed records, as well as calls and meetings you recently scheduled. You can view this list in the module menu, which displays when you point the cursor at a module's tab. To view a record again, click its link in the Last Viewed list.

You can also create tracker reports to track information such as how many modules were accessed, how many files were modified and so on. For more information, see **Viewing and Creating Tracker Reports**.

Creating and Managing Records

You can access a module only if the administrator grants you permission. Your ability to perform actions within a module, such as creating, editing, and deleting records also depend on the access permissions that the administrator grants you.

Sugar displays existing records on a module's Home page. You can see this List View when you select the **View** option from the module menu.

Assigning Records to Users and Teams

When you create a record, by default, you are the user as well as the team assigned to manage it. You can change the user and team assignments if required. Assigning a user to the record is optional, assigning a team is a requirement. The assigned user is not required to be a member of the assigned team.

Assigning a record to a team ensures that data is viewed only by users who have the authority to do so. The actions that each team member can perform, such as viewing, editing, and deleting records depends on the permissions that the administrator has granted them.

When a record is assigned to a user, Sugar sends an email notifying the user. You can view the assigned user from the record's Detail View and Edit View.

The following teams are available in Sugar:

Private: All users have their own private team. By default, records that you create are assigned to your private team to allow you to access and manage them.

Global: This is a universal team consisting of all Sugar users. All users can view any record that is assigned to the Global team.

Regular: A regular team may reflect a geographical area, a specific task, or other considerations. When a record is assigned to a regular team, only its members can access it. Two regular location-based teams, East and West, are available out of the box. The administrator creates and manages regular teams.

Team Types

You can assign multiple teams to the record to enable users who are spread across teams to perform record-related tasks. When you assign a record to more than one team, the first team you select is the primary team by default. You can also select a different primary team.

The module's List View displays the primary team. A Down arrow next to the team name indicates that the record has been assigned to more than one team. Mouse over the arrow to view secondary teams assigned to the record.

You can search for records using team names if the administrator has included Team as one of the search fields.

To assign users and teams to records

1. Select the module in which you want to create a record.
2. Select **Create** from the **Actions** list on any page within the module. For example, to create a record in the **Accounts** module, choose **Create Account**.

   Or

   Click the Create icon located on the top right of any page within the module.
3. Enter the record name.

   Sugar automatically assigns this record to your private team. A green button indicates the primary team. You are also the assigned user.
4. To change the primary team assignment from your default team to a different team, enter the name of the new primary team, or click the **Select** button to select from the Teams list.
5. To change the assigned user, enter the user's name, or click the **Select** button to select it from the **Users** list; if you do not want to assign a user, click the **Clear** button to remove the existing user name from the field.
6. To assign more teams to the record, click the **Select** button to choose new teams from the Teams List, or click the **Add** button to add additional team fields and then enter the team names in the fields.
7. To change the primary team to a different team, select the radio button to the right of the team that you want to specify as the primary team.
8. To delete a team, click the **Trash** icon located next to the **Select** button.
9. Click **Save** to save the record.

To manage record assignments

1. To edit or delete an assigned team or user, click the record name in the List View.

   This displays the Detail View of the record.
2. Click **Edit** in the Detail View.

   This displays the Edit View of the record.
3. To select a secondary team as the primary team, click the button corresponding to the team; to select a team that is not already assigned to the record, enter the name of the team in the primary team field.
4. To assign a new secondary team, click **Add** and enter the team name in the blank field that displays or the screen. Alternatively, click **Select** to choose a team from the Team List.
5. To remove a team, click the **Trash** icon corresponding to the team name.

6. To assign your record to a different user, replace your name with the appropriate user's name. Alternatively, click **Select** and choose from the Users List.
7. Click **Save**.

Tracking and managing record History

The Detail View page of every record displays a History sub-panel that enables you to track record-related activities such as meetings, notes, attachments, and archived emails. Each row in the panel displays icons to edit or remove a record. You can also use this sub-panel to create and record new activities.

To track and manage record history

1. To view the details of a listed note, meeting, attachment, or email, click its title.
2. To sort records in ascending or descending by date, click the Up or Down arrow located next to the **Due Date** column.
3. To add a note or to attach a file, click **Create Note or Attachment**. For more information, see **Creating Notes and Attachments**.
4. To archive an email, click **Archive Email**, copy the email's contents into the Email form, and save it.
5. To view a summary of all the listed records, such as subject, status, and date, in a separate window, click **View Summary**.
6. To edit or delete a record, click the appropriate **edit** or **rem** icon respectively.

Editing and Deleting Multiple Records

Most of the modules provide a **Mass Update** sub-panel on their home page that enables you to edit or delete one or more of the listed records simultaneously. This feature is useful to update information shared by several records such as the assigned user and teams. The fields that you can edit vary depending on the module. For example, in the Contacts module you can change the related account.

To edit or delete multiple records

1. To edit information, in the module's List View, select the records that you want to edit.
2. From the **Actions** drop-down list, select Mass Update to view the **Mass Update** sub-panel.
3. Make your changes and click **Update**.

   You can update team assignments as follows:

   - To select a new primary team from the teams you added, click the **Primary** radio button corresponding to the team name.
   - To assign additional teams to the selected records, click **Select** to select from the Team List, or click **Add** to create a new team field and enter the team name.

- To replace the current assigned teams for the selected records, click the **Replace** radio button; to add the teams to the selected records, click the **Add** radio button.
- To reassign the record to a different user, click **Select** to choose a new user from the Users list.

Other fields that display in this panel vary depending on the module.

4. Click **Update** to save your changes.

   The selected records are updated.

Integrating data from external sources

You can bring data into Sugar from external applications using Sugar Cloud Connectors.

Typically, you use the import functionality to add a large volume of data from an external system. You can also use Connectors to view and add data to a Sugar record from third party data providers. For example, you can search for additional information about an individual or an organization, and use the data to enhance or replace data in Sugar. Sugar provides Connectors to Hoovers, Zoominfo-Person, Zoominfo-Company, Twitter, LinkedIn and InsideView.

Integrating data through a Connector

To integrate data through a Connector

Follow the steps listed below to integrate data through a Connector:

1. Navigate to the record's Detail View.

   Point the cursor at the down arrow located next to the account name to view Connectors to LinkedIn and Twitter. Select Twitter to view and respond to Twitter feeds. Select LinkedIn to view connections within a company.

   To view data in Hoover's and Zoominfo, click **Get Data**.

   The **Data Merge** page displays the first step of the merge process on the screen. The Data List displays separate tabs for all the data sources that your administrator has enabled for the module. The list may not display all the available data to view and merge for the selected data source record. Additional data from the data source record may be available in the pop-up view and/or in the Data Merge form.

The table below lists the fields that display in the Data List View, Additional Details Pop-up window, and the Data Merge Form.

Data Source	Data List View Fields	Additional Details Pop-up/Data Merge Form Fields
Hoover's	City, Country, Company ID, Annual Sales, Company Name	Company Name, City, State, Country, Phone Office, Annual Sales, Street Address 1, Street Address 2, Postal Code, Total Employees
Zoominfo-Person	First Name, Last Name, Current Job Company Name, Job Title, College/ University	First Name, Last Name, Current Job Company Name, Current Job Start Date, Current Job Industry, Current Job Title, Current Job Street Address, Current Job City Address, Current Job State Address, Current Job Zip Address, Current Job Country Code, Biography, Collection/University, Image URL, Zoominfo Person URL, Email Address, Direct Phone, Fax, Affiliation Job Title, Affiliation Company Name, Affiliation Company Phone, Affiliation Company Website
Zoominfo-Company	Company Name, City, State, Website, Revenue, Employees	Company Name, City, State, Website, Postal Code, Country, Industry, Phone, Website, Description, Company Ticker, Company Profile URL, Annual Revenue, Employees

2. Select the tab of the data source you want to use to find data and enter keywords in one or more search fields.
3. Click **Search**.
4. The search results display below. All matches are displayed below the data source tabs. If no matches are found in a data source, Sugar displays a message on the data source's tab.

   To view the data source record in a pop-up window, including additional data that may not display in the List View, point the cursor on the down arrow next to the **Select** button.
5. To use another data source, click its tab and enter the keywords in its search fields. The Search fields can be different for each data source.
6. Click a button in the **Select** column to select a result from the list and click **Merge**.

   You can select one result from each data source to merge data into the Sugar record. The Merge form displays data from all the selected results.

   The left-most column displays existing data in the Sugar record. The columns on the right display data from the data sources.
7. To merge data from a data source to a specific field in the Sugar record, click the corresponding left arrow button. To merge data for all the fields, click **SmartCopy**.

When you have data from two or more data sources, SmartCopy will merge data from the fields in the right-most data source first. The merged data displays in the left column containing the Sugar record fields.

8. Click **Save** to merge the data into the Sugar record.

   Sugar displays the merged data in the record's Edit View.

9. Click **Save** to save the changes in the record.

Accessing InsideView

You can access InsideView information only for the modules that have been enabled by your administrator. Sugar allows the following modules to be enabled for InsideView access:

- Accounts
- Contacts
- Leads
- Opportunities

To view InsideView information

Follow the steps listed below to view InsideView information related to a record:

1. Go to a module that has been enabled for InsideView access.
2. Select a record from the module's List View page.

   This displays the record's Detail View page.

3. Scroll down to the InsideView subpanel in the Detail View page to access InsideView information on the record.

   Click the up or down arrows next to the InsideView link to hide or display the InsideView panel within the records in the module.

4. Read the **terms of use** and **privacy policy** and select the checkbox if you are accessing InsideView for the first time.
5. Click **Get Started**.

When you access the Detail View of Accounts, Opportunities, and Leads, InsideView performs a search based on values in the Account Name field and displays the results in the InsideView panel. For the Contacts module, InsideView searches for the Contact name and displays the results in the InsideView panel. You can narrow down search results by adding the Company name in the search field provided in the InsideView panel.

Note: The extent and depth of information that you can access in InsideView depends on your InsideView subscription. For more information, see http://www.insideview.com/cat-products-difference.html

Managing Sugar Dashlets

Sugar Dashlets are user-configurable panels that enable you to customize your Home page to view information of your choice. You can edit, add, and delete Sugar Dashlets.

A Sugar Dashlet displays a list of records similar to a module's List View. You can add Sugar Dashlets for modules, charts, websites, and tools such as **My Activity Stream** and **Team Notices**. You can filter records based on criteria such as date, status, and subject, and specify the fields you want to view. You can add a dashlet to your Home page for easy access to records that you have marked as your favorites.

My Activity Stream enables team members to notify each other immediately when one of them creates or modifies a record. User Feed enables users to post their status along with external links, images, and YouTube videos. For more information, see **My Activity Stream**.

Team Notices display announcements targeted towards the team to which you belong. Only users with administrator privileges can set up these announcements.

Jot Pad enables you to add a text area to your Home page to jot down tasks, personal or business-related, that you need to complete.

You can add multiple Sugar Dashlets of the same kind and configure each one differently. For example, you can add more than one Activity dashlet. By default, you can add a maximum of ten Sugar Dashlets on your Home page, but the administrator can change this setting. You can also move a Sugar Dashlet to a different location on the page.

Note: Check with your administrator to ensure that the functionality has been enabled if you cannot add or move Sugar Dashlets.

To add Sugar Dashlets

1. Click the **Add Sugar Dashlets** button on the Home page.

   This displays the **Add** menu in a separate window.

2. To add a module Sugar Dashlet, select the module on the **Modules** tab.

   You can add multiple Sugar Dashlets of the same type and configure each other differently. For example, you can add two Sugar Dashlets for Accounts and display different columns, filters, and so on.

   You can add a **My Favorite Records** dashlet to display a list of records that you have marked as your favorites across modules.

3. Select a chart from the **Charts** tab to add a chart Sugar Dashlet.

   You can add a chart dashlet to your Home page or to the Dashboard. The **Charts** tab displays pre-defined report charts under **Basic Charts**. Custom report charts are listed under **My Saved Reports** as well as charts of summation reports. You can add your team report charts as well as **Global Team** report charts.

4. To add a Team Notice, Jot Pad, or My Activity Stream, select it from the **Tools** tab.

5. Enter the URL in the appropriate field on the Web tab and click **Add** to add an external website or a News feed.

   This displays the dashlet on your Home page.

To edit Sugar Dashlets

1. Go to a dashlet (for example, My Calls) and click the Edit Sugar Dashlet icon on the top right corner of the dashlet..

   This displays the <Dashlet name> : Options pop-up window. You can change the dashlet's title, the number of rows that it displays, and the fields that display as columns. You can also filter records that you want to view in the dashlet, based on the subject, assigned user, due date, and so on. Click Save after you have made the desired changes to the dashlet settings.
2. To sort a dashlet by a column such as user name or start date, click the column name on the Home page.

To manage Sugar Dashlets

1. To move a Sugar Dashlet, click anywhere on its title and drag and drop the dashlet to its new location.
2. To remove a Sugar Dashlet, mouse over the title bar, click the **Delete** icon and then then click **OK** in the delete confirmation pop-up box.
3. To manually refresh a Sugar Dashlet, mouse over the title bar, and click the **Refresh** icon.
4. To modify the auto refresh setting on a dashlet, select the desired Auto-Refresh interval from the **Auto-Refresh** drop-down list in the <Dashlet name> : Options pop-up windowand click Save.

My Activity Stream

The My Activity Stream dashlet on your Home page enables team members to notify each other immediately when one of you creates a new contact, lead, opportunity, or case. Team members are also notified when a lead is converted and when a case or opportunity is closed.

My Activity Stream also enables you to post your status along with external links, images, and YouTube videos. Users with Twitter and Facebook accounts can view their feeds within My Activity Stream.

Note: If you select the Show Full Name option in your User settings, your full name will display in **My Activity Stream** entries.

Users can identify records as My Favorites and run searches based on the My Favorites filter.

To add a My Activity Stream Dashlet

1. Click **Add Sugar Dashlets** on your **Home** page.

   This displays the **Add** pop-up window.

2. Select **My Activity Stream** from the **Tools** tab in the **Add** pop-up window.

   This displays the **My Activity Stream** dashlet on the selected tab of your Home page. You will see your username and a field to enter the status information to post, if User Feed is enabled

3. Click the down-arrow next to your name in the **My Activity Stream** bar.
4. Enter the team's name in the **Visible to Team** field, or click **Select** to select it from the Teams list.
5. To post an external link, image, or YouTube video in the **My Activity Stream** dashlet, select **Link, YouTube,** or **Image** from the drop-down list under your name; enter the URL or path in the field displayed and Click **Post**.

   When you perform an action such as creating a contact or converting a lead, the information automatically displays in the **My Activity Stream** dashlet.

To view user pictures within posts

User profile pictures are displayed with user's posts in My Activity Stream. Demo user data has pictures as well. To add a picture to your profile, follow the steps listed below:

1. Click your username on the upper right hand corner of the page to go to your Edit user page.
2. Go to the **Picture** field in the **User Profile** tab and navigate to your picture file on your computer.
3. Click **Save**.

To reply to and delete posts

You can reply to posts that appear in **My Activity Stream** by clicking the **Reply** link. You can also delete posts in **My Activity Stream** by clicking the **Delete** link.

To filter by Only My Favorites

Follow the steps listed below to identify records as My Favorites :

1. Go to the List View of any module, for example **Opportunities**.
2. Click the grey star icon next to the record name to change its color to yellow. Repeat with other records if required.

Follow the steps listed below to run a search on My Favorites records:

1. Go to the List View of any module, for example **Opportunities**.
2. Mark the checkbox for **My Favorites** and click **Search**.

   This displays a list of all the records that had been identified as My Favorites earlier.

Merging Duplicate Records

You can merge duplicate records into a single record to update your data. You can select which fields you want to merge and when the process completes, the system deletes the duplicate records. This ensures that there is no confusion and that your users are accessing information from only one source. Before the duplicate records are deleted, related information such as activities, history, contacts are moved from the duplicate records to the primary record.

You can merge records in the following modules: Accounts, Contacts, Leads, Opportunities, Cases, and Bugs.

If you already know of the duplicate records that you want to merge, you can do it from the module's List View. If you need to search for duplicates of a record and then merge them, you can do so from the record's Detail View.

To merge duplicate records from the List View

1. Select two or more duplicate records on the module's home page, and click the **Merge** link from the **Actions** drop-down list.

   The **Merge Records** page displays fields from the primary record on the left and fields from the duplicate records on the right.

Note: The system treats the first record that you select as the primary record. However, you can change to a different record.

2. Click **Set as Primary** to specify one of the duplicate records as the primary record.

   This moves the record to the left column.
3. Click the << button to replace a field in the primary record with a field from a secondary record.
4. Click **Save Merge**.

   This merges the selected fields, moves all the related information to the primary record, and deletes the duplicate records.

To merge duplicates from the Detail View

1. Click a record in the List View to navigate to its Detail View.
2. Click **Find Duplicates**.

   This displays the **Find Search Records to Merge With** page.
3. Set filters in the **Find Search Records to Merge With** page to specify the field that you want to search for. For example, you can search for records that have the same billing address or phone number.
4. Select one or more filters and click **Next Step**; Click the Trash icon located next to the field name to remove a filter.

   This displays the Records Found To Merge With page.
5. Select the records that you want to merge and click **Perform Merge**.

   This displays the **Merge Records** page.
6. Merge records as described in **To merge duplicate records from the List View**.

Searching for Information in Sugar

You can search for information across Sugar or restrict it to a specific module. Sugar offers the following Search types:

- Global Search
- Basic Search
- Advanced Search

Global Search

You can perform a global search on all the modules enabled for global search by the system administrator. You can also add or remove modules enabled by the administrator to search on. For more information, see **To add or remove modules from Global Search**.

Administrators can select the modules that users can search on when using Global Search. This includes both standard and custom modules that have been deployed in Sugar. For more information, see **To Enable/Disable modules for Global Search**.

Global Search looks for one field at a time. For **Contacts**, you can enter the first name, last name, or the full name in the **Search** field. You can also enter a letter to find all records whose names contain that letter. For example, if you enter "a", Sugar will search for all records that start with the letter "a".

Global Search may or may not be case-sensitive depending on your database configuration. In general, Global Search on Sugar installations running on the MySQL database is not case-sensitive; Global Searchon Sugar installations running on Oracle is case-sensitive.

Enter a letter or a keyword in the **Search** field and click **Enter** or **Search** icon to perform a Global Search.

Sugar appends the % wildcard character when searching text fields. For example, searching for "Acme" will match **Account** names such as Acme Industries or Acme Funds. Searching for "%Acme" will also match account names such as ABC Acme Industries.

The search result lists records for the module from which you perform the search at the top of the list, followed by records from other modules. For example, if you perform a global search from the **Opportunities** module, matching opportunities are listed first.

Click the **Show All** link that displays at the bottom of the Search result list to view the full search results from each module in separate panels.

To add or remove modules from Global Search

1. Click the **Search** button located next to the Global Search field.

   This displays a page with the message: There were no results found. Please search again.
2. Click the **Advanced** link next to the **Search** button on this page.

3. Drag and drop module names between the Enabled Modules and Disabled Modules columns to add or remove modules from Global Search.

Basic Search

You can perform a basic search based on record name from the Search form in the List View of most modules.

- To perform a basic search, enter the record name, or the first letter of the name in the Search field and click **Search**. When searching for contacts, you can enter the first name, last name, or full name.
- To find only records assigned to you, select **My items**, and then click **Search**.
- To find only records that you have marked as your favorites, select **My Favorites**.
- Click **Clear** to clear the search filters.

To edit or delete records in the search results, see **To edit or delete multiple records**.

Advanced Search

Click **Advanced Search** for more filtering options in your search results. The search fields are context-sensitive and will vary depending on the module you are searching.

Text entered in search fields needs to match from the beginning of the value stored in each record, unless the wildcard character is prepended. Only records that match the selected fields are included in the filtered list if text is entered in more than one search field. For example, searching for “fred*” would only match first names like “Fred*erick” or other “Fred” names containing the asterisk (*) character.

Note: Numeric search strings match anywhere in a field. All matching records are displayed in a series of paginated lists.

Advanced Search also provides the option to save search criteria and related search results as Saved Search.

Saving Search Criteria and Layout

Saved Search and Layout option enables you to specify information you want to find and the layout of the search results. You can save the search results in the specified layout for future use. For example, you can view or hide details such as the record name, assigned user, and assigned team in the search results. You can also sort the results in ascending or descending order.

You can save an unlimited number of search results. The **Saved Searches** drop-down list displays the last saved search at the top of the list.

To save and manage search criteria

1. Enter a name for the search results in the **Save this search as** field and click **Save**.

   This displays the name in the **Saved Searches** drop-down list.

2. Select a saved search from the **Saved Searches** drop-down list in the module’s home page to view a saved search.

3. Select the saved search from the drop-down list, change the criteria as needed in the fields above, and click **Update** to modify a saved search.
4. Select a saved search in the **Saved Searches** drop-down list, click **Delete,** and **OK** to delete a saved search.
5. Select a cloumn from the **Hide Columns** list and use the left arrow to move it to the **Display Columns** list to add a column to the List View.
6. Select a column from the **Display Columns** list and use the right arrow to move it to the **Hide** Columns list to remove a column from List View.
7. Use the Mass Update sub-panel to edit or delete multiple records in the search results. For more information, see **To edit or delete multiple records**.

Home Module

When you log into Sugar, you will see your Home page. Tabs for other modules display alongside the Home tab. Other users do not have access to your Home page.

The Home page displays a collection of Sugar Dashlets that display information related to your activities such as meetings and calls. It also displays records assigned to you, such as Accounts, Opportunities, and Cases. Sugar Dashlets are user-configurable panels that you can add, remove, and move as needed. For more information, see Managing Sugar Dashlets.

The Home module displays the following tabs:

- **My Sugar**: This tab displays the following list of your customer-related tasks and activities:
  - **My Calls**. Lists phone calls set up by you or includes you, including the subject of the call, the duration, and the start date.
  - **My Meetings**. Lists invitations to meetings set up by you or others including the subject of the call, the duration, and the start date.
  - **My Leads**. Displays a list of leads that you created, including the name, business phone number, and date created.
  - **My Top Open Opportunities**. Lists the top five opportunities sorted by the amount. Opportunities with a status of Closed-Lost or Closed-Won are not included. You can display up to ten opportunities in this dashlet.
  - **My Accounts**. Displays accounts assigned to you, including the account and phone numbers.
  - **My Open Cases**. Displays a list of customer issues assigned to you for resolution, including the case number, subject, priority, and status.
  - **My Activity Stream**. Notifies you when other and team members create a new contact, lead, opportunity, or case. You can also view Twitter and FaceBook feeds of your friends in this dashlet.
  - **My Emails**. Lists your unread emails that were imported into Sugar from external email accounts.
- **Sales**: This tab displays pre-defined sales report charts. For example, **My Pipeline** displays a chart of your sales opportunities based on the cumulative amounts for selected sales stages. This chart, based on a Sugar pre-defined report, displays only when the expected close date is within the specified date range. Click the **Edit** icon on the dashlet menu bar to modify the chart title, chart type, sales stage, or time period. The updated information is displayed in the pipeline chart. Click the **Refresh** icon to refresh the view after an update.

- **Marketing**: This tab displays pre-defined marketing report charts. For example, **Leads by Lead Source** displays various sources of your leads to sales prospects, such as cold calls, trade shows, email campaigns, and so on.
- **Support**. This tab displays pre-defined support-related report charts. For example, **Open Cases by Month** displays how many new cases have been filed in the current month. **Open Cases by User by Status** groups cases as new cases, assigned cases, and pending input for each assigned user.
- **Tracker**: This tab displays pre-defined reports that you can use to track your actions as well as actions of those who report to you. When you select a report from the drop-down list, the report results display below if the relevant data exists in the system. For more information, see **Viewing and Creating Tracker Reports**.

Viewing and managing predefined charts

A chart is a graphical display of a report. You can add charts based on custom and predefined reports on your Home page. When a report is updated, the chart is automatically updated as well.

All charts are displayed as a collection of Sugar Dashlets. You can configure their appearance to suit your requirements. For example, you can change their titles and display or hide columns. You can always revert to the default settings, if needed.

Sugar provides several charts based on predefined reports. You can use these charts to view sales and opportunities for your organization. Each distinctively colored area on a chart is linked to the data set that it represents. You can click any colored area to drill down to the underlying data.

You can edit predefined charts to suit your requirements, but you cannot delete them. Click the **Edit** icon to modify a chart. Click the **Refresh** icon to refresh the view after an update. Click the **Refresh** icon above the chart to recalculate the data source for a specific chart.

The following predefined charts are displayed on your Home page:

- **All Opportunities by Lead Source by Outcome**. This is a horizontal stacked bar chart that displays total opportunities for each lead source. Each bar is made up of multi-colored segments that represent the outcome proportions for that lead source.
- **All Opportunities by Lead Source**. This is a pie chart that groups total sales opportunities by each lead source.
- **Campaign ROI**. This is a bar chart that displays the return on investment (ROI) for a campaign.
- **Modules used by Team Members (Last 30 Days)**. This is a bar chart that displays modules used most by members of your team in the last 30 days.
- **My Closed Won Opportunities**. This is a gauge chart that displays your closed won opportunities. The gauge size matches the total number of opportunities assigned to you. The position of the line on the gauge and the number displayed inside the gauge matches the total number of opportunities assigned to you with

the **Sales Stage** set to Closed Won. The gauge is divided into four ranges that are automatically calculated to be about equal size.

- **My Forecasting**. This is a bar chart that compares your quarterly quota with your committed forecast and your closed won opportunities.
- **My Modules Used (Last 30 Days)**. This is a bar chart that displays the modules you used the most in the past 30 days.
- **My Pipeline By Sales Stage**. This is a funnel chart that displays the total dollar amounts for all your opportunities grouped by sales stage. This chart displays only when the expected close date is within the specified date range.
- **Pipeline By Sales Stage**. This is a funnel chart that displays the total dollar amounts for all your opportunities grouped by sales stage.
- **Outcome by Month**. This is a vertical stacked bar chart in which each bar displays the total sales pipeline for each month. Each bar is made up of multi-colored segments that represent the outcome proportions for the pipeline in that month.

The Sales page also displays the following charts:

- **Leads By Lead Source**. This is a horizontal stacked bar chart where each bar shows the value of potential sales at each stage of the sales pipeline.
- **Opportunities by Lead Source**. This is a horizontal chart of that displays the proportion of total sales opportunities for each lead source.
- **Add Page**. The Add Page option allows you to add additional tabs to your Home page. Each tab is a new page that you can add to reorganize your Home page and display some Sugar Dashlets on separate pages.

Modifying the Home module

You can edit the Home page to rename page tabs, change the Home page layout, and add new Sugar Dashlets. For more information on adding Sugar Dashlets, see Managing Sugar Dashlets.

You can add new pages to the Home page if you need space to accommodate more Sugar Dashlets. These pages display as additional tabs next to the My Sugar tab.

Note the following restrictions when adding new pages:

- Maximum of ten pages are allowed on the Home module
- Maximun of three columns on a page are allowed
- Page names cannot be duplicated
- Page names cannot be more than 25 characters long

You can revert to the default Home module setup at any time by clicking **Reset Homepage** in your **User Settings**.

To customize the Home module

1. Click the title bar of a dashlet, and drag and drop it in a different location on the **Home** page to rearrange the dashlet location on your Home page.

2. Follow the steps listed below to rename the **My Sugar** tab:
   a. Double-click the tab name.

      The tab label changes to a text field.
   b. Enter a new name in the text field and click outside the field to display it.
3. Click the **Add Sugar Dashlets** link to add a Sugar Dashlet. For more information, see Managing Sugar Dashlets.
4. Follow the steps listed below to change the number of columns in the page layout:
   a. Click the **Change Layout** link on your Home page.

      This displays the **Change Layout** pop-up box.
   b. Select the number of columns you want displayed on the page.

      This reformats your Home page layout and displays existing information within the number of specified columns.

To add and manage new pages

1. Click the Add Page link indicated by a plus sign (+) located to the right of the **Home** page tabs.

   This displays the **Add Page** pop-up box.
2. Enter a name for the page, select the number of columns you want on the page, and click **Submit**.

   The new page tab is added to the Home page and the new page displays on the screen.

To revert to default Home page settings

1. Click your name located at the top right-hand corner of the page.

   This displays your Edit user page.
2. Click **Reset Homepage**, and **OK** in your Edit user page.

Leads Module

Leads are early contacts in the sales process. Use the Leads module to create, manage, and track sales leads or unqualified opportunities along with related activities, sales campaigns, and history.

You can associate a lead with any type of campaign to track the effectiveness of the campaign in generating opportunities for your organization.

Creating Leads

You can create Leads in Sugar and you can also import them into Sugar using a comma-delimited, tab-delimited, or custom delimited file. When you import Leads, you can select the default value for the Lead Source, such as Direct Mail, Trade Show, and so on from the drop-down list in the **Default Value** column.

Select **Import** from the **Leads** tab to import Leads. For more information on importing data, see Importing Data.

To create a lead

1. Select **Create Leads** from the **Actions** drop-down list on the **Leads** tab.

   Or, click the **Create** link in the far right corner of the List View or Detail View of any Leads page.

2. Enter the following information in the **Leads Overview** section:

   First Name. Enter the lead's first name.

   Last Name. Enter the lead's last name.

   Title. Enter the business title of the lead.

   Department. Enter the department to which the lead belongs.

   Account Name. Enter the name of the company related to the lead. When you convert the lead, you have the option to create the account as a related record.

   Office Phone. Enter the lead's office phone number.

   Mobile. Enter the lead's mobile phone number.

   Fax. Enter the lead's fax number.

   Website. Enter the website of the individual's organization.

   Primary and Other Address: Enter the primary address and **Other Address** information. To copy the other address from the primary address, select the **Copy address from left** checkbox.

If you select a lead from the Lead list, the system automatically enters the address. You can edit this information if needed.

Email Address: Enter the email address for the organization and your contacts and campaign targets within the organization. Select **Invalid** to indicate an incorrect email address. If you sent out campaign emails this contact and the individual chose to opt-out of receiving them, select **Opted Out**.

To add an additional email address, click the Add icon. You can add multiple email addresses.

Description: Enter a brief description for the lead.

Enter the following details in the **More Information** section:

Status. Select the status of the lead from the drop-down list. Standard status options are listed below. The administrator can change these to suit your organization's requirements:

- **New**: Unassigned, new lead.
- **Assigned**: Newly assigned to user.
- **In Process**: Currently active.
- **Converted**: The status appears as converted after the **Convert Lead** link has been selected. The system automatically changes the status in this field.

Note: Do not delete the Converted status from the drop-down list.

- **Recycled**: No opportunity at this time, lead should recycle to marketing for future follow-up.
- **Dead**: No opportunity and/or bad data.

Status Description. Enter a brief description for the lead status.

Opportunity Amount. Estimated amount of the sale.

Campaign. Enter the campaign name or click **Select** to select it from the **Campaigns** list to associate the lead with a campaign.

Lead Source. Select the origins of the lead such as **Trade Show** or **Direct Mail** from the drop-down list.

Lead Source Description. Enter a brief description of the lead source.

Referred by. Enter relevant information in this field if someone referred the lead to you.

Do Not Call. Check this box to add the lead's name to the **Do Not Call** list. This is to ensure that the lead is not contacted through the phone during campaigns.

Specify the following information in the **Other** section:

Teams. Enter the name of the new primary team to change the primary team assignment.

Click **Select (**arrow pointing diagonally to the left icon**)**, and choose the team from the Team List, or click **Add** to add team fields and enter the team names to assign additional teams to the record. For more information on teams, see Assigning Records to Users and Teams.

Assigned to. Enter the name of the individual who is assigned to the record, or click **Select** to choose from the User List. By default, this is assigned to you.

3. Click **Save**.

   This displays the lead's Detail View. You can create activities, attach notes, and view past marketing activities, including a list of campaigns, if any, that were sent out to the lead in the Lead's Detail View.

Managing Lead Information

Managing leads includes tasks such as importing and exporting leads, and tracking them through their lifecycle.

To manage leads

- Use the Search sub-panel on the Leads Home page to search for a lead. For more information, see Searching for Information in Sugar.
- Follow the steps listed below to add one or more leads to a campaign Target List:
  a. Select one or more leads in the Leads List View.
  b. Click **Add To Target List** from the **Actions** drop-down list.
     This opens the **Target Lists Search** page.
  c. Select the Target List from the **Target Lists Search** page.
- For information on how to import and export leads through vCards, see Using vCards to Import and Export Contacts.
- Select the data source from the lead's Detail View to pull in data from external data sources such as LinkedIn. For more information on data sources, see Integrating data from external sources.
- Select **Import** from the **Actions** drop-down liston the Leads List View page to import records. For more information on importing data, see Importing Data. For information on how to import Leads from vCards, see Using vCards to Import and Export Contacts.
- Select records from the List View, click the **Export** link from the **Actions** drop-down list to to export records. For more information, see Exporting Data.
- Select duplicate records from the List View, click the **Merge Duplicates** link to merge duplicate records. For more information see To merge duplicate records from the List View.
- Click the **View Change Log** link in the Detail View of a Lead record to track changes in the lead information over time.
- Select multiple records in the Leads List View, click the Mass Update link in the **Actions** drop-down list to edit or delete information related to multiple leads. For more information, see To edit or delete multiple records.
- Click on the lead name in the List View to display the Detail View of that lead record. The follow tasks can be performed from the Detail View page:
  - Click **Edit** to modify the record.

- Click **Manage Subscriptions** to manage newsletter subscriptions.

  Select the newsletter from the **Available NewsLetters** list and drag it to the **NewsLetters Subscribed To** list to add the lead to a newsletter subscription mailing list.

  Drag the newsletter from the **Newsletters Subscribed to** list to the **Available Newsletters list** to add the individual to a newsletter subscription mailing list, Click **Save** to update the information.
- Click **Duplicate** to duplicate a lead, on the detail page. This is a convenient way of creating a similar lead. You can change the information in the duplicate record to create the new lead.
- Cick **Delete** to delete a lead.
- For more information on how to view and edit related information in a sub-panel, see To manage related information in sub-panels.

- Follow the steps listed below to archive a related email:

  a. Scroll down to the **History** sub-panel where related emails are listed in the Detail View.

  b. Click **Archive Email.**

     This displays the **Create Archived Emails** form.

  c. Copy-paste information related to the email into the fields in the **Create Archived Emails** form and click **Save**.

Note: You can create Web-to-Lead forms for use in your web-based campaigns and other sources such as your website. This Lead information is saved in the Sugar database and can be used to generate opportunities for your organization. For more information, see Creating Web-to-Lead Forms.

Converting Leads

Sugar enables you to convert leads into contacts, opportunities, and accounts after you have evaluated and qualified them.

To convert a lead

1. Click **Convert Lead** on the Lead's Detail View page.

   This displays the **Convert Lead** page.

   The **Create Account** checkbox is pre-selected by the system to create a new account for the lead. You can also create other related records such as a note, task, and opportunity if the administrator has enabled you to do so.
2. Click the select arrow next to the Select Account fields to choose an account from the **Accounts** list and associate the lead with an existing account.
3. Select the appropriate checkbox to create a note, appointment, or opportunity.

   This displays fields to enter the information. For example, if you select the Create Opportunity checkbox, fields such as Opportunity Name, Opportunity Amount, and Expected Close Date display below.

4. Populate the mandatory and other fields and click **Save**.

   This creates a new contact, associates it with the related records and displays links to the new records. You can also view these records from the contact's Detail View page.

Contacts Module

Use the **Contacts** module to create and manage contacts for your organization.

A contact is any individual who is a valid sales lead; a lead that has been evaluated and assessed for a possible sales opportunity. You can associate a contact with any record such as an **Account**, **Opportunity**, or **Campaign**. Associating a contact with a campaign enables you to track the effectiveness of the campaign in generating opportunities for your organization.

The **Actions** drop-down list on the **Contacts** tab displays the following options:

Create Contact. Click this option to create a record for a new contact.

Create Contact From vCard. Click this option to import a vCard file from your local system.

View Contacts. Click this option to view a list of your existing contacts.

Contact Reports. Click this option to view an existing report on your contacts, or to create a new report.

Import Contacts. Click this option to import contact information from an external application or file. For more information, see To import data.

Creating Contacts

You can create contacts in Sugar and you can also import them into Sugar using a comma-delimited, tab-delimited, or custom delimited file.

To create a contact

1. Select **Create Contact** from the **Actions** drop-down list on the **Contacts** tab.

   Or, click the Create Contact icon in the Shortcuts Bar, and add additional information after you save the form.

   Or, click the Create icon on any page within the **Contacts** module.

2. Enter the following information in the **Contacts Overview** section:

   First Name. Enter the contact's first name.

   Last Name. Enter the contact's last name.

   Title. Enter the contact's business title.

   Picture. Click **Browse** to navigate to the image file location on your machine to upload the picture. Only image files with .jpg, .png, and .bmp extensions are accepted.

Office Phone. Enter the contact's office phone number.

Mobile. Enter the contact's mobile phone number.

Fax. Enter the contact's fax number.

Account Name. Enter the account name associated with the contact; or click **Select** to choose from the list of existing accounts.

Address: Enter the Primary Address and Other Address information. Select **Copy address from left** box to copy the Primary Address into the Other Address section.

If you select a contact from the Contact's list, the system automatically enters the address. You can edit this information if required. Similarly, if the contact is related to an account, Sugar automatically auto-fills this field with the account's primary address.

Email Address: Enter the email address for the organization and your contacts and campaign targets within the organization. Select **Invalid** to indicate an incorrect email address. If you sent out campaign emails this contact and the individual chose to opt-out of receiving them, select **Opted Out**.

To add an additional email address, click the Add icon. You can add multiple email addresses.

Description: Enter a brief description for the contact.

Enter the following details in the **More Information** section:

Reports To. Click **Select** and select the contact's supervisor from the Contacts list.

Lead Source. Select the source that generated the lead, such as direct mail or trade show from this drop-down list.

Campaign. Enter the campaign name or click **Select** to select it from the Campaigns list to associate the contact with a campaign.

Sync to Outlook. Select this box to synchronize this contact information with Outlook if you have installed the Sugar Plug-in for Microsoft Outlook.

Do Not Call. Select this box to add the contact to the Do Not Call list. This is to ensure that the contact is not targeted during campaigns.

Specify the following information in the **Other** section:

Teams. Enter the name of the new primary team to change the primary team assignment. Click **Select** to choose new teams from the Teams List, or click **Add** to add additional team fields and enter the team names. For more information on assigning teams, see Assigning Records to Users and Teams.

Assigned to. Select the individual who is responsible for communicating with this contact. You are assigned to the contact by default.

3. Click **Save** to save the record and view its detail page.

   Click **Cancel** to return to the Contact's home page without creating the new contact.

Managing Contacts

Managing contacts includes tasks such as editing, importing and exporting contact records.

To manage contacts

- To edit or delete information related to multiple contacts, select multiple records in the Contacts List View and click the Mass Update link in the **Actions** drop-down list. For more information, see Editing and Deleting Multiple Records.
- To add one or more contacts to a campaign target list, select them in the Contacts List View and click **Add to Target List** to select the list from the **Target Lists** pop-up window.
- To display the Detail View for a contact, click on the contact name in the List View.
- To edit contact information, click **Edit** in the Contact's Detail View.
- To archive a related email, scroll down to the **History** sub-panel in the Detail View where related emails are listed and click **Archive Email.** This displays the **Create Archived Email** form. Copy-paste information related to the email into this form to save it for your records.
- To pull in account data from data sources such as LinkedIn, select the data source from the contact's Detail View. For more information on data sources, see Integrating data from external sources.
- To import records, select **Import** from the **Actions** drop-down listof the Contacts tab. For more information on importing data, see Importing Data.
- To export records, select the records from the Contacts List View, click **Export** from the **Actions** drop-down listand follow the process described in Exporting Data.
- To merge duplicates, select the records from the Contacts List View, click **Merge** from the **Actions** drop-down list, and follow the process described in Merging Duplicate Records.
- To manage newsletter subscriptions, click **Manage Subscriptions** on the Contact Detail View. To add the individual to a newsletter subscription mailing list, select the newsletter from the **Available/NewsLetters Unsubscribed to** list and drag it to the **NewsLetters Subscribed To** list. To remove the individual from the mailing list of a newsletter, drag the newsletter from the **Newsletters Subscribed to** list to the **Available/NewsLetters Unsubscribed to** list. Click **Save** to update the information.
- To duplicate contact information, click **Duplicate** in the Contact Detail View.

  Duplication is a convenient way of creating a similar contact. You can change the information in the duplicate record to create a new contact.
- To track changes made to contact information over time, click the **View Change Log** link located in the Detail View.
- To manage records in a sub-panel, see To manage related information in sub-panels.

Using vCards to Import and Export Contacts

vCards are electronic business cards that are exchanged through applications such as email and web browsers. You can view and create a vCard file from the record's Detail View. You can save it to your local machine to import it to other applications.

When you create contacts in Sugar, or import them from another application, the system automatically creates a vCard for it. You can also create a vCard file from the record's Detail View and save it in Outlook, or on your local machine.

To import a vCard

1. Select **Create from vCard** from the **Actions** drop-down listof the Contacts module tab.

   This displays the Import vCard page.
2. Click **Browse** to navigate to the vCard location on the local file system.
3. Select the file from your local machine and click **Import vCard**.

   This displays the Detail View page of the created contact.
4. Click the **vCard** icon located to the right of the contact Name in the contact's Detail View to open the vCard and edit the information.

To edit or to save a vCard to a different location

1. Click the **vCard** icon located next to the contact's name in the contact's Detail View.

   This displays a dialog box prompting you to open or save the file.
2. To edit the vCard and save it in your Contacts folder in Outlook, open the file, make the necessary changes and click Save; to save the vCard on your local machine, select **Save As**.

Accounts Module

Use the Accounts module to create and manage customer accounts for your organization.

An account contains your customer information such as name and address. Each account can be associated with other records such as opportunities and contacts.

The **Actions** drop-down list on the **Accounts** tab displays the following options:

Create Account. Click this option to create a new account.

Accounts. Click this option to view a list of existing accounts.

Account Reports. Click this option to view or create reports on existing accounts.

Import. Click this option to import account information from external systems and data sources. For more information, see To import account data.

Creating Accounts

You can create accounts in Sugar, or you can import them into Sugar using a comma-delimited, tab-delimited, or custom delimited file.

To create an account

1. Select **Create Contact** from the **Actions** drop-down list on the **Contacts** tab.

   Or, click the **Create Contact** icon in the Shortcuts Bar, and add additional information after you save the form.

   Or, click the Create icon on any page within the **Contacts** module.

2. Enter the following information In the **Account Overview** section:

   Account Name. Enter a name for the account.

   Website. Enter the URL for the organization's website.

   Office Phone. Enter the office phone number.

   Fax. Enter the fax number for the organization.

   Address. Enter the billing and shipping addresses. To copy the Billing Address to the Shipping Address section, select the **Copy address from left** checkbox.

   Email Address: Enter the primary email address for the account. To add additional email addresses for your contacts and campaign targets within the organization, click the **Add** icon. To indicate the primary email address, select **Primary**. If you sent campaign emails to this contact and the individual chose to opt-out of receiving them, select **Opted Out**. If the email is incorrect, select **Invalid**.

Description: Enter a brief description for the lead.

Enter the following information in the **More Information** section:

Type. Enter the account category such as Customer or Partner.

Annual Revenue. Enter the annual revenue for the organization.

SIC Code. Enter the Standard Industrial Classification code that indicates your organization's type of business.

Member of. Enter the names of organizations associated with the account.

Campaign. To target the account for a marketing campaign, click **Select** and choose an existing campaign.

Industry. From this drop-down list, select the industrial sector to which the account belongs.

Employees. Enter the number of employees in the organization.

Ticker Symbol. Enter the stock ticker symbol for the organization.

Ownership. Specify the owner information.

Rating. Enter the organization's rating in the industry.

Specify the following information in the **Other** section:

Teams. Assign one or more teams to manage the record. By default, your private team is assigned as the primary team. To change the primary team assignment, enter the name of the new primary team. To assign additional teams to the record, click **Select** and choose new teams from the Teams List, or click **Add** to add additional team fields and enter the team names. For more information on assigning teams, see Assigning Records to Users and Teams.

Assigned to. Enter the name of the individual you want to assign to the account or click **Select** to choose from the User List. By default, this record is assigned to you.

3. Click **Save** to save the new account information; click **Cancel** to exit the page without saving the information.

Managing Accounts

Managing accounts includes tasks such as adding, editing, and deleting accounts.

To view and manage accounts

- To sort the Accounts List View, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To edit or delete information related to multiple accounts, select multiple records in the Accounts List View and click the **Mass Update** link in the **Actions** drop-down list. For more information, see To edit or delete multiple records.
- To import records, select **Import Accounts** from the **Actions** drop-down list on the Accounts tab. For more information on importing data, see Importing Data.

- To export records, select the records from the **Accounts** List View, click the **Export** link in the **Actions** drop-down list and follow the process described in Exporting Data.
- To add one or more accounts to a campaign target list, select them in the List View, click **Add to Target List** in the **Actions** drop-down list, and select the list from the **Target Lists** pop-up box.
- To view account information, click the record's name in the List View. This displays sub-panels for related records such as Activities, History, Contacts, Opportunities, and Leads on the Detail View. You can create new records or edit existing ones.
- To edit an account, click **Edit** on the Detail View page, make the necessary changes, and click **Save**.
- To pull in data from data sources such as LinkedIn, select the data source from the account's Detail View. For more information on data services, see Integrating data from external sources.
- To merge duplicates, select the records from the **Accounts** List View, click the **Merge** link in the **Actions** drop-down list, and follow the process described in Merging Duplicate Records.
- To archive a related email, scroll down to the **History** sub-panel in the Detail View where related emails are listed and click **Archive Email**. This displays the **Create Archived Email** form. Copy-paste information related to the email into this form to save it for your records.
- To copy the account's billing or shipping address to the associated contact records, in the Edit View, click the **Copy** button, select one or more contacts and click **Copy Address to Checked Contacts**.
- To duplicate an account, click **Duplicate** on the Detail View page and click **Save**.

  This duplicates the account and displays its Detail View page. Duplication is a convenient way of creating a similar account. You can change the information in the duplicate record to create a new account.
- To delete the account, click **Delete** on the Detail View page.
- To track changes in the account record, click **View Change Log** on the account's Detail View page.
- To view or manage related records in a sub-panel, see To manage related information in sub-panels.

Opportunities Module

Use the Opportunities module to create and manage sales opportunities, qualified leads, and view related records.

An opportunity specifies the estimated amount of a sales deal and is tied to a sales stage. A sales stage, such as Qualification, Closed Won, or Closed Lost identifies how close you are to making the sale. The administrator defines and sets the sales stage depending upon the requirements in your organization. The estimated amount can vary depending on the sales stage.

Based on the sales stage, the system calculates the probability of a sale. For example, at the Proposal sales stage, the system calculates the probability as 65%, and at the Negotiation sales stage, probability increases to 80%. These numbers are used to forecast sales for a specified time period. For more information, see Forecasts Module.

The following are the default sales stages in Sugar:

Prospecting. This is the first stage in the sales process and indicates that the opportunity with this prospect is new and needs to be qualified by a sales representative.

Qualification. The sales representative is currently interacting with the prospect to determine if a sales opportunity exists.

Needs Analysis. The sales representative uncovers the prospect's business problems (having determined that the prospect is interested in the products or services).

Value Proposition. The sales representative maps the company's products and/or services to the prospect's business problems and describes the value of the solution (having uncovered the prospect's business problems).

Id. Decision Makers. The sales representative identifies the decision makers necessary to close this opportunity (having determined that there is a match between the prospect's business problems and the company's products and/or services).

Perception Analysis. The sales representative analyzes the prospect's perceived value of the company's solution to prepare the appropriate combination of products and services for a sales quote.

Proposal/Price Quote. The sales representative delivers the proposal or price quote to the prospect.

Negotiation/Review. The sales representative reviews and negotiates the proposal with the prospect.

Closed Won. The sales representative has won this opportunity and the company can now bill the customer.

Closed Lost. The sales representative has lost this opportunity.

Every opportunity must be associated with an account. You can associate an opportunity with only one account but you can associate it with multiple leads and contacts.

You can associate an opportunity with a campaign to track the campaign's effectiveness in generating opportunities for your organization. Any campaign-related opportunity that generates revenue is reflected in the campaign's ROI (Return on Investment) chart. For more information, see Viewing a Campaign's Return on Investment.

Note: You can associate an opportunity with only one campaign.

Creating Opportunities

You can create opportunities in Sugar, or you can import them into Sugar using a comma-delimited, tab-delimited, or custom delimited file. You can create an opportunity not only from the **Opportunities** module, but also from the Convert Lead page, and from the Detail View of Accounts, Contacts, or Quotes.

To create an opportunity

1. Click **Create Opportunity** from the **Actions** drop-down list on the **Opportunities** tab.

   Or, click the **Create Opportunity** icon in the Shortcuts Bar, and add additional information after you save the form.

   Or, click the Create icon on any page within the **Opportunity** module.

2. Enter the following information in the **Create** (Opportunity) page:

   Opportunity Name. Enter a name for the opportunity.

   Account Name. Enter the name of the account related to the opportunity. To choose from the list of existing accounts, click **Select**.

   Currency. Select the currency used from the drop-down list.

   Expected Close Date. The expected or estimated close date for this particular opportunity.

   Opportunity Amount. Enter the estimated amount of the sale.

   Type. Use this drop-down list to specify whether the opportunity is from an existing customer or a potential customer.

   Sales Stage. Specify the current status of this opportunity from the drop-down list. The value specified for the **Sales Stage** determines the default value displayed in the **Probability** field on the **Opportunity** page.

   Lead Source. Use this drop-down list to specify the lead source such as Trade Show or Cold Call.

Probability (%). Sugar determines the values for this field based on the selected **Sales Stage** value. For example, if the **Sales Stage** value is Closed/ Won, then the probability changes to 100%. You can manually change the Probability% value.

Campaign. To associate an opportunity with a campaign, enter the campaign name or click **Select** to select it from the **Campaigns** list.

Next Step. Enter the next step in closing a sale.

Description. Enter a brief description of the opportunity.

Specify the following information in the **Other** section:

Team. To change the primary team assignment, enter the name of the new primary team. To assign additional teams to the record, click **Select**, and choose the team from the Team List, or click **Add** to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.

Assigned to. Enter the name of the individual you want to assign to the record or click **Select** to choose from the User List. By default, this record is assigned to you.

3. Click **Save** to create the new opportunity; click **Cancel** to return to the Opportunity home page without saving the information.

   The opportunity is now listed not only on the Opportunities home page but is also listed in the Forecasts worksheet under the appropriate time period. For more information on forecasts, see Forecasts Module.

Managing Opportunities

Managing opportunities includes tasks such as editing, deleting, importing, and exporting records.

To manage opportunities

- To sort a list view, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To edit or delete information related to multiple opportunities, select multiple records in the Opportunities List View and click the **Mass Update** link in the **Actions** drop-down list. For more information, see To edit or delete multiple records.
- To import records, select **Import Opportunities** from the **Actions** drop-down list on the **Opportunities** tab. For more information on importing data, see Importing Data.
- To export records, select the records from the Opportunities List View, click **Export** in the **Actions** drop-down list and follow the process described in Exporting Data.
- To merge duplicates, select the records from the Opportunities List View, click **Merge** in the **Actions** drop-down list and following the process described in To merge duplicate records from the List View.

- To view the details of an opportunity, click the opportunity name in the List View.
- To edit the details, on the detail page, click **Edit**.
- To duplicate an opportunity, click **Duplicate** on the Detail View page. Duplication is a convenient way of creating a similar opportunity. You can change the information in the duplicate record to create a new opportunity.
- To delete an opportunity, click **Delete** on the Detail View page.
- To track changes to an opportunity over time, click the **View Change Log** tab on the Detail View of the page.
- To view and manage related records in a sub-panel, see To manage related information in sub-panels.
- To archive a related email, scroll down to the **History** sub-panel in the Detail View and click **Archive Email.** This displays the **Create Archived Emails** page. Copy-paste information related to the email into the **Create Archived Emails** page and save it for your records.
- To view or create an opportunity report, click **Opportunities Report**. For information on viewing and creating reports, see Reports Module.

Calendar Module

The Calendar Module has been introduced as a separate module in Release 6.2.0 to allow for ease of use and access. Use the Calendar module to schedule and manage activities such as calls, meetings, and tasks.

The **Actions** drop-down list on the **Calendar** tab displays the following options:

Log Call. Click this option to schedule a call as described in Scheduling Calls

Schedule Meeting. Click this option to schedule a meeting as described in Scheduling Meetings.

Create Task. Click this option to create a task as described in Creating Tasks.

View Calendar. Click this option to view your calendar in different formats and to view other user's calendars as described below.

Using the Calendar

To view your calendar by day, week, month or year, click the appropriate button at the top left of the main screen. Planned activities are displayed along with associated dates, in each format. Sugar enables you to click any activity on your calendar to edit the information.

You can move backwards and forwards in the calendar- by one day, week, month or year. In the week, month or year format, you can click on any date to view it in day format.

You can create a related note or attachment for any scheduled call or meeting. For example, you can add a note summarizing the outcome of a call or a meeting.

In Day format, the calendar lists the hours of the day vertically. You can view a list of existing tasks on the right side of the main calendar body. To view the details of a task, click its subject title.

When you save the information, the system displays the detail page where you can view and manage related information such as contacts and notes.

Viewing Shared Calendars

Users can view each other's calendar in order to schedule appointments. The information that you can view in another user's calendar depends on your team membership. For example, if you have an appointment on your calendar that is assigned to the Global team, all users in your organization will be able to access the appointment details when they view your calendar. However, if the appointment is assigned to your private team, they will only be able to see whether you are free or busy but will not be able to view the details. If the appointment is assigned to the East team, then only members of that team can view its details.

Managers have permissions to view, edit, and delete their subordinates' appointments. Subordinates can only view their Manager's appointments as free/busy time. Administrators have full access to any user's calendar and the permissions to edit, duplicate, and delete any appointment.

To view shared calendars

1. Click **Shared** on the Calendar home page.

   The page displays the **Shared Calendar** page.

2. To view a user's calendar, click the **Edit** icon.

   This displays a drop-down list of users and a drop-down list of teams.

3. To view users who belong to a specific team, select the team from the drop-down list.

4. Choose a user and click **Select**.

   This displays the selected user's calendar.

Calls Module

The Calls Module has been introduced as a separate module in Release 6.2.0 to allow for ease of use and access. Use the Calls module to log, view, and import calls.

The **Actions** drop-down list on the Calls tab displays the following options:

Log Call. Click this option to record the details of a call as described in Scheduling Calls.

View Calls. Click this option to view and manage calls as described in To manage calls.

Import Calls. Click this option to import external data into a note as described in Importing Data.

Scheduling Calls

You can schedule calls with users, contacts, and leads. Scheduling a call in Sugar enables you to create a record of the call along with information regarding the subject of discussion, the participants, the time period, and the status. After you save this information, you can send out an invitation to all the participants immediately or at a later date. You can create a note or add attachments before or after a call occurs. After you complete a call, or if you cancel it for any reason, you can update its status.

When you create the call, the **Calls** page displays the following sub-panels:

Scheduling. The Scheduling sub-panel displays details such as the name of the attendees, the day, and the time of the call. If other calls are already scheduled, the busy time is blocked out and colored blue. If there are scheduling conflicts, the busy time displays as a brown block.

Add Invitees. You can use the Add Invitees sub-panel to find users that you want to invite as described in To add invitees.

To schedule a call

1. Select **Log Call** from the **Actions** drop-down list of the **Calls** tab.
2. Enter information in the following fields:

   Subject. Enter the subject of discussion.

   Start Date & Time. Click the **Calendar** icon and select the date or input the data manually. Select the time, in hours and minutes, from the adjoining drop-down lists.

   Status. Select one of the following from the drop-down lists:

Inbound. Choose this option if it is an inbound call.

Outbound. Choose this option if it is an outbound call.

Planned. Choose this option if the call is scheduled to take place.

Held. Change the status from **Planned** to **Held** after a call is completed.

Not Held. Change the status from Planned to Not Held if a call did not occur for any reason.

Related to. Enter or select the name of the related record such as an account, opportunity or contact from this drop-down list.

When you type a character in the field, the system performs a quick search of possible values and presents a list of values starting with that character. Typing additional characters restricts the search results. When searching for a name, Sugar respects the Name Display Format setting on the User Preferences page. If the setting specifies "s f l" (Salutation First Last), then Sugar displays a list of first names that start with the specified character. For example, if you enter "A", the system displays first names starting with "A". Similarly, if the Name display format specifies "s l f", then the system displays last names starting with "A".

Duration. Enter the number of hours in the adjoining box and select the number of minutes from the drop-down list.

Reminder. Select this box and specify the time from the drop-down list to send a reminder when a call is due. The system will send a reminder to all participants at the specified time.

If you set a default time for reminders on your User Preferences page, Sugar will implement it when you do not set a reminder during call creation. This default time displays in the Calls Detail View page and can be modified in the Edit View page.

Description. Enter a brief description of the purpose of the call.

Assigned to. Specify the user who is assigned to the record. By default, it is assigned to you. To assign a different user, click **Select** to select from the Users list.

Teams. To change the primary team assignment, enter the name of the new primary team. To assign additional teams to the record, click **Select** to choose new teams from the Teams List, or click **Add** to add additional team fields and enter the team names in the fields.

Description. Enter a brief description of the purpose of the call.

Add Invitees. Enter names of the participants of the call as described in To add invitees.

3. Click **Save**.
4. Click **Send Invites** to send an invitation to the participants.
5. To create a copy of the call, click **Close and Create New**.

   This closes the original call and changes its status to **Held**. The new call retains all the information of the original record except for the status, which by default is set to **Planned**.

To add invitees

1. In the **Add Invitees** sub-panel of the Call Detail View page, enter all or any of the following information for a user, contact, or lead:

   First Name. You can add a letter, a whole name, or a partial name.

   Last Name. You can add a letter, a whole name, or a partial name

   Email. You can add a letter, a whole address, or a partial address.

2. Click **Search**.

   The system displays the search results below with an **Add** button next to each name on the list.

3. Click the appropriate **Add** button to send an invitation to the user.

   The list of invitees displays in the Scheduling sub-panel.

To manage calls

- To sort a List View, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To update information for some or all calls, use the **Mass Update** panel in the Actions drop-down list of the Calls List View as described in Editing and Deleting Multiple Records.
- To import a list of calls, select **Import Calls** from the **Actions** drop-down list of the **Calls** tab. For more information on importing data, see Importing Data.
- To view the details of a call, click its Subject on the Calls List View.
- To edit a call, click **Edit** on the call's Detail View page, revise the information and click **Save**. Associated information such as **Contacts**, **Users**, **Leads**, and **Notes** are displayed in sub-panels.
- To duplicate a call, click **Duplicate** in the call's Detail View page. Duplication is a convenient way of creating a similar activity. You can change the information in the duplicate record to create a new activity.
- To delete a call, click **Delete** on the call's Detail View page**,** and then click **OK**.
- To find a specific call in the list, enter the subject or the contact name in the **Search** sub-panel above and click **Search**. To search only your records, select the **My items** checkbox.
- To perform an advanced search with additional search filters such as related record, click **Advanced**.
- To edit a related record, click the **Edit** icon for the related record in the sub-panel of the Detail View, make the changes, and click **Save**.
- To remove an association with another record, scroll down to the related record in the call's Detail View, click the **rem** icon, and then click **OK**.

Meetings Module

The **Meetings** Module has been introduced as a separate module in Release 6.2.0 to allow for ease of use and access. Use this module to schedule, view, and manage meetings.

The **Actions** drop-down list on the **Meetings** tab displays the following options:

Schedule Meeting. Click this option to schedule a meeting as described in Scheduling Meetings.

View Meetings. Click this option to view and manage meetings as described in To manage meetings.

Import Meetings. Click this option to import external data as described in Importing Data.

Scheduling Meetings

You can schedule meetings with users, contacts, and leads. When you schedule a call or a meeting, you are creating a record with information regarding the subject of discussion, the participants, the time period, and the status. After you save this information, you can send out an invitation to all the participants immediately or at a later date. You can create a note or add attachments before or after a meeting occurs. After you complete meeting, or if you cancel it for any reason, you can update its status.

The **Create** (Meetings) page displays the following sub-panels:

Scheduling. The **Scheduling** sub-panel displays details such as the name of the attendees, the day, and the time of the meeting. If other meetings are already scheduled, the busy time is blocked out and colored blue. If there are scheduling conflicts, the busy time displays as a brown block.

Add Invitees. Use the **Add Invitees** sub-panel to find users that you want to invite as described in To add invitees.

To schedule a meeting

1. Select **Schedule Meeting** from the **Actions** drop-down list of the **Meetings** tab.
2. Enter information in the following fields:

   Subject. Enter the subject of discussion.

   Status. Select one of the following from the drop-down lists:

      Planned. Choose this option if the meeting is scheduled to take place.

Held. Change the status from **Planned** to **Held** after the meeting is completed.

Not Held. Change the status from **Planned** to **Not Held** if the meeting did not occur for any reason.

Meeting Type. Select Sugar, GoToMeeting, or WebEx from this drop-down list to indicate the type of meeting. External Accounts like GoToMeeting and WebEx need to be activated by your administrator and added by you, for these to display in the Meeting Type drop-down list. For more information, see External Accounts.

Start Date. Click the **Calendar** icon and select the date or input the data manually. Select the time, in hours and minutes, from the adjoining drop-down lists.

Related to. Enter or select the name of the related record such as an account, opportunity or contact from this drop-down list.

When you type a character in the field, the system performs a quick search of possible values and presents a list of values starting with that character. Typing additional characters restricts the search results. When searching for a name, Sugar respects the Name Display Format setting on the User Preferences page. If the setting specifies "s f l" (Salutation First Last), then Sugar displays a list of first names that start with the specified character. For example, if you enter "A", the system displays first names starting with "A". Similarly, if the Name display format specifies "s l f", then the system displays last names starting with "A".

If you set a default time for reminders on your User Preferences page, Sugar will implement it in the event that you do not set a reminder when you create a call or meeting. The default time will display in the Detail View after you save the record. You can change it in the Edit View.

Duration. Enter the number of hours in the adjoining box and select the number of minutes from the drop-down list.

Location. Enter the meeting location.

Reminder. Select this box and specify the time from the drop-down list to send a reminder when a meeting is due. The system will send a reminder to all participants at the specified time.

If you set a default time for reminders on your User Preferences page, Sugar will implement it when you do not set a reminder during meeting creation. This default time displays in the Meeting Detail View page and can be modified in the Edit View page.

Description. Enter a brief description for the purpose of the meeting.

Assigned to. Specify the user who is assigned to the record. By default, it is assigned to you. To assign a different user, click **Select** to select from the Users list.

Teams. To change the primary team assignment, enter the name of the new primary team. To assign additional teams to the record, click **Select** to choose new teams from the Teams List, or click **Add** to add additional team fields and enter the team names in the fields.

Add Invitees. Enter names of the participants of the meeting as described in To add invitees.

3. Click **Save**.
4. Click **Send Invites** to send out an invitation to the participants.
5. To create a copy of the call or meeting, click **Close and Create New**.

   The system closes the original meeting and changes its status to **Held**. The new meeting retains all the information of the original record except for the status, which by default is set to **Planned**.

Note: For WebEx meetings, two invitations are sent to each meeting invitee - one sent by Sugar, the other sent by WebEx. For all other meeting types (IBM LotusLive, GoToMeeting and Sugar), only Sugar sends the meeting invitations.

To add invitees

1. Enter all or any of the following information for a user, contact, or lead in the **Add Invitees** sub-panel of the **Create** (Meeting) page:

   First Name. You can add a letter, a whole name, or a partial name.

   Last Name. You can add a letter, a whole name, or a partial name

   Email. You can add a letter, a whole address, or a partial address.
2. Click **Search**.

   The system displays the search results below with an **Add** button next to each name on the list.
3. Click the appropriate **Add** button to send an invitation to the user.

   The list of invitees displays in the Scheduling sub-panel.

To manage meetings

- To sort a List View, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To update information for some or all meetings, use the **Mass Update** panel in the **Actions** drop-down list of the Meetings List View as described in Editing and Deleting Multiple Records.
- To import a list of meetings, select **Import Meetings** from the **Actions** drop-down list of the **Meetings** tab. For more information on importing data, see Importing Data.
- To view the details of a meeting, click its Subject on the Meetings List View.
- To edit a meeting, click **Edit** on the meeting's Detail View page, revise the information and click **Save**. Associated information such as **Contacts**, **Users**, **Leads**, and **Notes** are displayed in sub-panels.
- To duplicate a meeting, click **Duplicate** in the meeting's Detail View page. Duplication is a convenient way of creating a similar activity. You can change the information in the duplicate record to create a new activity.

- To delete a meeting, click **Delete** on the meeting's Detail View page**,** and then click **OK**.
- To find a specific meeting in the list, enter the subject or the contact name in the **Search** sub-panel above and click **Search**. To search only your records, select the **My items** checkbox.
- To perform an advanced search with additional search filters such as related record, click **Advanced**.
- To edit a related record, click the **Edit** icon for the related record in the sub-panel of the Detail View, make the changes, and click **Save**.
- To remove an association with another record, scroll down to the related record in the meeting's Detail View, click the **rem** icon, and then click **OK**.

Emails Module

The Emails module enables you to manage your emails. You can use the Emails module for the following tasks:

- Compose and send emails
- View and process emails on external mail servers without downloading them into the Sugar database
- Import emails into the Sugar database for necessary action
- Associate an imported email with a related Sugar record such as a bug or an account to create a communication thread for future reference
- Create a related record, such as a bug, from an email
- Search for imported emails based on specific parameters

Options to check for incoming emails, compose emails, and configure mail settings display at the top of the Emails home page. The page is divided into panels: the left panel contains the Folders list and the Search field; the top half of the right panel lists emails, and the bottom half of the right panel displays the contents of the email that you select from the list above.

Configuring Email Settings

Settings in Emails enable you to manage how you view and compose emails. Some settings are pre-configured with default values. Other settings are optional. You can customize these settings to suit your requirements.

Sugar supports the IMAP protocol for viewing emails in your external mail accounts and for sending emails composed in Sugar. Using IMAP enables you to access IMAP folders selectively on the mail server in Sugar.

The Settings window displays tabs for General settings and for Mail Account settings.

General Settings

The General Settings tab (within the Settings tab) displays options to specify the character set, signature, automatic/manual checks for incoming emails and so on. Some of these settings have default values which you can modify. General Settings apply to all your personal mail accounts in Sugar.

To specify general settings

1. Click the **Settings** tab at the top of the page.

   This opens the **Settings** pop-up box.

2. Enter values for any of the following fields in the Settings pop-up box:

   Check for New Mail. If you want the system to check your mail accounts automatically for new emails, select a time interval from the drop-down list. The default setting is to check emails manually.

   Send Plain Text Emails Only. Check this box to send emails in plain text format instead of the default HTML format.

   Character Set: Specify the default character set for outbound emails from this drop-down list.

   Signatures. Select an existing signature for your outbound emails from this drop-down lists. To create a signature, click **Create** located next to the Signature field, enter a name for the signature, input text for the signature and click **Save**. To use a signature image file located on a hosted website, click the Insert Image icon on the HTML toolbar, and enter the URL.

   Signature above reply. Select this box to place your signature above the content of the email to which you are responding.

   Emails per Page. Specify the number of emails that you want displayed per page in the pane containing the email list. The email list is paginated to enable you to view the specified number of emails within each page.

   Folder Management. This section displays sub-folders in the My Emails folder, along with the default folders “My Drafts” and “Sent Emails”. Highlight the folders that you want displayed in the Folders tab.

3. Click **Done** to save your preferences.

Mail Accounts

You can create one or more personal mail accounts in Sugar to view emails from your external mail accounts in Sugar. You can import these emails into Sugar if needed.

Group mail accounts are used to view and distribute emails addressed to the organization rather than an individual user. Only administrators can set up group mail accounts. Administrators and users can view and distribute these emails for necessary action. As a user, you can subscribe to a group mail account that is assigned to a team of which you are a member.

For outbound emails, the administrator can setup a default SMTP server that you can use to send mails. You can also specify a different SMTP server. The administrator can specify the email address, user name, and password for all users. You can change this information to suit your requirements. Your User page displays your default settings.

To create a mail account

1. Click **Settings** at the top of the page.

   This displays the **Settings** window.

2. Click the **Mail Accounts** tab in the **Settings** window.
3. Click **Add** in the **Mail Accounts** section.

   This displays the **Mail Account Properties** page.

4. Enter information for the following fields in the **Incoming Email** section:

   Mail Account Name. Enter a name for the mail account in Sugar.

   User Name. Enter the username of your external mail account.

   Password. Enter the password of your external mail account.

   Mail Server Address. To access a Gmail account, click **Prefill Gmail Defaults** to autofill the mail server address, port number, and protocol. For other accounts, such as Yahoo, enter the address of the external email server from which emails will be viewed in Sugar.

   Mail Server Protocol. Select **IMAP** from this drop-down list.

   This displays the following fields:

   Monitored Folders. By default, the system monitors the Inbox. To monitor other folders, click **Select** and view a list of available folders in the external mail account. To select multiple folders, press SHIFT or CONTROL on your keyboard.

   Trash Folder. To select a Trash folder from the Folders list, click **Select.**

   Sent Folder. To add a folder to view your outbound emails, click **Select.**

   Use SSL. If your mail server supports secure socket connections, selecting this box will force SSL connections when importing emails into Sugar. This box is automatically selected when you click the **Prefill Gmail™ Defaults** link.

   Mail Server Port. The system automatically populates this field with the port number for IMAP.

5. Click **Test Settings** to ensure that the specified information is correct. An error message is displayed if errors are detected.

6. Enter the following information in the **Outgoing Email** section:

   From Name. This field is automatically populated with your first and last names.

   From Address. Enter the email address you want to display in the **From** field of emails that you send.

   Reply to Address. Enter information in this field if you want responses to your emails to be directed to an email address other than the one specified in your incoming email account.

   Outgoing SMTP Mail Server. Select an existing SMTP server from the drop-down list or select **Add** to specify a new SMTP server. For more information, see **To add a mail server for outbound emails**.

7. Click **Done** to create the mail account.

   This displays the mail account in the **Mail Accounts** table in the **Settings** window. The outbound mail server that you specified displays below in the **Outgoing SMTP Mail Servers** section.

   All mail accounts that you create are listed in the **Mail Accounts** tab of the **Settings** page, and are marked active by default. Group mail accounts that you are allowed to access also appear in this list. When you deactivate a mail account, the account is not listed on the Folders tab and emails from that account will not display in the Sugar inbox.

8. To specify a default mail account, select the **Default** button corresponding to the mail account name. The **From** name and email address associated with the default mail account are used when you compose emails in Sugar.
9. To create another mail account, click **Add** in the Mail Accounts panel in the Settings window and repeat the process described above.If not, click **Done** to close the **Settings** page.

   To edit or delete a mail account or an outgoing mail server, click the Edit icon or the Delete icon respectively. You cannot delete Group mail accounts.

To add a mail server for outbound emails

1. Click the **Add** button located below the **Outgoing Mail Server** list.

   This displays the **Outbound Mail Server Properties** page. You can select Gmail, Yahoo!, Exchange, or Other.
2. Add the applicable server:
   - To add the Gmail server or the Yahoo! server, click the appropriate button, and enter the email address and password in the fields below
   - To add an Exchange server or a different server, click Exchange or Other respectively, and enter the server name
3. If the mail server requires authentication to send out emails, select the **Use SMTP Authentication?** box, and enter the user name and password in the fields below.
4. To check if the outgoing email settings are correct, click **Send Test Email**.

   If the settings are incorrect, Sugar displays an error message.
5. Click **Done** to add the mail server.

   The mail server displays in the **Outgoing Mail Server** drop-down list on the Mail Accounts tab.

To manage mail accounts

- To view incoming emails in your inbox, click **Check Mail** while viewing the inbox or right-click the mail account and select **Check Mail**.
- To mark the email as read, unread, flagged, or unflagged, select the email, right-click, and select **Mark** and then select the appropriate option.
- To refresh the mail account view, right-click the account, and select **Synchronize**.
- To delete the mail account, right-click the account, and select **Delete Folder**.
- To rename the mail account, right-click the account and select **Rename Folder**. Enter a new name in the Mail Account Name field and click **OK**.
- To empty the Trash folder, right-click the account and select **Empty Trash**.
- To clear the email cache directory in Sugar, click **Clear Cache Files**.

Email Folders

A folder can be an inbox or a local folder. The system displays inboxes and users can create local folders. Sugar automatically creates a folder for every mail account that you configure. Emails in these folders reside on the mail server of the associated mail account. All emails in your local folders reside in the Sugar database.

Sugar provides a local folder named *My Email* containing emails that are imported into Sugar and those that are assigned to you, your teams, and your direct reports reside. The two sub-folders, *My Drafts* and *My Sent Emails*, contain your email drafts and emails that you sent out, respectively. To group and store imported emails, you can create additional local folders.

Sugar lists folders in the General tab of the Settings window. In order to view a folder in the Folders tab of the Emails home page, you must select it in the General tab.

To create a folder

1. To create a local folder in Sugar, right-click **My Email** and select **Create Folder** in the **Folders** tab.

   The **Add New Folder** dialog box displays on the page.
2. Enter a name for the folder and click **OK**.

   The new local folder is now listed under **Folders** in the left-hand panel. This folder is not associated with any of your mail accounts. You can import emails into this folder from any of your mail accounts.
3. To create a new folder for an external mail account, select the account's inbox in the **Folders** tab, right-click, and select **Create Folder**; click **OK**.
4. To create a sub-folder, select an existing folder in the account, right-click, select **Create Folder**, and click **OK**. Alternatively, drag the folder and drop it into the other folder in the account.

To manage accounts and folders

1. To check for new mail in your external mail account, right-click the account in Sugar, and select **Check Mail**.
2. To synchronize the contents of your external mail accounts with the view in Sugar, select the account, right-click, and select **Synchronize**.
3. To delete a folder, select it, right-click, and choose **Delete Folder**. Click OK to confirm the action.
4. To rename a folder, select it, right-click, and choose **Rename Folder**. Enter the new name in the Rename Folder window and click OK to confirm the action.
5. To remove deleted emails from the account's trash bin, right-click the account or one of the folders, and select **Empty Trash**.

Composing and Managing Emails

When you compose an email, if you have configured multiple mail accounts, you can choose the account from which to send the email. By default, the system uses the signature and character set specified on the General tab of the Settings window, and assigns the email to your default teams as specified in your **User Preferences**. When composing an email, you can also assign it to a different team, specify an email template, and change the signature. You can associate an email with another record when you compose the email, or after you send it out.

To compose an email without leaving a record's List View or Detail View, use the **Quick Compose** form. To access this form, click the record's email address in a module's List View, the record's Detail View, or the **Compose Email** button in the **Activities** sub-panel of the record's Detail View.

To compose an Email

1. On the Emails Home page, click **Compose Email**.

   Alternatively, you can click the email address from a module's List View or a record's Detail View, or click the **Compose Email** button in the **Activities** sub-panel of a record's Detail View. This will display the Quick Compose email form.

2. On the **Compose Email** page, enter information for the following fields:

   From. To route the email through a specific mail account, click the down arrow to select an existing one from the drop-down list. The list contains all the outbound mail account servers set up by you or the System Administrator.

   To. Click this button to select recipients from the address book, or manually enter the names of the recipients in this field. For more information on the address book, see Using the Address Book.

   To send a copy of the email to other individuals, click **Add CC** and enter their email addresses in the **CC** field, or click the **CC** button to add recipients from the address book. To send a blind copy of the email to other individuals, click **Add BCC** and enter their names in the **BCC** field, or click the **BCC** button to select recipients from the address book.

   Subject. Enter the subject of the email.

   Enter the email text in the body field. To apply standard formatting options such as font face, size, bold, italics, indentation and color, highlight the text and click the appropriate buttons on the toolbar. You can select the desired style, format, and font from the appropriate drop-down list.

   To send the email in plain text, click the **Options** tab in the right-hand panel and select the **Send in Plain Text** box.

3. To attach a file to the email click **Attach Files**.

   The Attach options display in the right panel. To select a file from your local machine, click **Add File** and click **Browse** to navigate to the file location; To attach a file located in the Sugar repository, click **Add Documents** and click **Select** to choose the document from the Document List. To remove the document, click **Remove**.

4. To populate the email with the contents of an email template, click **Options** and select from the **Templates** drop-down list in the **Options** panel. For more information, see Creating Email Templates.

5. To change the signature from the default, in the **Options** panel, select the signature from the **Signatures** drop-down list.

6. To associate the email with a related record, select the module from the **Relate to** drop-down list located at the top of the page, and then click **Select** to specify the record from the module's List View.

   When you type a character in a field, the system performs a quick search of possible values and presents a list of values starting with that character. Typing additional characters restricts the search results.

   When searching for a name, Sugar respects the Name Display Format setting on the User Preferences page. If the setting specifies "s f l" (Salutation First Last), then Sugar displays a list of first names that start with the specified character. For example, if you enter "A", the system displays first names starting with "A". Similarly, if the Name display format specifies "s l f", then the system displays last names starting with "A".

7. To send the email, click **Send**; to save the email as a draft, click **Save Draft**. The saved drafts appear in the **My Drafts** folder.

   After you send the email, to view its related records, select it in the **Sent Emails** folder, right-click, and click **View Relationships**. Sugar displays the email's record page, which lists related records such as accounts, contacts, attachments and so on. You can view existing relationships and create new ones from this page.

To view and manage emails in the Sugar inbox

- To check for new emails in a personal email account, select the account and click **Check Mail**.
- To view an email in the panel below, select it in the List View and click it once. To view an email in a separate tab, double-click it in the List View.
- Right-click an email in the inbox to perform any of the following actions:
  - To import the email, open the email and click **Import to Sugar**. Alternatively, select the email in the List View, right-click, and select **Import to Sugar**. For more information, see To import emails to Sugar.
  - To respond to the email, select **Reply**.
  - To respond to all recipients of the email, select **Reply All**.
  - To forward it to another individual, select **Forward** and enter the email address of the recipient.
  - To delete an email when you view it, click **Delete**; to delete multiple emails, select them from the email list and click **Delete**.
  - To print the email, click **Print**.
  - To mark an email as unread, read, flagged, or unflagged, select **Mark**, and choose the option of your choice.
- To view multiple emails, select two or more emails from the list, right-click, and select **Open Multiple Messages**.
- To create a record from the email, open the email and select the record type from the **Quick Create** drop-down list. For more information, see To create a record from an imported email.

- To view the email header information or the raw email text for debugging purposes, click **View** and select **Display Headers** and **Display Raw Email** respectively from the drop-down menu.
- To update information such as email assignments and status change for multiple emails, select them from the Emails list and use the **Mass Update** panel as described in Editing and Deleting Multiple Records.
- To assign an imported email, select it from the list, right-click, and select **Assign To**. See To assign emails to users and teams for more information.
- To associate an email with another Sugar record, select the email from the Group mail inbox, right-click, and select **Relate**. See Associating Imported Emails with Other Sugar Records for more information.

Using the Address Book

When composing an email, you can select email recipients from the address book, which lists existing users, contacts, leads, targets, and accounts. By default, all of these individuals are listed in the address book. However, you can filter the list if you want to view a specific group such as contacts or users. You can also search for an individual by first name, last name, email address, or account name.

To use the address book

1. To view the address book, click the **To** button on the Compose Email page.

   The **Address Book** window displays on the screen. If the list is paginated, the page number display below. You can click the right arrow to move to the next page or the left arrow to move to the previous page. You can also click a page number to go directly to that page. To move to the first page, click the double-left arrow and to move to the last page, click the double-right arrow.
2. To select email recipients, select them in the address book and click **Add To**. To add recipients to the CC list, click **Add To CC**; to add recipients to the BCC list, select **Add To BCC**.

   The selected names display in the Selected column.
3. To filter the listings displayed in the address book, select the filter from the Recipient Type drop-down list.

   The address book listing changes to display only the specified individuals.
4. To search for an individual, enter a letter or a keyword such as first name, last name, email address, or account name in the Search field and click the adjacent button. When you enter a letter, Sugar will display all first names, last names, and account names that start with that letter.

Importing Emails into Sugar

Importing emails from external mail accounts or from email clients, such as Microsoft Outlook, enables you to manage them in Sugar. You can assign imported emails to other users and teams for follow-up, and relate them to records. Imported emails display in the My Emails folder. You can also view unread imported emails in the My Emails dashlet, if you can add it to your Home page.

To import emails to Sugar

1. On the Folders tab, click the inbox of your external mail account in Sugar
2. Select the emails that you want to import, right-click, and select **Import to Sugar**. Alternatively, drag the email from the list to a local folder.

   The **Import Settings** window displays on the screen.
3. Enter information for the following fields:

   Teams. The email record is, by default, assigned to your default team specified in your User Preferences page.

   Assigned To. To assign it to a different user, click **Select** to select from the Users List View.

   Relate To. To relate the email to another record, select the module from the drop-down list, and then click **Select** to select the record from the module's List View.

   Delete message from server. Select this box to delete the email from the external email server after you import it to Sugar.
4. Click **Import to Sugar** to import the emails into Sugar.

   Sugar displays a message after the email has been successfully imported. The import email now displays in your My Emails folder.

To assign emails to users and teams

To assign one or more imported emails from your My Emails folder or from a Group account to a different user or team, do the following:

1. Select the email from the list, right-click, and select **Assign To**.

   The **Assign To** dialog box displays on the screen
2. To assign a user, click the **Select** button adjacent to the **Assigned To** field, and choose from the list of existing users.

   The selected user's name displays in the **Assigned To** field.

   To assign a team, click the **Select** button above the **Teams** field. You can assign more than one team. The first team on the list is the primary team by default. You can change the primary team if needed.
3. To change an assigned user or team, select **Replace** and then click appropriate **Select** to choose a different user or team.
4. Click **Assign**.

   The emails no longer display in your My Emails folder or the Group account folder, but instead, appear in the My Emails folder of the assigned user.

Searching for Imported Emails

You can search for imported emails using one or more of the following fields: Subject, From, To, Date From, Date Until, Relate To, Assigned To, and Attachment. The **Date**

From and **Date Until** time range applies to emails that were sent as well as emails that were received.

To search for imported emails in Sugar

1. Navigate to the **Search** tab located in the left-hand panel of the **Emails** home page.

   The **Subject**, **From**, and **To** fields display in the panel. Click **More** to view all the Search fields.

2. Enter the appropriate information to search for imported emails in the system.
3. Click **Search**.

   The search results display imported emails assigned to you, your teams, and your direct reports in the List View.

Associating Imported Emails with Other Sugar Records

You can associate an email with records in other modules, such as accounts, contacts, and bugs, during any of the following processes:

- **Importing emails**: In the **Import Settings** window, you can select a record from another module using the **Relate To** drop-down list and the adjacent field.
- **Viewing emails**: When you open an email, click the Quick Create drop-down list to select the record that you want to create, such as a bug, case, contact, lead, or task. Sugar creates the new record and associates it with the email. Related emails are listed in the History sub-panel of the record's Detail View.

  Alternatively, select the email from the list, right-click, and select **Relate**. In the **Relate Email** window, select the module from the **Related To** drop-down list, and click **Select** to choose the record with which to relate the email.

- Composing emails: You can use the **Relate To** drop-down list and adjacent field, located at the top of the page, to select a record from another module.

To relate an email with another record

1. Select the email from the list, right-click, and select **Relate**.

   The **Relate Email** dialog box displays on the screen.

2. Select the record type from **Relate To** drop-down list, and click **Select** to view the list of records and choose one.
3. Click **Relate** to create the association.

   The email is now associated with the selected records and is listed in the **History** panel of the record's detail page.

To create a record from an imported email

1. To create a record such as a bug or a case, open the email, click **Quick Create**, and select the record type from the drop-down list.

   The appropriate Quick Create form displays on the screen. The screen illustrated below displays the Quick Create form to create a lead.

2. Enter the necessary information and click **Save** to create the record.

   If you have not already imported the email, it will be imported and associated with the new record when you use Quick Create to create the record.

Creating Email Templates

You can use email templates to create form letters for automated email responses to inbound emails and for email campaigns. For example, when you receive an email regarding a bug or a case, you can send out an automatic reply stating that the matter will be addressed.

For email campaigns, you enter the message in the template and then specify the variables such as the target names and addresses from the campaign target list. The system inserts these variables into the template to create a personalized email for each target. When you create an email template, you can embed images and attach files from the Sugar repository or from your local file system.

When you create a template for an email campaign, you can insert tracker URLs into the template to track campaign activity. For more information on email campaigns, see Executing an Email Campaign.

To create an email template

1. Select **Create Email Template** from the **Actions** drop-down list on the **Emails** tab.

   If you are creating an email template for email campaigns, navigate to the Email Marketing record from an Email or Newsletter campaign's Detail View, and click the **Create** link that is located next to the Email Template field.

2. Enter information for the following fields:

   Name. Enter a name for the template.

   Team. Select the team that is allowed to view the template from this drop-down lists.

   Assigned to. To assign the template to a user, click the arrow button and select from the Users list.

   Description. Enter a brief description about the template.

   Insert Variable. From the drop-down list, select the record (for example **Contact**) and select a field such as **Name** and click **Insert**.

   The system displays the variable in the **Body** field.

3. **Insert Tracker URL**. This field displays only when you create the template from the email marketing record of an email campaign. From the drop-down list, select the tracker URL to insert and click **Insert URL Reference**.

   The **Body** field displays a link named **Default link text**. The adjoining field displays the tracker name for plain text format. Use this if you want to display the email in plain text format.

4. **Subject**. Enter the title of the message.

5. **Body**. Enter the email message. You can also embed images and add URL links.

To view and use the HTML editor, click **HTML** in the **Body** field.

6. To apply standard formatting options such as font face, size, bold, italics, indentation and color, highlight the text and select the appropriate option in the Body field.
7. **Send Text only.** Select this box to display the email in plain text format. You can choose this option if an email client cannot render HTML code.

   Attachments: To attach a file, click **Browse** to navigate to its location on your local machine, and select it. To attach an existing document from the **Documents** module, click **Sugar Document** and select it from the **Document List**.

   Documents that link to an external account, for example, Google Docs, IBM LotusLive etc, cannot be used as attachments in emails composed through the Sugar Email client.

   To embed an image file in the template, click the paper clip icon that displays next to the file; to remove the attachment, click the **Remove** button.
8. Click **Save** to create the template.

To manage email templates

- To search for a template, enter the name or description in the **Search** sub-panel on the **Email Templates** page, and click **Search**.
- To view the details of a template, click the template name from the list on the **Email Templates** page.
- To edit the template, on the detail page, click **Edit**, make the changes, and click **Save**.
- To duplicate the template, on the detail page, click **Duplicate** and click **Save**.
- To delete the template, on the detail page, click **Delete**; to delete some or all the templates, select them from the list on the **Email Templates Home** page, and click **Delete**.
- To export one or more templates, select the templates from the list on the **Email Templates Home** page, and click **Export**.
- To deselect templates that you selected in the list, click **Clear All**.

Tasks Module

The Tasks Module has been introduced as a separate module in Release 6.2.0 to allow for ease of use and access. Use the this module to schedule and manage tasks.

The **Actions** drop-down list on the **Tasks** tab displays the following options:

Create Task. Select this option to create a task as described in Creating Tasks.

View Tasks. Select this option to view and manage tasks as described in To manage tasks.

Import Tasks. Select this option to import external data into a note as described in Importing Data.

Creating Tasks

Sugar enables you to create tasks and assign them to yourself or to other users. When you create a task, you can relate it to a specific record such as an account or an opportunity. You can also revise the task status and priority at any time to keep your records up-to-date.

To create a task

1. Select **Create Task** from the **Actions** drop-down list on the **Tasks** tab.

2. Enter information in the following fields on the **Tasks** page:

   Subject. Enter the subject of the task.

   Status. Select the current status of the task, such as **Not Started, In Progress**, and **Completed** from this drop-down list.

   Start Date. Click the **Calendar** icon and select the start date for the task; When you enter a date, you must also select the time, in hours and minutes, from the adjoining drop-down lists. If there is no specific start date for the task, select the **None** box.

   Due Date. Click the **Calendar** icon and select the completion date for the task; enter the time in the adjoining box. If there is no specific deadline for the task, select the **None** box.

   Enter the due date information if you want to add the task on your calendar to receive a reminder when it is due.

   Priority. Select a priority that reflects the importance of completing the task from this drop-down list.

   Description. Enter a brief description of the task.

   Related to. Enter the name of the related account or click **Select** to search for one. You can choose related record from other modules, for example, Opportunities, Bug Tracker etc., from this drop-down list.

When you type a character in the field, the system performs a quick search of possible values and presents a list of values starting with that character. Typing additional characters restricts the search results. When searching for a name, Sugar respects the Name Display Format setting on the User Preferences page. If the setting specifies “s f l” (Salutation First Last), then Sugar displays a list of first names that start with the specified character. For example, if you enter “A”, the system displays first names starting with “A”. Similarly, if the Name display format specifies “s l f”, then the system displays last names starting with “A”.

Contact Name. Click **Select** to select an individual from the **Contacts** list. Typically, this is the contact for the specified account.

Assigned to. Click **Select** to select the individual who is assigned to the task. By default, it is assigned to you.

Teams. To change the primary team assignment, enter the name of the new primary team. To assign additional teams to the record, click **Select** to choose new teams from the Teams List, or click **Add** to add additional team fields and enter the team names. For more information on assigning teams, see Assigning Records to Users and Teams.

3. Click **Save**.
4. To change the status of the task to **Completed** and create a new one, click **Close and Create New**. The status of the new task, by default, is set to **Not Started**.

To manage tasks

- To edit or delete multiple tasks, use the **Mass Update** panel in the **Actions** drop-down list in the Tasks List View as described in Editing and Deleting Multiple Records.
- To view the details of a task, click its subject in the Tasks List View.
- To edit the information, click **Edit** on the task’s Detail View page, revise the information, and click **Save**.
- To duplicate the information, click **Duplicate** on the task’s Detail View page, make modifications if needed, and click **Save**. Duplication is a convenient way of creating a similar task. You can change the information in the duplicate record to create a new task.
- To import tasks, select **Import Tasks** from the **Actions** drop-down list of the Tasks tab. For more information on importing data, see Importing Data.
- To delete the task, click **Delete** on the tasks’s Detail View page.

Notes Module

The **Notes** Module has been introduced as a separate module in Release 6.2.0 to allow for ease of use and access. Use the this module to create, view, and import Notes and attachments to records in Sugar.

The **Actions** drop-down list on the **Notes** tab displays the following options:

Create Note or Attachment. Click this option to create a note or an attachment for a call, a meeting, or a task as described in Creating Notes and Attachments.

View Notes. Click this option to create or view notes as described in Creating Notes and Attachments.

Import Notes. Click this option to import external data into a note as described in Importing Data.

Creating Notes and Attachments

You can create and view notes from the Notes module or from the History sub-panel of a record's Detail View. Notes enable you to add comments on a subject and maintain a record of discussions pertaining to a call, meeting, or task. You can also attach supporting documents to a note.

To create a note or add attachments

1. Select the **Create Note or Add Attachments** from the **Actions** drop-down list of the **Notes** module or click the Create icon on any page in the Notes module. Alternatively, click the Create Note or Attachment icon in the Shortcuts Bar.
2. Enter information for the following fields in the **Create** (Notes) page:

   Contact. Enter the name of the contact. Click **Select** to choose one from the Contacts list or to search for a contact in the list.

   Related To. Select the related record from the drop-down list or click the **Select** icon to search for one.

   When you type a character in a field, the system performs a quick search of possible values and presents a list of values starting with that character. Typing additional characters restricts the search results.

   When searching for a name, Sugar respects the Name Display Format setting on the User Preferences page. If the setting specifies "s f l" (Salutation First Last), then Sugar displays a list of first names that start with the specified character. For example, if you enter "A", the system displays first names starting with "A".

Similarly, if the Name display format specifies “s l f”, then the system displays last names starting with “A”.

Subject. Enter the subject of the note. This is a mandatory field, as indicated by the red asterisk.

Attachment. Click **Browse** to attach a document that located on your machine, navigate to the location of the file, and select the file.

Note. Enter the text of the note in this box.

Assigned to. Enter the text of the note in this box.

Teams. To change the primary team assignment, enter the name of the new primary team. To assign additional teams to the record, click **Select** to choose new teams from the Teams List, or click **Add** to add additional team fields and enter the team names. For more information on assigning teams, see Assigning Records to Users and Teams.

3. To assign the note to a user, scroll down to the **Other** section, and click the arrow button to select a user from the Users list.
4. To assign the note to a team, scroll down to the **Other** section, and click the arrow button to select a team from the **Teams** list.
5. Click **Save** to create the note or attachment; click **Cancel** to return to the **Notes** home page without saving your changes.

To manage notes

- To edit or delete multiple notes,use the **Mass Update** panel in the **Actions** drop-down list of the Notes List View as described in Editing and Deleting Multiple Records.
- To view the details of a note, click its Subject on the Notes List View.
- To edit the information, navigate to the Detail View of the Note, click **Edit**, revise the information, and click **Save**.
- To duplicate the information, click **Duplicate** in the note’s Detail View page. Duplication is a convenient way of creating a similar note. You can change the information in the duplicate record to create a new note.
- To import notes, select **Import Notes** from the **Actions** drop-down list of the Notes tab. For more information on importing data, see Importing Data.
- To delete the note, click **Delete** on the note’s Detail View page.

Targets Module

Use the Targets Module to track and manage targets as part of mass marketing campaigns. You can create many types of campaigns as described in Creating a Campaign.

A mass marketing campaign targets a large group of individuals or organizations. Therefore, the campaign process begins with identifying the targets. You can group multiple targets into a target list according to a set of predetermined criteria such as age group or spending habits.

You can associate a record with an existing campaign from Contacts, Leads, and Opportunities.

Creating and importing Targets

A target is an individual that you have some information on, but is not qualified as a lead or contact. Targets are stand-alone records that are not attached to contacts, leads, or opportunities. For more information on Target Lists, see Target Lists Module

Typically, you would create or import a target list, associate it with targets, and then associate it with a campaign. However, you can also create the campaign first and then associate it with a target list.

The general process is as follows:

Targets → Target List → Campaign

To create a target

1. Select **Create Target** from the **Actions** drop-down list on the **Targets** tab.

   Or, click the Create link in any Targets page.

Note: Targets are stand-alone records that are not attached to Contacts or Leads. If you plan to send emails to existing Contacts or Leads, you can skip the step below.

2. Enter information for the following fields in the **Create** (Targets) page:

   Target Overview

   First Name. Enter the target's first name

   Last Name. Enter the target's last name

   Title. Enter the designation of the target

Department. Enter the name of the department to which the target belongs

Account Name. Enter the name of the account related to the target

Office Phone. Enter the target's work number

Mobile. Enter the target's mobile phone number

Fax. Enter the target's fax number

Address Information. Enter the address information in the **Primary Address** section and select the **Copy address from left** checkbox to copy it to the Alternate Address section.

Email address. Enter one or more emails addresses for the contact and select Primary. If an email address is incorrect, select Invalid to indicate it. If you sent out campaign emails this contact and the individual chose to opt-out of receiving them, select **Opted Out**.

To add an additional email address, click Add Address. You can add multiple email addresses.

Description. Enter a brief description of the target

More Information

Do Not Call. Select this box to add the target's name to the **Do Not Call** list.

Other

Assigned to. Select the user who has ownership of the account related to the target.

Team. Select the team that is allowed to view the account related to the target. To change the primary team assignment, enter the name of the new primary team.

To assign additional teams to the record, click **Select**, and choose the team from the Team List, or click **Add** to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.

Assigned to. Select the user who has ownership of the account related to the target.

3. Click **Save**.

This displays the target's Detail View page. You can now add the target to an existing target list. For more information, see .The target's detail page displays the **Campaign Log** sub-panel which lists all the campaigns that were sent to the target.

Target Lists Module

Use the Target Lists Module to track and manage mass marketing campaigns. You can create many types of campaigns as described in Creating a Campaign.

Creating Target Lists

You can use one of the following methods to add targets to a target list:

- Import records from a file (.csv or .tsv). For information on importing targets, see Importing Data.
- Select records from the List View of Accounts, Contacts, Leads, and Targets.

A target list can specify either individuals who need to be included in a campaign or excluded from a campaign. You can create one of the following types of target lists:

Default. A list of people who are campaign targets and receive the campaign email.

Seed. A list of people who need to receive the campaign email but must not be tracked as potential leads. Typically, these are individuals who must approve the campaign before it is launched.

Test. A list of people who receive the campaign email to test how different email clients display the campaign message before you send it out to the default list.

Suppression List. A list of people you want excluded from the campaign email recipient list. Typically, these are people who chose to opt out of receiving your campaign message. Suppression lists can be by ID, email address, or domain.

Note: Test and seed lists are ignored in email tracking statistics.

If you have multiple targets with the same email address, Sugar will send the campaign email to only one of the targets, chosen at random. The other email addresses, considered to be duplicates, are suppressed even though they are not on the opt-out list.

For non-email campaigns, if you have purchased a license for the Sugar Plug-in for Microsoft Word, you can create a form letter in Word for your targets and merge it with names and addresses of your targets in Sugar to create a customized campaign letter for each target. For more information on the plug-in, see *Sugar Plug-in for Microsoft Word*. For more information on performing a mail merge, see Performing a Mail Merge.

To create a target list

1. Select **Create Target Lists** from the **Actions** drop-down list on the Target Lists tab**,** or click the **Create** link in any **Target Lists** page**.** Alternatively, you can create or select an existing target list from a Campaign's Detail View.
2. Enter the following information in the **Create** (Target Lists) page:

   Name. Enter a name for the target list.

   Type. Select the target list type such as Default or Seed from this drop-down list.

   User. Enter the name of the individual you want to assign to the record or click **Select** to choose from the User List. By default, this record is assigned to you.

   Description. Enter a brief description of the target list

   Teams. To change the primary team assignment from your default team to a different team, enter the name of the new primary team.

   To assign additional teams to the record, click **Select**, and choose the team from the Team List, or click **Add** to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.
3. Click **Save**.

   You can now add records to the target list from the List View of Accounts, Contacts, Leads, and Targets.

Campaigns Module

Use the Campaigns Module to track and manage mass marketing campaigns. You can create many types of campaigns as described in Creating a Campaign.

Creating a Campaign

You can create a campaign using the **Campaign Classic** option or the **Campaign Wizard** option. When you use the **Campaign Classic** option, you are creating a campaign record but you are not completing related tasks such as specifying the email settings. For more information on creating a campaign using the Classic option, see Creating a Campaign.

When you use the **Campaign Wizard**, it guides you through the process of creating the campaign as well as completing related tasks. For more information on creating a campaign with the Campaign Wizard, see Using the Campaign Wizard.

The Campaigns module provides an embedded Return on Investment (ROI) form that you can use to gauge the success of an executed campaign. For more information, see Viewing a Campaign's Return on Investment.

Types of Campaigns

You can create the many types of marketing campaigns such as Email, Newsletter, Mail, Web, Radio, Television, Print, and Telesales.

When you create a campaign such as Mail and Radio, you are creating a record in Sugar for your reference. However, you cannot execute the campaign through Sugar.

When you create an email campaign or a newsletter campaign, you can execute it through Sugar. An email campaign is a one-time email containing information that is of interest to your targets. A newsletter campaign is an email campaign containing a newsletter sent to your targets at periodic intervals. For example, a newsletter can contain information on product updates. You can send out a newsletter on a weekly, monthly, quarterly, or yearly basis. To measure the campaign's success, you can view statistics such as the number of targets that responded, the number of opportunities that were created, and the generated revenue.

After you launch an email or newsletter campaign, you can view its status to determine its success. For example, you can view how many targets viewed the campaign email, how many clicked any links that were included in the email, and how many leads and contacts were created from the campaign. For more information, see Managing Campaigns.

To capture leads from an email or a newsletter campaign, you can create a Web-to-Lead form. For more information, see Creating Web-to-Lead Forms.

For email campaigns, you can embed images to your email templates instead of sending them as attachments to prevent the email from being reported as spam. For more information on attaching images, see Creating Email Templates.

A campaign diagnostic tool is provided to help ensure that all pending administrative tasks, such as setting up a bounce-handling inbox, have been completed. For more information, see Using the Campaign Wizard.

Note: You must be an administrator to use the **Email Setup** option that displays on the module tab **Actions** drop-down list.

To create a campaign

1. Select **Create Campaign (Classic)** from the **Actions** drop-down list on the **Campaigns** tab.
2. Enter information for the following fields:

   Name. Enter the campaign name.

   Assigned to. Enter the name of the user assigned to the campaign; to choose a user from the Users list, click **Select**, and click the user name.

   Team. Enter the name of the team that is allowed to view the campaign information; To change the primary team assignment, enter the name of the new primary team.

   To assign additional teams to the record, click **Select**, and choose the team from the Team List, or click **Add** to add more fields and enter in the team names. For more information on teams, see Assigning Records to Users and Teams.

   Status. Select the current status of the campaign from the drop-down list.

   Start Date. Click the **Calendar** icon and select the date on which the campaign begins.

   End Date. Click the **Calendar** icon and select the date on which the campaign ends.

   Note: The Start Date, End Date, and Status values are for your records only. These values do not impact the execution of an email marketing campaign.

   Type. From the drop-down list, select the campaign type such as email or trade show. For more information on email campaigns, see Executing an Email Campaign.

   Currency. From the drop-down list, select the currency used to calculate the budget, cost, and revenue.

   Impressions. Enter the number of page impressions generated from the campaign. You will need to fill in this field after the campaign has commenced.

   Budget. Enter the budget for the campaign.

   Actual Cost. Enter the actual cost incurred to conduct the campaign.

   Expected Revenue. Enter the estimated revenue from the campaign.

Expected Cost. Enter the estimated cost of the campaign.

Objective. Explain the goal of the campaign.

Description. Enter a brief description of the campaign.

3. Click **Save** to save the campaign; click **Cancel** to return to the Campaigns home page without creating the campaign.

   Sugar displays the campaign's Detail View on the screen. This page contains sub-panels for targets, tracker URLs, and email marketing to create and view relevant information.

Executing an Email Campaign

Both the administrator and the user must perform a set of tasks to send an email campaign.

The administrator must complete the following tasks:

- Set up outbound emails to enable you to send out email campaigns, and specify the number of campaign emails in each batch.
- Specify a bounce-handling inbox to route campaign emails that bounce back to you. Bounced emails contain specific identifiers that set them apart from emails that are responses from your targets.
- Set up Scheduler jobs to process nightly mass email campaigns and bounced campaign emails.

The user must complete the following tasks:

1. Create an email campaign as described in To create a campaign. Alternatively, you can use the Campaign Wizard to create the campaign as described in Using the Campaign Wizard. The Campaign wizard will guide you through the steps listed below.
2. Specify the targets as described in Creating and importing Targets. You can import targets, create a new target list, or merge with existing target list. You can also select individuals from lead report and contact reports.
3. Create an email template containing the message you want to convey to your targets. For more information, see Creating Email Templates.
4. Set up tracker URLs to track response to your campaign. For more information, see Creating Tracker Redirect URLs.

   For more information on creating a mailbox, see Email Settings.
5. Create an email marketing record that specifies information such as the target list, the email template, the campaign start date, and the bounce-handling inbox. For more information, see Creating Email Marketing Records.
6. Optionally, specify one or more Tracker Redirect URLs to track campaign activities. For more information, see To create a tracker redirect URL.
7. Optionally, run the diagnostic tool to ensure that the email campaign will be successfully executed. For more information, see To run diagnostics.
8. Send a test email to your test list to ensure the operation is successful. For more information on test lists, see Creating and importing Targets.

9. Clear statistics from the test email.
10. Request the administrator to schedule a job to send out the campaign emails.
11. Queue the email for the campaign launch.
12. Optionally, convert the campaign targets into leads or contacts.

You can associate a Web-to-Lead form with the campaign. For more information, see Creating Web-to-Lead Forms.

After you launch an email campaign, you can view the campaign status for information on the campaign results. For more information, see Viewing Campaign Status.

Note: The start date, start time, and status specified on the email marketing page determine when the email is sent.

Creating Email Marketing Records

When you create an email campaign, you must also create an email marketing record that contains information on when and how the newsletter should be distributed. This includes the campaign target list, the email template, and the inbox to route bounced emails. The specified start date and time must pass before the campaign is queued for delivery. Emails that bounce back are sent to the From address defined in this record.

To create an email marketing record

1. In the campaign's Detail View, scroll down to the **Email Marketing** sub-panel and click **Create**.
2. On the **Email Marketing** page, enter information for the following fields:

   Name. Enter a name for the record.

   Status. From the drop-down list, select **Active** if the record is in use; only active records are queued for the campaign launch. Select **Inactive** if the record is not in use.

   Use Mailbox. From the drop-down list, select a mailbox that is set up for Bounce Handling.

   From Name. Enter the name of the organization or person that is sending out the email.

   Start Date & Time. Click the **Calendar** icon and select a date to send out the email. Enter the time in the adjoining field.

   Note: To queue the email for campaign launch, select a date and time that have not already passed. Do this after you ensure that the test email was successful.

   Email Template. From the drop-down list, select an existing email template; to edit a template or create a new one, click the adjoining **Create** or **Edit** link respectively.

You will need to edit the template to add the Tracker URLs described below into Text and HTML formats.

Send This Message to. Select one or more target lists from the box below; to send it to all the target lists in the box, select the **All Target Lists in the Campaign** box.

3. To save the record, click **Save**; click **Cancel** to exit the page without saving your changes.

Creating Tracker Redirect URLs

A campaign email can contain not only the campaign message but also images and links. Links can direct targets to other URLs such as an external website or a*.php* file on your system.

You can create an Opt-out tracker URL to embed a “Unsubscribe” link that enables targets to unsubscribe themselves from your campaign mailing list. When targets click on the Opt-out link, the system logs the action for your records.

You can use one or more tracker URLs in your campaign emails to track the response to your campaign. The system generates a unique key for each URL and recipient and associates it with the email template. When recipients open the email and click on a URL link, the system uses the unique key identifier to track their action.

The Status page displays a Recipient Activity bar chart listing actions, such as Viewed Message and Opted Out. You can drill down the chart to view the list of recipients who performed a specific action. For more information, see Viewing Campaign Status.

Note: Before you create a campaign email, check with your system administrator to ensure that the outbound email process is configured to send emails from your system.

To create a tracker redirect URL

1. On the Campaign’s detail page, scroll down to the **Tracker URLs** sub-panel, and click **Create**.
2. On the **Campaign Trackers** page, enter information for the following fields:

   Tracker Name. Enter a tracker name for your reference; use alpha-numeric characters.

   Tracker URL. Enter the tracker URL; for example, http://www.sugarcrm.com.

   Opt-out Link? Select this box to embed your **Unsubscribe** instructions in a tracker URL. By default, the system uses the *removeme.php* file which contains these instructions, and displays this file name in the Tracker URL field.
3. To create the campaign tracker, click **Save**; click **Cancel** to exit the page without saving your changes.

   Sugar generates the tracker URL and displays it as “URL for Campaign Message”.

You can now insert this tracker URL into an email template of your choice. To create an email template containing tracker URLs, access the Email Template Editor from within an Email Marketing record. For more information on email templates, see Creating Email Templates.

Using the Campaign Wizard

You can use the Campaign Wizard to guide you through the process of creating a campaign.

To create a campaign using the Campaign Wizard

1. Select **Create Campaign (Wizard)**From the **Actions** drop-down list on the Campaigns tab.

   This displays the Campaign wizard.
2. Select the type of campaign you want to create and click **Start**.
3. Enter information for the following fields:
   - **Name**. Enter the campaign name.
   - **Status**. From the drop-down list, select the current state of the campaign.
   - **Assigned to**. Enter the name of the user who is assigned to the campaign. To select from the **Users** list, click **Select**. By default, it is assigned to you.
   - **Team**. Enter the name of the team that is assigned to the campaign. By default, it is assigned to you. To change the primary team assignment, enter the name of the new primary team.

     To assign additional teams to the record, click **Select**, and choose the team from the Team List, or click **Add** to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.
   - **Type**. If you are creating a non-email campaign, select the campaign type from the drop-down list.
   - **Frequency**. This field displays only for newsletter campaigns. From the drop-down list, select the intervals at which the newsletter will be emailed to targets.
   - **Start Date**. Enter the campaign start date; click the **Calendar** icon to select the date.
   - **End Date**. Enter the campaign end date; click the **Calendar** icon to select the date.
   - **Description**. Optionally, enter a brief description of the campaign.
4. Click **Next** to enter the campaign budget information.
5. Enter information for the following fields:
   - **Budget**. Enter a numerical value for the campaign budget.
   - **Actual Cost**. Enter the actual cost of the campaign.
   - **Impressions**. The number of times the campaign advertisement is viewed on the web.
   - **Expected Cost.** Enter the expected cost of the campaign.

- **Expected Revenue**. Enter the estimated revenue from the campaign.
- **Currency**. From the drop-down list, select the currency used for the campaign.

6. Click **Next** to enter the tracker URL information.
7. Enter information for the following fields:

   Tracker Name. Enter a tracker name.

   Opt-out link? Select this box to create an opt-out tracker that allows targets to unsubscribe from your email campaigns.

   If a target chooses to opt out of an email campaign, the system suppresses the target's information to ensure that they never receive any of your email campaigns or newsletter campaigns. The system also automatically selects the **Email Opt Out** option on the target's detail page.

   However, if a target chooses to unsubscribe from a newsletter campaign, the system suppresses the target information only for that specific campaign. You can still include it in target lists for other newsletter campaigns and email campaigns.

   Tracker URL. Enter the tracker URL. For more information, see Creating Tracker Redirect URLs.

8. Click **Create Tracker**.

   Sugar displays the new tracker.

   To create additional tracker URLs, click **Create Tracker** again and enter the new tracker information.

9. Click **Next**.

   If you are creating an email campaign or a non-email campaign, Sugar displays the Target Lists on the screen.

   For a newsletter campaign, the Subscription Information page displays on the page.

   a. To use an existing target list, click **Select** and use the **Search** panel to find the list.
   b. To create a new target list, enter its name in the **Target List Name** field and select the type from the adjoining **Target List Type** field.

   Sugar displays the target list name below.

10. For newsletters, you must create the following three subscription lists:

    - **Subscription list:** These targets receive the newsletter regularly.
    - **Unsubscription list**: These targets are those who have chosen to opt-out of your mailing list.
    - **Test list**: These targets are the recipients of the test email that you send out to ensure it is successful.

    a. To create a custom list, select **Allow Select** and click **Select** to search for targets and create the list.
    b. For a system-generated list, select **Auto-Create** and the system displays the name of the list in the field above the **Select** button.

11. To save the campaign information and begin the process of specifying other details such as the email settings, click **Save and Continue**. If you plan to specify the email settings later, click **Finish**.

    When you click **Save and Continue**, the Marketing Email page displays on the screen. For more information, see Creating Email Marketing Records.

    After clicking **Finish**, the campaign's Detail View displays on the screen.

    You can edit the information and create an email marketing record from this page.

Running Campaign Diagnostics

Executing an email campaign or a newsletter campaign involves several steps, some of which can be performed only by your administrator. The campaign diagnostic tool enables you to check if all pending administrative tasks have been completed before you attempt to launch the campaign.

To run diagnostics

1. From the Campaigns tab, select **Diagnostics**.

   Sugar displays the **Campaign Diagnostics** page on the screen.

   If the email settings and a bounce-handling inbox have not been configured, warning messages display on this page. Contact your administrator to complete these tasks.

2. To perform the diagnostics again, click **Re-Check**.

Testing Campaigns

Before you launch an email or newsletter campaign, it is recommended that you test it to check how different email clients display the campaign message.

To test a campaign click **Send Test** and on the Campaign's detail page, select the message, and click **Send**. Ensure that you are sending out the campaign to the Test target list.

Note that in test mode, the system disables your suppression lists. Therefore, the campaign message is sent to targets on your suppression lists. The system also disables checks for duplicate email addresses, thereby allowing users to send a message multiple times.

Managing Campaigns

Managing campaigns includes tasks such as sorting, editing, and duplicating campaign information.

- To sort the list view, on the Campaigns Home page, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To update information for some or all campaigns, on the **Campaigns** home page, use the **Mass Update** panel as described in To edit or delete multiple records.
- To view the campaign's details, click the campaign name on the list. From the detail page, you can create Tracker URLs and Email Marketing Records for email

campaigns. For more information on email campaigns, see Executing an Email Campaign.

- To edit the campaign information, on the detail page, click **Edit**.
- To duplicate the campaign information, on the detail page, click **Duplicate**. Duplication is a convenient way of creating a similar campaign. You can change the information in the duplicate record to create a new campaign.
- To perform a mail merge, on the detail page, click **Mail Merge**. For more information, see Performing a Mail Merge.
- After you launch non-email campaign such as a Telesales or a Mail campaign, you will need to mark the campaign manually as "sent". To do this, click **Mark as Sent** on the campaign's detail page. When you click this button, the **Campaigns** sub-panel on a targets' detail page indicates the **Activity Type** as **Message Sent** to indicate that the campaign material was sent to that individual.
- To delete a campaign, on the detail page, click the **Delete**.
- To send an email campaign to the test group before the formal launch, click **Send Test**.
- To queue email campaigns for the launch, click **Send Emails**.
- To send out the campaign message to the target audience, click **Send**, and on the **Campaign Send** page, select the message and click **Send**.
- To view the campaign status, see Viewing Campaign Status
- To track changes to a campaign over time, in the Detail View, click the **View Change Log** link.
- To export information on one or more campaigns, select them in the **Campaigns** List View page, click the **Export** option in the **Actions** drop-down list, and export them as described in To export data from Sugar.
- To view or manage related records in a sub-panel, see To manage related information in sub-panels.

Viewing Campaign Status

After you launch a campaign, you can view its results on the Campaign Status page to determine its success. A campaign's status displays data such as the number of messages sent and the number of messages that bounced back; how many targets viewed the campaign message, the number of lead and contact records that were created, and so on. This enables you to evaluate the effectiveness of the campaign for further action. For example, you can add targets that opted out of the campaign to the Unsubscription target list to ensure that they are not recipients of campaign emails in the future.

The sub-panels in the Detail View display the following information:

- A chart depicting the responses from campaign targets. This includes how many targets viewed the message, how many open any links that were included in the campaign email, and how many opted out of the campaign
- A list of any campaign emails that are still in the queue.
- A list of processed campaign emails.

- A list of targets who viewed the campaign email.
- A list of targets who viewed any links that were included in the campaign email.
- A list of leads resulting from the campaign. Leads are created when targets identify the campaign and, as a result, are converted into leads.
- A list of contact records that were created as a result of the campaign. These contacts are created when leads identify the campaign and, as a result, are converted into contacts.
- A list of campaign emails that bounced back because of invalid email addresses. This information is tracked only if your administrator has scheduled a job to track bounced emails.
- A list of campaign emails that bounced back for other reasons.
- A list of targets that opted out of the campaign.
- A list of email addresses that were added to the Suppression list. These include those that you added to the list, those that were marked as "Opt Out", and email addresses that were invalid.
- A list of opportunities that were generated from the campaign.

To view a campaign's statistics, click **View Status** on the **Campaign** detail page.

The system displays the campaign's status information such as the targets' response, number of leads created, and so on.

Viewing a Campaign's Return on Investment

For any campaign that you execute, Sugar provides an embedded ROI report based on the "Closed/Won" opportunities generated from the campaign. You can view this report from the campaign's detail page.

To view a campaign ROI report

1. Navigate to the campaign's Detail View.
2. Click the **View ROI** option that is located next to the View Status option.

   Sugar displays the ROI chart on the screen. This chart displays the actual revenue versus the expected revenue generated from the campaign, as well as the actual cost of running the campaign versus the budget allocated for the campaign.

Creating Web-to-Lead Forms

You can create a Web-to-Lead form to capture leads from Web-based campaigns or other Web-based sources such as your Website. When campaign targets submit the form, it is saved as lead information in the Sugar database. You can use this lead information to generate more opportunities for your organization.

When you generate a Web-to-Lead form, it is saved to the cache/generated_forms folder, from where you can copy it to other locations. You can view and edit generated forms in the TinyMCE editor. Only administrators can add additional fields to the form.

To create a lead form

1. Select **Create Lead Form** from the **Actions** drop-down list on the **Campaigns** tab.

   This displays the Lead Form Wizard page.

2. Click and drag the desired fields from the **Available Fields** list to the **Leads Form** (**First Column)** or the **Leads Form** (**Second Column)** list.

   To move all the fields, click **Add All Fields**.

3. Click **Next**.

4. Enter information for the following fields:

   Form Header. The default header displays. You can delete it and enter the desired header information.

   Form Description. Enter a brief description of the form.

   Submit Button Label. The default label displays on the page. You can delete it and enter the desired label.

   Post URL. The default location where the lead information will be stored displays on the page. To edit this information, select the **Edit post URL?** box and then enter the new location.

   Redirect URL. Enter the URL to the page that you would like your leads to view after submitting their information. If you do not specify a URL, Sugar will display a "Thank you for your Submission" message.

   Related Campaign. Enter the name of the campaign that is related to this lead form. To select from the Campaigns list, click **Select**.

   Assigned to. Enter the name of the individual you want to assign to the record or click **Select** to choose from the User List. By default, this record is assigned to you.

   Team. Enter the name of the team that is allowed to access the form. To change the primary team assignment, enter the name of the new primary team.

   To assign additional teams to the record, click **Select**, and choose the team from the Team List, or click **Add** to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.

   Form footer. Enter the form footer, if needed.

5. Click **Generate Form**.

   This displays the form in the TinyMCE editor. Modify the form if needed and click **Save Web To Lead Form**.

6. To save the form, you can do one of the following:

   - Copy and paste the HTML from the box to a text file on your local machine.

     For On-Premise Sugar systems, the system saves it in the *cache/generated_forms* folder on the Sugar server. You can copy it from the cache to a different location.

   - To save the generated form as a .htm file on your local machine, you can right-click **Web to Lead Form**, open the page in a new tab, select **Save**

Page As from the browser's File menu and navigate to the location where you want to save it.

7. To view the form, click the **Web To Lead Form** link at the top of the page.

Performing a Mail Merge

You can create a form letter template for campaigns using the Sugar Plug-in for Microsoft Word and merge it with your target list to create personalized letters for each target. Typically, you perform a mail merge for non-email campaigns.

Note: You must purchase a license for Sugar Plug-in for Microsoft Word.

The process of performing a mail merge is as follows:

1. Ensure that your Administrator has enabled the Mail Merge option for your organization.
2. Ensure that you have enabled the Mail Merge option on your User Preferences page.
3. Define a template in Sugar Plug-in for Microsoft Word and upload it to Sugar.
4. In the Campaigns module, create a non-email campaign.
5. Create your target list and populate it with names and addresses from your list of contacts, leads, and targets. To notify your manager or other users, you can also add those individuals from the Users list.
6. Perform a mail merge to merge the target addresses with the campaign letter to create personalized letters.

To perform a mail merge

1. Click **Mail Merge** in the Campaign's Detail View page.

   This displays the **Step 1: Selected Module and Template** page. The Campaigns module is auto-selected in the **Selected Module** drop-down list.
2. Select the mail merge template from the **Select Template** drop-down list and click **Next**.

   Step 2 of the Mail Merge process displays on the page. The targets specified in your targets list display in the **Available** list.
3. Select the targets in the **Available** list and using the right arrow, move them to the **Selected** list.
4. Click **Next**.

   The final step of the Mail Merge process displays your selections for review. If you need to go back to the previous step to modify the target list, click **Back**.
5. Click **Begin Merge**.
6. Ensure that **Open with Word** is selected and click **OK**.

   The merged document displays on the page.

   The system creates a log entry for each target for your records. You can view these entries when you click the **View Status** option on the campaign's detail page. If you perform mail merge operations repeatedly for these campaign targets, the system updates these log entries.

Reports Module

Use the Reports module to create and manage reports on any module such as Accounts, Contracts, and Opportunities. You can also create reports to track user activity such as viewed modules, modified records, and so on.

The Reports list displays reports in the order that you viewed them, with the most recently viewed report at the top of the list. The date and time when you last viewed the report is displayed in the **Accessed On** column.

Administrators can view and edit reports regardless of team membership.

You can view charts in PDF format generated while viewing reports in an HTML5 browser.

Sugar provides several pre-defined reports. These are listed on the Reports List View. You can also create custom reports for your requirements. These include reports on forecasts, open cases, accounts, and usage metrics.Sugar also provides tracker reports. For more information see Viewing and Creating Tracker Reports. All existing reports are listed on the Reports Home page. You can click a report name to view its contents.

You can run a report immediately when you create it or you can schedule it at a later date. You can also schedule it to run at specific time intervals. For more information on scheduling, see Scheduling Reports.

You can also create a list of favorite reports that you frequently access. This allows you to group reports that may not share common searchable criteria.

You can view frequently used reports through Sugar Dashlets on your Home page. You can view a report with charts as a chart dashlet. To view reports without charts through a dashlet, you will need to add them to your list of favorite reports. For more information on dashlets, see Managing Sugar Dashlets.

You can search for an existing report using the Search panel on the Reports home page. The search panel allows you to search for reports by criteria such as a specific module, report type, report title, and so on. For more information, see Searching for Information in Sugar.

The Reports module tab displays options to view existing reports for specific modules.

Note: After upgrading to the latest version of Sugar, it is recommended that the administrator use the Repair-Check Reports functionality to ensure that existing reports are still valid after the upgrade.

Report Categories

Sugar provides two categories of reports: Standard reports and Advanced reports. Use the Report Wizard (a Sugar query builder) create a standard report. You can create several types of standard reports, as discussed in **Report Types**.

You can write complex SQL queries to create an advanced report. Only administrators can create Advanced Reports.

For information on creating standard reports, see Creating Standard Reports.

Report Types

The following types of reports are available in Sugar:

- Summation
- Summation with Details
- Rows and Columns
- Matrix

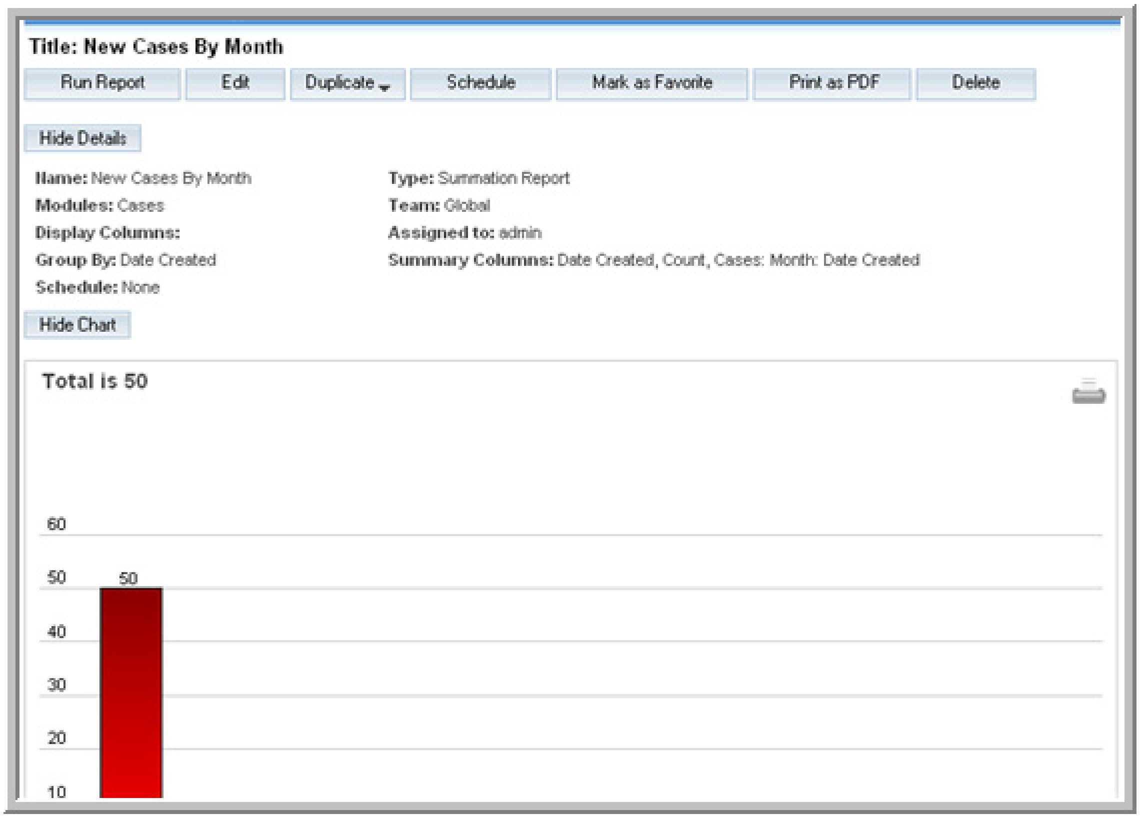
Summation reports

A summation report displays the computed data of records that match the specified criteria.

A summation report can group the summary data by a date range or by field values such as Type, Industry, Lead Source, and Sales Stage and display the total count. You can choose from an additional set of columns which display data values from records within the selected module if the report contains a grouping. These include computed derivatives from numeric-only data values such as SUM, AVG, MAX, MIN, and a weighted average.

Summation reports can be viewed in a chart format and displayed as a Sugar Dashlet on your Home page. You can click any segment of the chart to drill-down and view details such as sales by individual team members.

Example. The following is a pre-defined summation report to view the total number of cases created per month.



Summation Report with Details

In addition to the total count of records, this report enables you to group data and view more details related to the records in the report. The group-by data is visually represented in the report output. For example, you can group records by the assigned user and sort the results in ascending or descending order.

Example. The following report lists open cases by month, grouped by assigned user.

Date Created = July 2008 , Count = 32		
User Name = chris, Cases: Month: Date Created = 5, Assigned to User: User Name = July 2008		
Cases: Number	**Cases: Subject**	**Account: Name**
41	System is Performing Too Fast	Green Tractor Group Limited 825259
29	Warning message when using the wrong browser	A.D. Arts & Crafts Inc 203703
5	Warning message when using the wrong browser	Kitty Kat Inc 247718
35	Need assistance with large customization	A 99 Capital Inc 39663
38	Need to Purchase Additional Licenses	L Smith & Daughters 40429
User Name = max, Cases: Month: Date Created = 6, Assigned to User: User Name = July 2008		
Cases: Number	**Cases: Subject**	**Account: Name**
48	Need to Purchase Additional Licenses	DD Furniture Inc 998725
46	System is Performing Too Fast	T-Cat Media Group Inc 300748
25	Having Trouble Plugging It In	MISSISSIPPI BANKS 565649
1	Warning message when using the wrong browser	SuperG Tech 737348
42	Warning message when using the wrong browser	P Piper & Sons 365688
21	Need assistance with large customization	Tri-State Medical Corp 290980
User Name = sally, Cases: Month: Date Created = 10, Assigned to User: User Name = July 2008		
Cases: Number	**Cases: Subject**	**Account: Name**
45	System is Performing Too Fast	SuperG Tech 322309
19	Need to Purchase Additional Licenses	Tri-State Medical Corp 786319
18	Having Trouble Plugging It In	T-SQUARED TECHS 318331

Rows and Columns Reports

A Rows and Column report displays data in rows and columns that reflect the value of selected fields such as Name and Address.

Example. The following report lists details of customer accounts along with the user assigned to each account.

Title: Customer Account List

Run Report | Edit | Duplicate | Schedule | Mark as Favorite | Print as PDF | Export | Delete

Hide Details

Name: Customer Account List
Modules: Accounts, Accounts > Accounts, Accounts > Teams, Accounts > Users
Display Columns: Account Name, Website, Phone Office, Description, Type, Assigned to
Schedule: None

Type: Rows and Columns Report
Team: Global
Assigned to: admin

(1 - 50 of 50)

Account Name	Website	Phone Office	Description	Type	Assigned to
Q.R.&E. Corp 706109	www.infosupport.tv	(217) 418-4031		Customer	Chris Olliver
Trait Institute Inc 855690	www.salessales.cn	(916) 632-9318		Customer	Chris Olliver
COMPLETE HLDNG 448599	www.hrim.co.jp	(979) 879-1306		Customer	Chris Olliver
MTM Investment Bank F S B 785812	www.supportsupport.com	(444) 024-2648		Customer	Chris Olliver
Pullman Cart Company 989768	www.sugarsupport.co.jp	(295) 467-0118		Customer	Chris Olliver

Matrix Reports

Matrix reports are similar to summation reports but unlike summation reports, a matrix report displays results in a grid format. The report displays totals for all summaries. You can use a maximum of three group-by columns to group the data. You can also choose a layout option to view the report results.

Example. The following report groups opportunities by type, sales stage, and assigned user.

This report contains data in following column orders: Count,SUM: Amount,SUM: Probability (%)

Type	Sales Stage															
	Value Proposition			Negotiation Review			Prospecting			Qualification			Id. Decision Makers			
	User Name			User Name			User Name			User Name			User Name			
	chris	max	Total	chris	max	Total	chris	max	Total	chris	max	Total	chris	max	Total	chri
Existing Business	1		1	1		1										
	$75,000.00		$75,000.00	$10,000.00		$10,000.00										
	70		70	40		40										
New Business							1	1	2		1	1	1	2	3	1
							$25,000.00	$75,000.00	$100,000.00		$25,000.00	$25,000.00	$75,000.00	$35,000.00	$110,000.00	$25,00
							70	40	110		10	10	40	50	90	10
Grand Total	1		1	1		1	1	1	2		1	1	1	2	3	1
	$75,000.00		$75,000.00	$10,000.00		$10,000.00	$25,000.00	$75,000.00	$100,000.00		$25,000.00	$25,000.00	$75,000.00	$35,000.00	$110,000.00	$25,00
	70		70	40		40	70	40	110		10	10	40	50	90	10

Creating Standard Reports

You create a report in the Report Wizard and run it in the Report Viewer.

Follow the steps below to create a standard report:

1. Select Create Report from the **Actions** drop-down list in the Reports tab.

   This activates the Report Wizard and displays the Report Type page.
2. Select a report type.
3. Select a module.

   This displays the Define Filters page.
4. Select one or more fields as filters from the listed related modules.
5. Select the group-by fields that you would like to use to group records for Summation, Summation with Details, and Matrix reports. You can select fields from more than one module. You can use a maximum of three fields to group records in matrix reports.
6. Select a chart type for a Summation, Summation with Details, and Matrix reports (optional).

   Select the display columns for Summation with Details and Row and Columns reports.
7. Save the report and run it at a later date, or run it immediately. You can also preview the report before you save it.

Note: Clear the Reports cache to display custom fields in the list of available fields for filters and group-by columns in the Reports Wizard. Log out and log into Sugar to clear the cache.

Enter values at every step of the process listed above to proceed to the next step.

Setting Filters

Filters are fields, operators, and optionally, values (depending on the operator).

Use the **Add Filter Group** button to create filter groups. Create nested filter groups with a combination of AND and OR operators for complex queries with several filtering levels.

The choices for operators vary, depending on whether you have selected a text field, numeric field, or date field.

Operators for text fields can be **Is, Is Not, Equals, Does Not Equal, Contains, Does not Contain, Starts With, Ends With, and, Is Not One Of, Is Empty,** and **Is Not Empty.**

Operators for numeric fields can be any of the following: **Equals, Does Not Equal, Less Than, Greater Than, Is Between** (requires two numeric values)**, Is Empty, Is Not Empty.**

Operators for date fields can be any of the following: **On, Before, After, Is Between** (requires two date values)**, Not On, Is Empty, Is Not Empty, Yesterday, Today, Tomorrow, Last 7 Days, Next 7 Days, Last Month, This Month, Next Month, Last 30 days, Next 30 days, Last Year, This Year,** and **Next Year.**

Use the User Name field to run a report on one or more users. For example, you can run a report on all opportunities assigned to Chris, or to Chris and Will. Similarly, you can use the Team ID.

If the assigned user or a member of your team adds a new filter, the system alerts you of the change when you run the report

A dynamic filter called Current User is available in Sugar. The Current User is any user who is currently logged in and running the report. This filter enables you to create one report for multiple users. For example, you can create one report on all opportunities assigned to Current User. When a member of your team runs this report, the report results automatically reflect the member's assigned opportunities because the Current User is the person who is logged in and running the report.

You can filter by record and/or by user for reports on activities such as calls, meetings, and tasks. For example, you can run a report on meetings held in the last month regarding a specific case number or for all cases assigned to a specific user.

Sugar saves the report definition when you create and save a report. Only the assigned user or a member of the assigned team has the permission to change the report definition. If the report definition is modified, the system displays an alert when you try to run the report.

Run-time Filters. A Run-time option enables you to modify report filter values in the Report Viewer when you view the report. The Report Wizard retains the original filter values for the report, regardless of changes you or other users make to the run-time filters while viewing the report. Each user's run-time filter values are preserved for future use when they view the report again. This enables users to modify certain filters in a shared report without altering the original filter values. Users can click the Reset button to restore the original run-time values.

To create a Summation report

1. Select **Create Report** from the **Actions** drop-down list of the Reports tab.

   The Report Wizard page displays the various report types. After you select a report type, the Report Wizard guides you through the process of creating the report.
2. Click **Summation Report**.

   This displays a list of modules.
3. Select the module of your choice.

   This displays the **Define Fields** page with a list of **Related Modules** and **Available Fields** (in the primary module). You can use one or more fields as filters.
4. Click a field to select it as a filter in the **Field Name** pane.

   The field displays in the right pane.
5. Set all the report filters and select the operator from the drop-down list above.

   To set a level one filter, select the module from the **Related Modules** list and then select the field from the **Available Fields** drop-down list.

   To set a level two filter, click **Add Filter Group** and then select the field from the **Available Fields** drop-down list. Ensure that you add the field to the correct filter level.

   The tracker bar at the top of the page allows you to navigate back and forth within the Report Wizard and indicates where you are within the Wizard.
6. Select the **Run-time** box to apply the filter values only at the time of running the report.
7. Click **Next** to define **Group By** columns.
8. Select the module from the **Related Modules** column.
9. Select one or more fields from the **Available Fields** drop-down list to group-by columns.

   You must group by day, month, quarter, or year if you select a date field.
10. Click **Next.**

    This displays the **Display Summaries** page. To sort data by a column, click the **Sort By** radio button that is adjacent to the column name.
11. Select **Count** as one of the columns from the **Available Fields** drop-down list. The **Group By** columns selected in the previous step is displayed as selected.

Select the corresponding **Sort By** radio button, and select either **Ascending** order or **Descending** order to display a specific summary column first.

12. Click **Next** to view the chart options.

    For more information on creating a chart, see Creating Report Charts.

13. Click **Next** to view the **Report Details** page.
14. Enter a name for the report.
15. Select **Show Query** if you want to display the SQL query when you run the report.
16. Click **Select** in the **Assigned to** field to choose the user you want to assign to manage the report.

    Enter the name of the new primary team in the **Team** field to change the primary team assignment.

    To assign additional teams to the record, click **Select**, and choose the team from the Team List, or click **Add** to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.

17. Select **Optional Related Modules** to display records from the primary module even when there are no records from the related modules. When this option is not selected, primary module records will display only if the related module records exist.
18. To preview the report results before saving it, click **Preview**.
19. To navigate back to a specific step in the report building process to view or edit the criteria, click **Back**.
20. To save the report and run it at a later date, click **Save**.

    To save and run the report immediately, click **Save and Run**; to exit the page without saving the report, click **Cancel**.

    The report results display on the page when you run the report. To sort the columns in ascending or descending order, click the arrows located next to the column names.

    When you specify a chart, it displays above the tabular data. Place the cursor on a segment to view the associated data.

To create a Summation with Details report

1. In the Report Wizard, select Summation with Details.
2. Follow the process outlined in To create a Summation report to define filters, Group By columns, and Display Summary columns.
3. Click **Next** to choose the Display Columns.

    Select the appropriate **Order By** button to order the report output by the corresponding column. Order the data in ascending order or descending order based on the columns chosen.

    The report results are grouped according to the specified display columns and order.

4. Click **Next** and, optionally, select a chart type.
5. Click **Next.**

   This displays the **Report Details** page and enter details like the report name and the assigned user name.
6. Click **Save** to generate the report without running it; click **Save & Run** to generate the report and run it.

To create a matrix report

1. Click **Create Report** on the Reports Home page, and select **Matrix**.
2. Follow the process outlined in To create a Summation report to create the report.

   For matrix reports, you can select a maximum of three group-by columns. When you specify three group-by columns, you can select from two layout options to display the results: 1x2 and 2x1. With the 1x2 layout option, the data for the first group-by field displays in a row and the data for the other two group-by fields displays in columns. With the 2x1 layout option, the data for the first two group-by fields display in rows and the data for the third group-by field displays in a column.

   If you have only two group-by columns, you can change the layout by dragging and dropping the group-by fields to a different order in the **Define Group By** page.

To create a Row and Column report

1. Click **Create Report** in the **Reports** home page.
2. Select **Rows and Columns Report**.
3. Select the module of your choice.
4. Define filters as described in To create a Summation report.
5. Click **Next** and select the desired fields from the Related Modules list as the Display Columns as described in To create a Summation with Details report.
6. Click **Next** to move to the Report Details page and enter details like the report name and assigned user.
7. Click **Save** to generate the report without running it; click **Save & Run** to generate the report and run it.

Creating Report Charts

Sugar enables you to view a summation, summation with details, and matrix report as a chart with the legend and details below. You can create a horizontal bar chart, vertical bar chart, line chart, pie chart, and funnel chart.

You must specify at least one Group By column and one Summary column to render a chart.

To create a chart

1. Enter the following information on the Chart Options page of the Report Wizard when creating a summation or a matrix report:
   - **Chart Type**. Select a type from this drop-down list, such as Horizontal or Vertical.
   - **Data Series**. Select an available grouping function from the drop-down list, such as Count, AVG, MIN, MAX. The values displayed in this drop-down list depend on the selected group-by options and display columns options.
   - **Description**. Enter a brief description of the chart.
   - **Round Numbers Over 100000**. Numbers over 100000 will be rounded in charts. For example, 350000 will be expressed as 350K. By default, this option is enabled. To disable this option, uncheck the box.
2. Click **Next** to enter a name for the report and generate it.

   This chart can be added as a Sugar Dashlet on your Home page. For more information, see To add Sugar Dashlets.
3. To hide the legend, click the down arrow.
4. To view a segment amount as a percentage, place the cursor on it; click to drill down to the data.

Note: Line charts and Pie charts are not available for reports with multiple groupings.

For more information to creating charts, see To create a chart.

Editing and Managing Reports

When you save a report, it is added to the list on the Reports Home page. Users can view, run, edit, schedule, and delete reports.

- To edit the report details, click **Edit**; to run the updated report, click **Save and Run**.
- To schedule a report to run, click **Schedule** from the Detail View. For more information, see Scheduling Reports.
- To duplicate the report, click Duplicate in the Detail View and follow the steps described in **To duplicate a report**.
- To add one or more reports to your list of frequently viewed reports, click the star next to the report name on the List View and identify it as a favorite or click the star on the report's Detail View.
- To print the report in PDF format, click **Print as PDF**. Specify whether you want to open it with an application such as Adobe Acrobat or save it on your local machine.
- To delete one or more reports listed on the **Reports** home page, select them in the List View and click **Delete**. Or click **Delete** in the report's Detail View.

To duplicate a report

1. Click **Duplicate** on the report's Detail View page.
2. Select from the **Duplicate** drop-down list to retain the original report type or change it to a different type.

   The filters in the original report are copied to the new report.

Note: You cannot save a Summation or a Summation with Details report with more than three group-by columns as a Matrix report.

3. Edit the new report as needed.
4. Rename the report and save it.

Viewing and Creating Tracker Reports

A tracker displays recently accessed records in the Last Viewed list below the module tabs. Trackers also enable users to navigate back and forth between previously accessed records.

Tracker reports provide administrators and supervisors visibility in user actions and system performance. These reports display user actions such as records views and other page views such as records saves. For example, you can run a report on the number of modules a specific user accessed on a particular day and the actions performed in those modules. Trackers allow users to keep track of records that they access during their current session.

The data viewed in a Tracker report depends on team membership. When viewing tracker reports on user activity, you can only view your own data and data for users who report to you. For example, supervisors can view their own activities as well as the activities of their subordinates. Administrators can track activities for everybody.

The administrator must assign the Tracker role to a user to enable the user to view tracker data and create tracker reports.

Tracker reports are broadly classified into the following types:

- Trackers
- Tracker Queries
- Tracker Sessions
- Tracker Performance

Trackers: This report tracks all page requests from users displays the following information:

Columns	Description
Action	Pages viewed and records saved
Date of Last Action	The date and time when the action was performed
Item ID	The record ID

Columns	Description
Item Summary	The record name or description
Session ID	The ID assigned to the session
Team ID	The ID of the user's private team
User ID	The ID of the user who performed the action
Record Visible	If set to True, the records display as breadcrumbs
Monitor ID	Related Tracker Performance information

Tracker Queries: This report tracks queries that exceed the slow query time limit and displays the following information:

Columns	Description
Date Last Run	The date when a particular query that was over the threshold was last run
Query Count	Number of times the query was run
SQL Text	The pattern of a particular SQL statement
Average Seconds	The average time taken to run the query
Total Seconds	The cumulative time taken to run the query. That is, if a query was run more than once, the cumulative time reflects the total of all the query runs.

Tracker Sessions: This report tracks user access session data and displays the following information:

Columns	Description
Session Active	If set to True, an action has been tracked for the user within the last 20 minutes. An active user is defined as a user that has taken action w/in
Date Start	The date that the session started. That is, when the first action was tracked.
Date of Last Action	The date and time that the last recorded trackable action occurred.
Action Count	The number of trackable actions
Seconds Active	The total number of seconds between the Date Start (login) and Date of Last Action

Columns	Description
Session ID	The ID assigned to the session. If a user starts another session without logging out of an existing session, a new session ID is assigned to the user, and the new session is marked as Active (Active = True).
Client IP Address	The IP Address of the client.
User ID	The ID of the user who performed the action
Record Visible	If set to True, the records display as breadcrumbs
Monitor ID	Related Tracker Performance information

Tracker Performance: This report tracks performance-related information and displays the following information:

Columns	Description
Date of Last Action	The date and time that an action was performed.
Database Roundtrips	The number of database calls that the action involved.
Files Accessed	The number of php files used to perform the action.
Memory Usage	The amount of memory used, in bytes, to perform the action
Server Response Time	The time, in seconds, taken by the server to respond.

Sugar provides several pre-defined reports. You cannot edit these reports. Some of the pre-defined reports, based on the most frequently used queries such as module usage, are available through the Tracker tab on your Home page. Other pre-defined reports, listed below, are available through the Reports module. You need access permissions from the administrator to view the Tracker tab and to run and create tracker reports.

- My Usage Metrics: This report displays the cumulative sum for the server response time (in seconds), total database round trips and total files opened by the user for a specified time period such as a day, week, or month.
- My Module Usage: This report displays the cumulative sum for each module you accessed for a specified time period such as a day, week, or month.
- Slow Queries: This query report lists SQL queries that were slow to execute and the time taken for execution.
- Users Usage Metrics: This sessions report lists the cumulative sum for the server response time (in seconds), total database round trips, and total files opened by the user.
- My Records Modified: This report lists the modules that were modified in the past week.

- My Recently Modified Records: This report displays recently modified modules.
- Modules Used by My Direct Reports: This report displays the cumulative sum of each module used during the last 30 days by your direct reports. Modules that each reportee used are grouped together and presented in a separate horizontal bar.
- Records Modified by My Direct Reports: This report displays the modules in which your direct reports recently modified records.
- Active User Sessions: This report displays active sessions for a specific user during the last seven days.
- User Sessions: This report displays active sessions for all users during the last seven days.

To create a tracker report

1. Click **Create Report** on the Reports tab.
2. Select the report type such as Summation or Matrix on the **Report Wizard** page.
3. Select the Tracker Report type of your choice and follow the process described in Creating Standard Reports.

Scheduling Reports

You can schedule to run a report at periodic intervals. Sugar runs the report at the specified intervals and emails it to you as a PDF file.

To schedule a report

1. Navigate to the List View of **Reports**.
2. Click **--none--**in the **Schedule Report** column for any report in the list.

   This displays the **Schedule Report** dialog box.
3. Enter values for the following fields in the **Schedule Report** dialog box:

   Start Date. Click the **Calendar** icon and select a date to begin scheduling the report. You can specify the time in hours and minutes from the adjacent drop-down fields.

   Time Interval. Select intervals at which the report runs and the output is received, from this drop-down list.

   Active. Check this box to activate the schedule. The date and time of the next email is now displayed in the **Schedule Report** column. If you do not check this box, the schedule is not activated and the **Schedule Report** column displays **--none--**.

   Next Email. The date and time that you specified displays in this field. This is the time when the report is emailed to you.
4. Click **Update Schedule**.

   Sugar schedules the report at the specified time and emails the PDF file.

Quotes Module

Use the Quotes module to view and manage quotes for your organization. Quotes specify the quantity and the price per unit for products and services that you offer a customer.

Creating Quotes

When you create a quote, you can select a product from the product catalog, or you can manually enter information related to a product that is not in the catalog. When you select from the catalog, Sugar fills in information such as the manufacturer's number and tax class. You can also list individual line items in a quote. To do this, you will need to first add one or more product groups and group line items under the appropriate product group. You cannot modify pricing of line items from the product catalog but you can modify pricing of line items that you manually enter into the system.

Each quote line item creates a product record in the **Products** module, and any change to a status of a quote is reflected in the associated product record. For example, when the status of a quote changes to **Closed Accepted**, the product record's status changes to **Ordered**.

To create a quote

1. Select **Create Quote** from the **Actions** drop-down list on the **Quotes** tab.

   Or, click the Create icon on any page of the **Quotes** module.

   You can also create quotes from the Detail View of an account, contact, or opportunity.

2. Enter information for the following fields on the **Quotes** page:

   Quote Subject. Enter information on the product or service for which you are creating the quote.

   Quote Number. Sugar generates a reference number after you save the quote.

   Purchase Order Num. Enter the purchase order number if one exists.

   Payment Terms. Select the time period within which the customer must pay for the product or service purchased, from this drop-down list.

   Opportunity Name. Select the opportunity that resulted in this quote from this drop-down list.

   Quote Stage. Select the current stage of the quote's life cycle, such as **Draft** or **Confirmed**, from this drop-down list.

Note: You cannot use a custom Stage drop-down list to create a quote.

Valid Until. Click the **Calendar** icon and select the date until which the quote is valid. The quote expires after the selected date has passed.

Original P.O. Date. Click the **Calendar** icon and select the date of the original Purchase Order.

Bill to section. Enter the billing and shipping account names and contact names. You can also click **Select** to choose from the list of existing accounts and contacts.

Address Information section. Sugar automatically populates the address of the selected account. You can modify the address if necessary.

Other section, specify the following information:

Teams. By default, the quote is assigned to the private team of the user who creates the quote. To change the assigned primary team, enter the name of the new team. To assign additional teams to the record, click **Select**, and choose the team from the Team List, or click **Add** to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.

Assigned to. Enter the name of the individual you want to assign to the record or click **Select** to choose from the **Users** list. By default, this record is assigned to you.

Line Items section. Sugar displays the default currency and tax rate. Select the currency from the **Currency** drop-down list if what is used in the quote is different from the default. Select the appropriate tax rate for the state from the **Tax Rate** drop-down list.

To enter line items, click **Add Group** and select or enter one or more products or services for the quote. Input the following details:

Group Name. Name for the product group.

Group Stage. Select the current status of the group such as **Draft** or **Negotiation** from this drop-down list.

Add Row. Click this button to add a line item to the group. For more information, see To add a line item to a product group. To delete a line item, click **Remove Row**.

Add Comment. Click this button to add a comment on the group.

Shipping Provider. Select a shipping provider to deliver the product to the customer from this drop-down list.

Note: The administrator specifies the currency, tax rate, and shipping provider information that display in the drop-down lists.

Display Grand Total. Check this box to display the total sum of the products listed in the quote.

Display Line Numbers. Check this box to display line numbers when you save the quote in PDF format.

Description section. Enter a brief description for the quote. This is optional.

Delete Group. Click this button to delete the group.

Click **Add Group** to add another group.

3. Click **Save** to create the new quote; click **Cancel** to return to the **Quotes** home page without creating the new quote.

   After you save the quote, the system displays the Quote's Detail View page. You can print or email the quote as a PDF file from this page. For more information, see To manage quotes and To email a quote.

To add a line item to a product group

Add a product group as listed in the instructions above and follow the steps listed below:

1. Click **Add Row**.

   This displays fields to specify the item information. You can click **Add Row** again to add another item.

   Enter the following information:

   Quantity. Total number of units for this product.

   Product. To manually add a product, enter the product name. To select from the Product Catalog, click **Select** (located next to the Product field) and then choose the item from the Product Catalog List View. This adds the product as a line item in the quote.

   Mft Num. Manufacturer's number, if any. If you selected an item from the catalog, the system automatically enters the appropriate number in this field.

   Tax Class. Specify whether the product is **taxable** or **non-taxable**. If you selected an item from the catalog, the system automatically enters the appropriate information in this field.

   Cost. Actual cost of the item. If you selected an item from the catalog, this field is system-populated.

   Note: The Cost details do not display in the quote that you email customers. For information on mailing quotes, see To email a quote.

   List. List price for the product. If you selected an item from the catalog, this field is system-populated.

   Unit Price. Price offered to the customer. This may be lower than the list price.

   Discount. Dollar amount or the percentage of the unit price, if a discount is applicable. Check the % checkbox if you entered a percentage.

   Sugar calculates and displays the subtotal, discount, tax, shipping and the final billing amount.

   You can click **Remove Row** to delete an item from the quote; click **OK** to confirm the deletion.

Managing Quotes

Managing quotes includes tasks such as editing, deleting, and tracking changes.

To manage quotes

- To sort a list view, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To view the details of a quote, click its name in the List View page.
- To edit the quote, on the Detail View page, click **Edit**.
- To update or delete all or some of the quotes in the list, use the **Mass Update** link in the **Actions** drop-down list in the List View page. For details, see To edit or delete multiple records.
- To duplicate a quote, click **Duplicate** on the Detail View page. Duplication is a convenient way of creating a similar quote. You can change the information in the duplicate record to create a new quote.
- To delete a quote, click **Delete** on the Detail View page.
- To track changes made to a quote over time, click the **View Change Log** link on the Detail View page.
- To manage records in a sub-panel, see To manage related information in sub-panels.
- To archive a related email, in the Detail View, scroll down to the **History** sub-panel where related emails are listed and click **Archive Email** to view the **Create Archived Email** form. You can copy and paste information related to the email into this form and save it for your records.
- To create a new opportunity for a quote, click **Create Opportunity from Quote** on the Detail View page.

  Create a new opportunity related to the quote when you renew an expired quote. This ensures that any opportunity-based forecast reflects the new quote.
- To attach an external file to the quote, click **Create Note or Attachment** in the History sub-panel.
  - To add a note, enter the subject and the text, and click **Save**.
  - To add an attachment, click the **Browse** button located next to the Attachment field, and navigate to the file location on your local machine.

  The attached file is listed in the History sub-panel on the Quote Detail View page.
- To email the quote in PDF format, click **Email as PDF**.
- To print the quote in PDF format, click **Print as PDF**. By default, the system prints a proposal. To print an invoice, select **Invoice** from the **PDF Format** drop-down list and click **Print as PDF**.

Emailing Quotes

You can generate a PDF document of a quote and email it to the customers directly from the Quotes Detail View.

Note: The administrator must configure your email settings to enable you to send emails.

Check the following settings on your User Preferences page before you generate the PDF:

- Appropriate main font size and data font size in the PDF Settings section is selected.

  For other languages such as Japanese, the administrator will have to create the appropriate font as described in PDF.

- Appropriate character set is selected in the **Import/Export Character Set** drop-down list in the **User Preferences** section.

  On Microsoft Windows, if you are using USD or Western European fonts, you can select ISO-8859-1 (Western European and US) or CP 1252. The default character set in Sugar is UTF 8.

To email a quote

1. Verify that the quote specifies a contact with a valid email address.
2. Click **E-mail as PDF** on the quote's Detail View page.

   Sugar creates a PDF file and attaches it to an outbound email populated with the recipient's email address. The quote omits the Cost (price) but displays the **List Price, Unit Price**, and the **Ext Price** (Extended Price). Sugar generates a standard title in the Subject field and a standard message in the Body field; you can edit these if needed.

   A reference to this email is displayed in the **History** sub-panel in the **Quotes** module and the **Contacts** module. For more information on emailing documents, see Emails Module.
3. Click **Send** to email the quote.

Cases Module

Use the **Cases** module to track and manage products- or services-releated problems reported by your users and customers.

After you create a case, you can associate it with related bugs. Sugar provides several pre-defined Case reports for your use. You can edit these reports to suit your needs. For more information on running reports, see Reports Module.

Creating Cases

You can create cases in Sugar and you can also import them into Sugar as a comma-delimited, tab-delimited, or custom delimited file. To import cases, select **Import Cases** from the Cases tab**Actions**drop-down list. For more information on importing data, see Importing Data.

To create a case

Follow the steps listed below to create a case:

1. Select **Create Case**from the **Actions** drop-down list on the **Cases** tab

   or, Click the Create icon on any page within the **Cases** module.

1. Enter information in the following fields on the **Cases** page:

   Priority. Specify the urgency of the problem from this drop-down list.

   Status. Specify the current status of the problem, such as **New** or **Closed**, from this drop-down list.

   Type. Select Administration, User, or Product from this drop-down list if you want to categorize the case.

   Subject. Brief statement of the problem.

   Account Name. Name of associated account or click **Select** to choose the account.

   Description. Description of the problem.

   Resolution. Results of the investigation into the problem.

   Specify the following information in the **Other** section:

   Teams. To change the primary team assignment, enter the name of the new primary team. To assign additional teams to the record, click **Select**, and choose the team from the Team List, or click **Add** to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.

Assigned to. Name of the individual you want to assign to the record or click **Select** to choose from the User List. By default, this record is assigned to you.

Case owners receive an email whenever a case is assigned to them if the administrator has enabled email notification.

Note: Only team members have permission to view the case, so ensure that case owners are members of the appropriate teams.

2. Click **Save** to save the case; click **Cancel** to exit the page without saving the case.

   This displays the Case Detail View page. Create new bugs for the case or associate it with existing bugs on this page. For more information on creating bugs, see To create a bug. You can also associate the case with new or existing records such as contacts and activities.

Managing Cases

Managing cases includes tasks such as editing, deleting, importing, and exporting records.

To manage cases

- To sort a list view, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To edit or delete information related to multiple accounts, select multiple records in the Cases List View and click the **Mass Update** link in the **Actions** drop-down list. For more information, see Editing and Deleting Multiple Records.
- To view the details of a case, on the **Cases** home page, click on the case name in the list. This displays the Detail View page.
- To edit the case details, click **Edit** on the Cases Detail View, update the information, and click **Save**.
- To view or run a Case report, select **View Case Reports** from the **Actions** drop-down list in **Cases** tab and select the report from the Report List. For information on running reports, see Reports Module.
- To import records, select **Import Cases** from the **Actions** drop-down list on the **Cases** tab. For more information on importing data, see Importing Data.
- To export information on one or more cases, select them in the Case List sub-panel on the Cases Home (List View) page, click the **Export** ink in the **Actions** drop-down list, and export them as described in Exporting Data.
- To merge duplicates, select the records from the **Cases** List View, click the **Merge** link from the **Actions** drop-down list, and follow the process described in Merging Duplicate Records.
- To duplicate a case, click **Duplicate** on the **Cases** Detail View page. Duplication is a convenient way of creating a similar case. You can modify the information in the duplicate record to create a new case.
- To find duplicates, click **Find Duplicates** on the Detail View page.

- To create an article, click **Create Article** on the **Cases** Detail View page. Existing articles are listed in the **Articles** sub-panel on the **Cases** Detail View. For more information on creating articles, see Knowledge Base Module.
- To delete a case, click **Delete** on the Detail View page.
- To track changes to the case over time, click **View Change Log** on the Detail View page.
- To create or edit related records in a sub-panel, see To manage related information in sub-panels.
- To archive a related email,, scroll down to the **History** sub-panel in the Detail View, where related emails are listed, click **Archive Email.** This displays the **Create Archived Emails** page. Copy and paste information related to the email into this page and save it for your records.

Bug Tracker Module

Use the Bug Tracker module to report, track, and manage product bugs.

Bugs are defects or features associated with a particular revision of a product. The administrator populates the drop-down list of product releases. After you create a bug, you can associate it with the related case.

Note: This module is hidden by default. The administrator must display it for your use.

Creating Bugs

You can create a bug in Sugar, or import them into Sugar as a comma-delimited, tab-delimited, or custom delimited file.

To create a bug

Follow the steps listed below to create a bug:

1. Select **Report Bug** from the **Actions** drop-down list on the **Bug Tracker** tab.
2. Enter information for the following fields in the **Create** (Bug) page:

   Subject. Enter a brief statement of the problem.

   Priority. Specify the urgency of the problem in this drop-down list.

   Source. Specify whether the bug was reported by an internal user (internal), external user through email (email), through your organization's website (web), or by an external developer community member on your organization's forum (forum).

   Category. Select the product associated with the bug from this drop-down list.

   Found in Release. Select product version in which the bug was found from this drop-down list.

   Type. Select **Defect** from this drop-down list if the issue is a problem with the product. Select **Feature** if the issue is a suggested enhancement for the product.

   Status. Specify the current status of the problem such as **New** or **Closed** from this drop-down list.

   Resolution. Select the resolution to the bug from this drop-down list.

Fixed in Release. Select the product version in which the bug was fixed from this drop-down list.

Description. Description of the problem.

Work Log. Record your actions to resolve the bug.

Specify the following information in the **Other** section:

Assigned to. Enter the name of the individual you want to assign to the record or click **Select** to choose from the User List. By default, this record is assigned to you.

Teams. To change the primary team assignment, enter the name of the new primary team. To assign additional teams to the record, click **Select** to choose new teams from the Teams List, or click **Add** to add additional team fields and enter the team names. For more information on assigning teams, see Assigning Records to Users and Teams.

3. Click **Save** to create the bug; click **Cancel** to exit the page without creating the bug.

   This displays the Detail View page for the bug. Associate the bug with related records such as contacts and projects on this page. You can also create a new case for the bug or associate it with an existing case. For more information on creating cases, see Cases Module.

Sugar provides several pre-defined bug reports that you can edit, if required. For more information on running reports, see Reports Module.

Managing Bugs

Managing bugs includes tasks such as editing, deleting, importing, and exporting records.

To manage bugs

- To sort a List View, click any column title that has the icon beside it; to reverse the sort order, click the column title again.
- To edit or delete some or all the bugs, select **Mass Update** from the **Actions** drop-down list. For more information, see To edit or delete multiple records.
- To run a pre-defined bug report, select **View Bug Reports** from the **Actions** drop-down list in the Bug Tracker tab.
- To import records, click **Import Bugs** from the **Bug Tracker** tab**Actions**drop-down list. For more information on importing data, see Importing Data.
- To export records, select them from the list, click the **Export** link from the **Actions** drop-down list and follow the process described in Exporting Data.
- To merge duplicates, click the **Merge** link from the **Actions** drop-down list and following the process described in Merging Duplicate Records.
- To view the details of a bug, click the bug in the **Subject** column on the **Bug Tracker** home page (List View).
- To edit the bug details, click **Edit** on the Detail View page.

- To duplicate a bug, click **Duplicate** on the Detail View page. Duplication is a convenient way of creating a similar bug. You can change the information in the duplicate record to create a new bug.
- To delete a bug, click **Delete** on the Detail View page.
- To track changes made to the bug over time, click **View Change Log** in the Detail View page.
- To export information on one or more bugs, select them from the List View, click **Export** from the **Actions** drop-down list, and export them, following the instructions in To export data from Sugar.
- To create or manage related records in a sub-panel, see To manage related information in sub-panels.
- To archive a related email, scroll down to the **History** sub-panel in the Detail View where related emails are listed and click **Archive Email**. This displays the **Create Archived Email** form. Copy-paste information related to the email into this form to save it for your records.

Knowledge Base Module

Use this module to create, publish, and search for articles within Sugar.

Note: This module is hidden by default. The administrator must list this as a Displayed Tab for your access and use.

Creating Articles

Sugar enables you to create articles on any subject such as case resolutions and FAQs (Frequently Asked Questions) for Sugar users as well as Sugar Portal users. You can embed the contents of a file into an article, or attach the file to the article. All articles are stored in the Sugar database.

You can create two types of articles:

Internal: These articles are only available to Sugar users.

External: These articles are available to Sugar users as well as Sugar Portal users.

An article is assigned to one or more teams. Only team members can access and manage the article. If you are the creator of an article, by default you are assigned both as its author and its primary team. You can assign a different primary team and author. You can also assign additional teams to the article. Since only members of the assigned teams can access the article, the author needs to be a member of an assigned team in order to access and manage the article.

You can specify one of the following statuses for an article:

- **Draft**: The article is still undergoing changes.
- **Expired**: The article is outdated.
- **In Review**: The article is being reviewed by the designated approver.
- **Published**: The article has been approved and is available to the assigned teams. External articles that are published can also be viewed in Sugar Portal.

You can publish an article to make it available to users, or you can assign a reviewer to approve and publish it. If you specify an approver, the system sends an email notification of the pending review to that individual. After the approver has reviewed and published the article, the author receives an email notification of the publication.

Users can search or browse for articles. You can specify an expiration date if you want the article to be available only for a certain length of time. Expired articles do not display in search results or in Sugar Portal.

You can also create articles from a case. This is designed for situations, for example, where a user has documented a case resolution. Creating an article from such records enables the user to share the information with other users without copying or duplicating the information.

Tagging Articles

Tags are similar to folders. They enable you to categorize articles according to specific criteria, such as a topic, to locate the ones that you want. When you tag an article, the system creates a link between the tag and the article which resides in the Sugar database. An article can be linked with more than one tag. Similarly, a tag can be linked with multiple articles.

Tags can be root tags or sub-tags. Root tags are standalone tags. Sub-tags are tags that are nested within root tags.

When you browse for an article, the system displays existing tags in a hierarchical manner. When you select a tag, a list of documents residing within that tag display in the right panel. To view all the tags associated with an article, open the article's Detail View.

All tags are visible to all users. When you browse or search through tags, the system displays only those articles that you are authorized to access through your team memberships.

When you create an article, you can create a new tag for it or select an existing one.

Deleting Tags. Only empty tags can be deleted. Only administrators can delete tags because they can view all the articles associated with a tag. Users need the appropriate team memberships to view articles.

To create an article

1. Select **Create Article** from the **Actions** drop-down list in the **Knowledge Base** tab or click the Create link on any page within the **Knowledge Base** module.

   To create an article from a case, click **Create Article** in the case's Detail View.

   This displays the **Create** (article) page. When you create an article from a case, the system auto-populates article details such as title, subject, and body with information extracted from that record.

2. Input information for the following fields:

   Title. Enter the title of the article.

   External Article. Select this box to make the article available to Sugar and Sugar Portal users. By default, external articles are assigned to the Global team to ensure that they display in Sugar Portal.

   Revision. Enter the article's revision number. Typically, the revision number of a new article is #1.

   Status. Select the current status of the article from this drop-down list. To make the article available for viewing, the status must be set to **Published**.

   Teams. Select the name of the new primary team from this drop-down list to change the primary team assignment.

To assign additional teams to the record, click **Select**, and choose the team from the Team List, or click **Add** to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.

Author. You are the assigned author by default. You can also click **Select** and choose a different user from the **Users** list.

An author who is not a team member will not be able to access the article.

Approver. The administrator is the reviewer by default. You can also click **Select** and choose a different reviewer from the **Users** list.

Expiration Date. You can enter an expiration date for the article. This is optional. The article will not display in search results after the expiration date. External articles will not display in Sugar Portal after the expiration date.

Tags. Click the Tags **Select** button to link the article with a new or existing tag.

This displays the Tags window. Click a tag to link it with the article. The article is now linked to the selected tag, which displays below the **Select** (Tags) button in the Article's Edit View.

To delink the article from the tab, click the **Delete** icon next to the tag name.

For information on creating a tag, see To create a tag or to search for a tag.

3. Enter the text of the article in the Body field. To use the HTML editor, click the **HTML** link in the toolbar.
4. To attach a file to the article, enter the path to the file in the **Attachments** field or click **Browse** to navigate to the location of the file and select it.
5. To embed an image, enter the path to the file in the **Embedded Images** field or click **Browse** to navigate to the location of the file and select it.
6. Click **Save** to save the article; click **Cancel** to exit the page without creating the article.

   This displays the article's Detail View.

To create a tag or to search for a tag

1. Click the Tags'**Select** button in the article's Edit View.

   This displays the **Tags** dialog box. A list of existing root tags displays under Tags. A root tag can contain one or more sub-tags.
2. To search for an existing tag, enter its name in the **Search** field and click **Search**.
3. To create a new tag, click **Create New Tag**.

   The system prompts you to select a parent tag.
4. To create a root tag, select the **Tags**. To create a sub-tag, select a root tag or a sub-tag.

   A text field displays above.
5. Enter a name for the new tag.
6. Click **Save** to create the tag; click **Cancel** to exit the window without creating the tag.

New root tags are listed under Tags. New sub-tags are nested within the parent tag.

To manage articles

- To edit an article, on the article's detail page click **Edit**, make the changes, and click **Save**.
- To duplicate an article, on the article's detail page click **Duplicate**. You can then edit the duplicate copy as needed and save it as a different article.
- To delete an article, on the article's detail page click **Delete**.
- To email an article to a contact, on the article's detail page, click **Send Email**, select the contact, and click **Send**.

Searching for Articles

Browse through tagged articles, or can use filters such as keywords, tags, and title to search for articles.

Since each article is assigned to at least one team, the search results list articles that you are allowed to access based on your team membership.

When you specify a keyword, the system performs a full text search of the article's contents for the keyword. You can use keywords to include or exclude articles in the search results.

Click the Syntax Help link for guidance on syntax. Note that the syntax for full-text search varies depending on the type of database. See below for a list of guidelines on basic search rules:

- Search for keywords and phrases enabled. Keywords and phrases are not case-sensitive.
- Phrases must be enclosed in double quotes; for example, "the whole nine yards".
- Use spaces to specify multiple keywords. This is similar to using the OR operator. For example, if you search for *brown blue*, the search results return articles that contain brown or blue.
- Use the plus (+) sign to return articles that have both the words. For example, *brown + blue* returns only articles that contain both the words.
- Use the plus (+) sign before a word to included it in the search, u. For example, to find articles on the impact of global warming on polar bears, you can search for *"global warming" +bears* or *"global warming" +"polar bears"*.
- Use the minus (**-**) sign to exclude keywords or phrases. For example, *brown blue -yellow*. You do not need to use the minus sign if you specify the words in the **Excluding these words** field in **Advanced Search**.
- Use wildcard characters **%** or ***** to specify a partial word. For example, to find words that begin with *super*, you can search for *super%* or *super**.

Note: Words that contain a maximum of three letters are treated as stop words in MySQL, unless they are part of a phrase. Hence, the search results will not display articles containing such words.

To perform a full text search for an article

1. Click **View Articles** on the **Knowledge Base** tab.

   This displays the **Search** page.
2. Enter one or more keywords or a phrase in the **Search** field to find articles that contain the keywords or phrase.
3. Select a criterion from the **Search within** drop-down list to restrict the search.
4. Click **Search**.

To perform an advanced search

1. Click **View Articles** on the **Knowledge Base** tab.

   This displays the **Search** page.
2. Select the Advanced tab and specify one or more of the following criteria:

   Containing these words: Enter one or more keywords or phrases. Use a space to separate keywords from each other. Use quotes to enclose a phrase.

   Search within: Select the criterion such as a time period or a tag from this drop-down list.

   Excluding these words: Enter one or more keywords or phrases to exclude from the search. Use a space to separate keywords or phrases from each other.

   Note: Specify the keyword or phrase that you want to find in the **Containing these words** field to exclude a keyword or phrase.

   Using this Tag: Enter the tag name or click **Select** to choose the tag from the **Tags** list.

   Title. Enter the article's title.

   Viewing Frequency. Select the number of articles that were viewed most frequently or the least frequently from this drop-down list.

   Status. Select the article's status such as **Draft** or **Published** from this drop-down list.

   Team. Enter the name of the team or click **Select** to choose a team from the Teams list to search for articles assigned to a team.

   Note: The search results will not display any articles if you are not a member of the selected team.

   Approved By. Enter the person's name or click **Select** to choose a user from the Users list to search for articles assigned to a specific approver.

Author. Enter the person's name or click **Select** to choose the user from the Users list to search for articles authored by a specific user.

Published. Select from the drop-down list to define the time frame with values like On, Before, After, and so on. Enter the date or click the calendar icon and select it. This searches for articles published on the specified date or time period.

Expires. Select from the drop-down list to define the time frame with values like On, Before, After, and so on. Enter the date or click the calendar icon to select it. This searches for articles that expire on the specified date or time period.

Attachments.Select from this drop-down list to search for articles with or without attachments. You can also search using criteria like Mime Type and Attachment name.

External Article? Select this checkbox to search for external articles.

Save this search as. Enter a name, for example Search1, and click **Save** to save the specified search criteria for future use.

Previous Saved Searches. Select the name of the saved search from this drop-down list and click **Search** to search using a Saved Search criterion.

3. Click **Search** to commence the search for articles that meet the specified criteria.

   The search results display a list of articles that match your criteria.

To browse for an article

1. Click **View Articles** on the **Knowledge Base** tab.

   This displays the **Search** page.
2. Click the Browse tab on the Search page.
3. Click the + sign to view the articles and sub-tags nested within a tag.
4. Select a tag to view its contents.

   This displays all articles within a selected tag in the right panel.
5. To view the contents of an article, place the cursor on the article name.
6. To perform an action such as editing or emailing the article, click the article name.

Documents Module

Use the **Documents** module to create and manage files that you share with users and contacts.

Creating Documents

You can create a library of documents and graphics that you can share with other users and contacts, ranging from marketing collateral to contracts. You can also create templates for frequently used documents.

Documents that link to an external account (for example Google Docs, IBM LotusLive) cannot be used as attachments in emails composed through the Sugar Email Client.

To create a document

1. Select **Create Document** from the **Actions** drop-down list on the **Documents** tab or click the Create icon on any page within the **Documents** module or Go to the Detail View of any module that has the **Documents** subpanel (for example, **Accounts**).
2. Enter information for the following fields on the **Documents** page:

   Source. Select the source of your document, for example Sugar or Google Docs, from this drop-down list. Google Docs needs to be enabled by your system administrator for you to be able to access it in Sugar. If Google Docs is not enabled, contact your system administrator. You may also need to enable Google Docs once the system administrator has allowed you access. For more information, see External Accounts.

   File Name. Name of the file you are using to create the document; click **Browse** to navigate to the location of the document.

   Document Name. Enter a name for the document.

   Document Type. Select a pre-defined document from this drop-down list. If the document does not belong to any of the listed types, select **None**.

   Publish Date. Click the **Calendar** icon and select the date when the document is published for other users to view and download it.

   Expiration Date. Click the **Calendar** icon and select the date when the validity of the document expires. For example, collateral for a sales campaign may not be useful after the campaign ends.

Status. Select the status from this drop-down list, to indicate the current state of the document such as **Draft** or **Under Review**.

Revision. Enter the revision number if you revised this document.

Template. Select this box if you are creating a template.

Category. Select a pre-defined category from this drop-down list. Select **None** If none of the categories apply.

Sub Category. Select the applicable category subset if you selected a category.

When you select a category and sub-category for the document, the document is added to the Document tree using a hierarchical structure. The tree structure displays in the List View to make it easier to find documents under a specific subject. The administrator defines the category and sub-category values.

3. **Teams**. To change the primary team assignment, enter the name of the new primary team. To assign additional teams to the record, click **Select**, and choose the team from the Team List, or click **Add** to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.

   Related Document. Click **Select** to associate a related document.

   Related Document Revision. This is auto-populated by the revision number of the associated document.

   Description. Enter a brief description of the document.

4. Click **Save** to create the document; click **Cancel** to return to the document list without saving the document.

Managing Documents

Managing documents includes tasks such as editing, deleting, and tracking changes.

To manage documents

- To sort a List View, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To edit or delete information related to multiple documents, select multiple records in the Documents List View and click the **Mass Update** link in the **Actions** drop-down list. For more information, see To edit or delete multiple records.
- To view the details of a document, click the document name in the List View.
- To view an attachment, click the **attachment** link; To update an attachment, see To update an attachment.
- To edit a document, click **Edit** on the Detail View page.
- To duplicate an opportunity, click **Duplicate** on the Detail View page. Duplication is a convenient way of creating a similar document. You can change the information in the duplicate record to create a new document.
- To delete a document, click **Delete** on the Detail View page.

- To export documents, select them from the Documents List View, click **Export** in the **Actions** drop-down list and follow the process described in Exporting Data.
- To create or manage related records in a sub-panel, see To manage related information in sub-panels.

To update an attachment

1. Click **Create** in the **Document Revisions** sub-panel of the document's Detail View page.

   This displays the **Document Revisions** >> **Create** page.
2. Enter information for the following fields:

   FileName. Enter the name of the file containing the revised information; to navigate to the file location, click **Browse**.

   Revision. This field is auto-populated with the revision number.

   Change Log. Enter a brief description of the revision.
3. Click **Save** to save your changes; click **Cancel** to go back to the document detail page without saving your changes.

   You cannot change the name of the attached file. The revised file is displayed along with its revision number in the **Documents Revisions** sub-panel. The row listing the older document version now displays the **rem** icon to remove the file.
4. To remove the previous version of the attachment, click the **rem** icon, and click **OK** to confirm the removal.

Identifying MS Word Mail Merge Templates

You can identify Microsoft Word mail merge templates in the **Documents** module. These templates are used when a mail-merge is performed directly from within Sugar and can be created from the Sugar Plug-in for Microsoft Word and uploaded to the Sugar document repository.

- The document type displays as **Mail Merge** on the Detail View page if it is a Mail Merge template.
- A link allows direct access to the Sugar Mail Merge Wizard in the navigation bar.

Products Module

Use the Products module to define, catalog, and manage products for your organization.

You have the option of selecting an item from the product catalog, or creating a new product that is not in the product catalog.

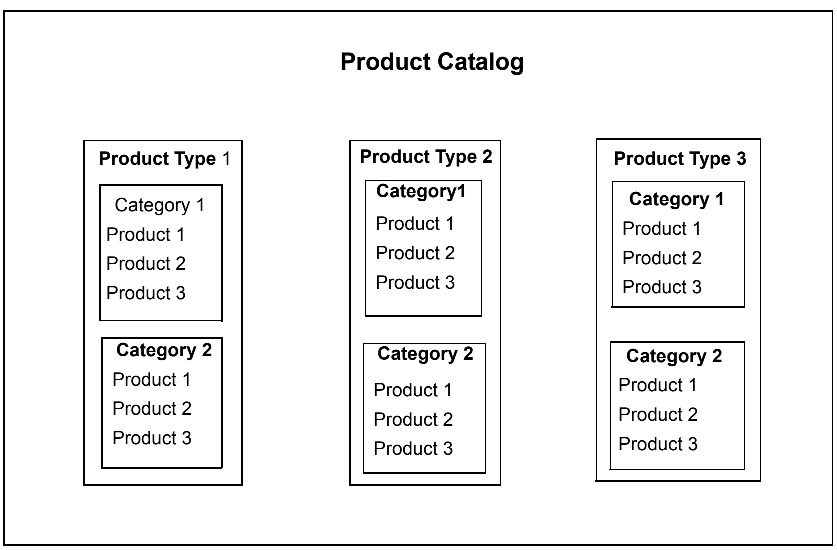
About Products and Product Catalog

The **Products** module lists all products that have already been sold or are in the process of being sold.

The **Product Catalog** displays a list of all the products that your organization sells. By entering products into the product catalog, the sales team will be able to add products to quotes.

The product catalog is a manually maintained list managed by the administrator and groups products into product types. Each product type can consist of several product categories. Each product category can further be grouped into sub-categories. The association between categories and individual records is represented as parent-child relationships in a hierarchical manner. A category is a parent and the individual products are the children. A sub-category is both a parent and a child.

The administrator defines all the product types, categories, and manufacturer information within Sugar. The following illustration depicts the hierarchy in the product catalog.



Sugar enables you to create a free standing item if your organization does not maintain a product catalog or if you need to define a product that is not in the catalog. Products that you define are not added to the product catalog.

Defining Products

When you define a product, you can select a type and a category from the existing list setup by the administrator. This enables you to group and manage them effectively. You can also associate a product with an account. This enables you to view and edit the product from the account's Detail View page.

The **Products** home page lists products that you define but not those from the **Product Catalog**. When you create a quote from the **Product Catalog**, the records in the quote are automatically added to your products list.

After you define a product, you can link it with a related product in the record's Detail View.

To define a product

1. Select **Create Product** from the **Actions** drop-down list on the **Products** tab or click the Create link on any page within the **Products** module or from a line item within a quote, or from the Detail View of **Accounts** and **Contacts**.
2. Enter information for the following fields on the **Products** page:

   Product. Name for the product; or click **Select** to choose from the **Product Catalog**.

   For more information, see To select an item from the Product Catalog.

   Status. Select the current status for the related account, such as **Shipped** or **Quoted**, from this drop-down list.

   Account Name. Input name of the related account or click **Select** and then click the account name to select from the **Accounts** list.

   Quantity. Number that specifies the product quantity for the account.

   Serial Number. Product's serial number.

   Asset Number. Product's internal inventory number.

   Contact Name. Click **Select** to view the **Contacts** list; click the contact name to add it to the product information.

   Purchased. Click the **Calendar** icon and select the purchase date if the product is being purchased.

   Support Starts. Click the **Calendar** icon and select the date when support begins if your organization provides product support.

   Support Expires. Click the **Calendar** icon and select the date when support stops.

   Currency. Select the currency in which the account will pay for the product from this drop-down list.

   Cost. Actual cost of the product.

List Price. List price for the product.

Unit Price. Unit price for the product.

Book Value. Amount of the order that was booked, if the account is purchasing the product.

Book Value Date. Date on which the order was booked.

Discount Rate. Discount offered on the product.

Discount in %. Check this box to indicate that discount rate offered is in % format.

Product URL. Web address location if product is available online.

Manufacturer. Select the product manufacturer from this drop-down list.

Mft Part Number. Manufacturer's part number for the product.

Vendor Part Number. Part number for the product if your organization is the vendor.

Tax Class. Specify if the product is taxable from this drop-down list.

Weight. Product weight.

Category. Select the category to which the product belongs from this drop-down list.

Type. Select the product type from this drop-down list.

Description. Brief product description.

Support Title. Title of the Support personnel providing product support.

Support Desc. Brief support description.

Support Contact. Name of user responsible for providing support to the account.

Support Term. Select the term for which support will be provided from this drop-down list.

3. Click **Save**.

   This displays the product in the Products List View.

To select an item from the Product Catalog

1. Click the **Select** button located next to the **Product** field to select an item.

   This displays the **Product Catalog** page.

   The **Product Catalog** page displays three sub-panels.

   - **Search** sub-panel enables you to search for a product by name, category, type, or manufacturer.
   - **Product Catalog** sub-panel displays product categories in a hierarchical manner.
   - **Product Catalog List** sub-panel displays independent nodes (records) of each product category within the catalog tree. Parent nodes (sub-categories) and their child nodes (records within the sub-categories) are not displayed in the list.

2. To view independent nodes within a product category, click the category name in the **Product Catalog** sub-panel.
3. To view or drill down a parent node within a category, click + located next to the category name in the **Product Catalog** sub-panel.

   Sugar displays the child nodes in the Product Catalog List when you click a parent node.
4. To select an item, click its name in the **Product Catalog** list.

   This enters the item name in the **Product** field of the **Products** page. Other information such as the category, manufacturer, and the manufacturer's part number display in the relevant fields.

Managing Products

Managing products includes tasks such as editing, deleting, importing, and exporting records.

To manage products

- To link a product with related products, click **Select** in the **Related Products** section of the product's Detail View. (**Note**: **Products** sub-panel has to be enabled by your system admininstrator for display of **Related Products**.)
  Search for the related product in the **Product Search** pop-up box, or scroll down to select it from **Product List**.
- To sort a List View, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To edit or delete information related to multiple products, select multiple records in the Products List View and click the **Mass Update** link in the **Actions** drop-down list. For more information, see To edit or delete multiple records.
- To view the details of a product, click the product name in the Products List View.
- To edit the product details, click **Edit** on the Product Detail View page, update the information and click **Save**.
- To duplicate a product, click **Duplicate** on the Product Detail View page. Duplication is a convenient way of creating a similar product. You can change the information in the duplicate record to create a new product.
- To delete a product, click **Delete** on the Product Detail View page.
- To track changes to a product, click the **View Change Log** link on the Product Detail View page.
- To import product information, click **Import Products** from the **Actions** drop-down menu in the **Products** tab. For more information on importing data, see Importing Data.
- To export information on one or more products, select them in the Product List View, click **Export** from the Actions drop-down list, and export them as described in To export data from Sugar.

- To manage records in a sub-panel, see To manage related information in sub-panels.

Forecasts Module

Use the **Forecasts** module to view quotas and committed sales amounts based on sales opportunities for customer accounts. Only users who are assigned opportunities and their managers can view forecast information in Sugar.

Note: By default, this module is hidden. The administrator must display it for your use.

A forecast is an estimate of the revenue you can generate in a quarter and is comprised of the following:

- Time periods
- Forecast schedules
- Forecast worksheet
- Sales quotas

Time Periods

Typically, forecasts are based on month, quarter, or year. Organizations can define any time period depending on how they want to measure sales forecasts; for example, weekly or daily forecasts. Based on this decision, administrators define the sales forecast time periods in Sugar. Administrators can also define the fiscal year for your organization and associate it with the forecast time periods. The **Forecasts** module displays time periods after the administrator has defined them.

Forecast Schedules

Based on the defined forecast periods, the administrator can create different forecast schedules for each team. For example, one team's forecast schedule can be based on monthly time periods and another team's on quarterly time periods.

Forecast Worksheets

A Forecast worksheet reflects what sales people and their managers estimate they can generate in sales. Displayed information in Forecasts Worksheet depend on your role in the Sales organization.

Regardless of what is entered in the worksheet, the performance of sales representatives is, typically, measured against their sales quotas. The worksheet enables Sales Managers to make more accurate sales predications for a specific time period because it displays a tree view of the reporting hierarchy of the sales organization. Managers can drill down to the opportunities they want to view or edit. They can also view the best case, likely case, and worst case sales estimates, view the committed amounts, and change these amounts.

You can add the **My Forecasts** Sugar Dashlet on your home page for easy access to your worksheet. For more information on adding Sugar Dashlets, see Managing Sugar Dashlets.

Teams are based on the reporting hierarchy in the **Forecasts** module. You can be one of the following roles:

- Sales representatives who are only responsible for managing their own opportunities
- Team leads or lower level managers who are responsible for managing their own opportunities as well as their direct reports
- Sales managers who manage their direct reports but are not responsible for managing any opportunities

Sales representatives. When you log into Sugar as a Sales Representative, the Forecast worksheet displays a list of your opportunities along with the estimated sales amount, probability of a sale, and the weighted amount. Closed Opportunities within the specified time period are displayed.

Sugar automatically extracts details from the opportunities to calculate the Amount, Probability, and Weighted Amount. Any change that you make to an opportunity is immediately reflected in the worksheet.

The **amount** displayed in the worksheet is the opportunity's estimated sales amount.

The **probability** percentage displayed in the worksheet is of the opportunity's sales stage.

The **weighted** amount is the amount that may be realized from the sale. Sugar calculates the weighted amount as the Opportunity Amount divided by the Probability Amount. For example, an opportunity worth $10,000 with a 10% probability will have a weighted amount of $1,000.00.

You can commit the totals of the above amounts as the numbers that you will generate in sales. Sugar enables you to use the worksheet to commit different values for your best case, likely case, and worst case forecasts. Your manager can override your input and enter a new committed amount on their worksheet. This will not impact the amounts entered on your worksheet.

You can view your quota for the selected time period at the top of the Forecasts worksheet.

Team Leads. Team leads can view the estimated best case, likely case, and worst case forecasts for each of their direct reports as well as for themselves. As a team lead, you can view the opportunities of your direct reports. You can also override the committed amount that your direct reports enter on the worksheet. Your worksheet has two levels of committed values, one when you make changes for yourself (Direct) and another when you make changes for your team (Rollup). Commit at the Rollup level to notify your manager about your changes and modifications.

Sales Managers. Sales managers can view the quotas, estimated best case, likely case and worst case forecasts for each of the team leads and their direct reports. This enables them to make more accurate forecasts. As a Sales Manager, you can drill down to the opportunities of any sale representative. You can also override the committed amount for any member of your sales team.

Note: Any changes that a Team Lead or a Sales Manager makes to a sales team member's estimate is independent of that member's estimate on their worksheet. The team member's worksheet does not display changes made by the Team Lead or Sales Manager on the same.

The forecast worksheet also displays a **Create Opportunity** quick form to create a new opportunity. Any new opportunity that you create displays in the Forecast Opportunities sub-panel. For more information on the Opportunities module, see Opportunities Module.

Worksheet Charts

The worksheet enables you to monitor sales forecasts closely. The worksheet chart enables you to view the general sales forecasting trend. The chart displays a 3-point comparison between the actual sales amount, the committed amount, and quotas. View your final committed amount as a stacked group-by chart on the **View Chart** tab to gauge your performance during the past few quarters.

To edit the Forecasts Worksheet

Follow the steps listed below to edit the Forecasts Worksheet:

1. Select the time period from the **Time Periods** drop-down list on the (Forecasts) Worksheet page.

   If you log in as a Sales Representative, the worksheet displays your quota at the top of the page. It also lists the amount, probability, and weighted amount for each of your closed opportunities for the time period.

   a. To view or edit the details of an opportunity, point the cursor at the down arrow next to the opportunity name.

      The Additional Details pop-up displays the account name, probability percentage, and type. Click the **Edit** icon in the pop-up box to edit the opportunity.

   b. To enter an estimate for best case, likely case, and worst case forecasts, enter the amounts in the respective fields.

      Sugar updates the **Totals** row with the specified amounts.

   c. To commit the amounts, click **Copy Values** and select **Total Estimated Amounts.**

      The estimated amount is now reflected in the **Enter amounts that you would like commit** fields.

   d. Click **Commit** and then click **OK** when the system displays a message asking you to confirm the action.

Note that any changes to make to the estimated amount for a direct report or a sales representative does not change their committed values that display on your worksheet. Hence, the totals of the estimated amounts that you commit differs from their committed values.

e. To revert to the committed values, click **Copy Values**, and select **Sum of Committed Values**.

If you log in as a Team Lead or a Sales Manager, the worksheet displays the best case, likely case, and worst case forecasts for your direct reports and yourself, if applicable.

a. To view a team member's opportunity, drill down the tree view of the reporting hierarchy that display on the left, and click the person's name.

   The person's opportunities for the time period display on the right.

b. To view or edit the details of an opportunity, point the cursor at the down arrow next to the opportunity name.

   The Additional Details pop-up displays the account name, probability percentage, and type. Click the **Edit** icon in the pop-up box to edit the opportunity.

c. To change the estimated best case, likely case, and worst case forecast for yourself or a direct report, enter the amounts in the respective fields.

   The system updates the **Totals** row accordingly.

d. To commit the amounts, click **Commit.**

e. To enter an amount that is different from the Totals row, enter the numbers in the appropriate fields below the **Last Commit Date** row and click **Commit**.

   To revert to the committed amounts that reflect your direct reports' estimates, click **Copy Values**, and select **Total Estimated Amounts**.

2. To save your changes, click **Save Worksheet**.
3. To restore the previous values, click **Reset Worksheet**.
4. To view a chart of your final committed amounts for the past few quarters, click **View Chart**.

Sales Quotas

After the administrator creates the forecast schedule, managers can set sales quotas for each team member for each time period. This is the sales amount that the individual is expected to meet for the time period. When team members log into Sugar, they can view their quotas in the Forecasts module. If they have enabled email notifications for themselves, Sugar sends them an email when their manager sets their sales quota.

If you have direct reports, Sugar displays a quota worksheet listing the quota amounts, if any, along with the commit status for the specified time period. If you don't have direct reports, Sugar displays your assigned quota amount, if any, for the specified time period, without the worksheet.

To set a quota

1. On the **Forecasts Worksheet** page, click **Quotas**.

2. On the **Quota Home** page, select the time period from the drop-down list.

   Existing quotas for you and any direct reports display on the page along with the Quota form.

3. Enter information for the following fields:

   Name. Select the team member name from the drop-down list.

   Amount. Enter the quota amount.

   Currency. Select a currency from the drop-down list.

   Commit. Select this box to commit the quota.

4. Click **Save**.

   The quota amount displayed in the panel above reflects the change and the status displays as Assigned. If you do not commit the quota, the status displays as Pending.

Viewing Forecast History

The Forecast History page displays a Search sub-panel that allows you to view committed forecasts for a specific period. If you manage a sales team, you can search for the committed amounts for yourself and your team members. If you do not have any direct reports, you can only search for your committed amounts.

To view the forecast history

1. From the **Actions** list on the **Forecasts tab**, select the **Forecast History** option.

   This page displays a summary of committed amounts for all forecast time periods.

2. To search for forecasts for a specific time period, select the time period in the drop-down list above, select either **My Forecasts** or **My Team's Forecasts** and click **Search**.

Contracts Module

Use the Contracts module to create and manage contracts that you enter into with your customers and vendors.

The Contracts module lists all existing contracts and associated information such as the account name, contract status, and the primary team assigned to the contract. When you create a contract, it is automatically listed under the related account. It is also listed under the related opportunity and quote, if you specified one.

Note: By default, this module is hidden. The administrator must display it in order to enable you to use it.

A contract can reference multiple documents such as a Master Service Agreement (MSA) and one or more Statements of Work (SOW). The details of any document that is referenced in a contract displays in the Documents sub-panel. Other information such as notes, contact information for individuals involved in managing the contract, product information, and quotes are also displayed in sub-panels on the contract's detail page.

The document details are as follows:

- **Document Name**. The name of the document that is related to the contract.
- **Template**. Indicates whether the document is a template.
- **Document Type**. The type of document. For example, a License Agreement or a Statement of Work.
- **Selected Revision**. The version number of the document that is related to the contract.
- **Latest Revision**. The most current revision of the document. Your organization may update documents periodically resulting in several versions of the same document. To ensure that the contract is related to the appropriate version, Sugar tracks document revisions. When a new revision is created, the latest icon displays on the line. Click this icon to substitute the older version with the latest revision of the document in the contract. The Selected Revision column reflects the change in the revision number and the latest icon no longer displays on the line.

  Signed (signed): After the customer signs a document, the contract administrator must scan the signed document into the system to create a Sugar document. This allows users to view the signed document in the Documents sub-panel. Therefore, when the signed icon displays on a line, contact the contract administrator to check whether the contact has been signed and scanned. After the document has been scanned, click the signed icon to navigate to the Documents screen. In the Documents screen, specify the location of the scanned document and other information such as the revision number. The signed icon no longer displays on the line, indicating that the signed document has been scanned into the system.

Edit. Click this icon to edit the document.

Rem. Click this icon to disassociate the document from the contract.

The administrator can set up a workflow that automatically triggers alerts and actions based on specified conditions.

Creating Contracts

You can create contracts only in Sugar. You cannot import contract data, but you can export it.

To create a contract

1. From the **Actions** list on the Contracts tab, select **Create Contract**.
2. On the **Contracts** page, enter information for the following fields:

   Contract Name. Enter a name for the contract.

   Reference Code. Enter the internal reference number for the contract.

   Account Name. Click **Select** and choose the account that is related to this contract from the Accounts list.

   Opportunity Name. Enter the opportunity to which the contract is related.
3. **Teams**. Select the team that is assigned to manage the contract. To change the primary team assignment from your private team, enter the name of the new primary team. To assign additional teams to the record, click **Select** to choose new teams from the Teams List, or click **Add** to add additional team fields and enter the team names. For more information on assigning teams, see Assigning Records to Users and Teams.

   Assigned to. Enter the name of the individual you want to assign to the record or click **Select** to choose from the User List. By default, this record is assigned to you.

   Expiration Notice. Click the Calendar icon and select a date and time to send a reminder to the assigned user that the contract will expire shortly.

   Status. The contract status indicating whether the contract has been signed or not.

   Start Date. The date on which the contract takes effect.

   End Date. The date on which the contract ends.

   Currency. Select the currency from the drop-down list.

   Contract Value. The amount specified in the contract.

   Customer Signed Date. The date on which the customer signed the contract.

   Company Signed Date. The date on which your organization signed the contract.

   Description. A brief description of the contract.

4. Click **Save** to create the new contract; click **Delete** to exit the page without creating the contract.

Managing Contracts

Managing contracts includes tasks such as editing, deleting, and tracking changes made to records.

To manage contracts

- To sort a list view, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To edit or delete all or some of the contracts, use the Mass Update panel as described in To edit or delete multiple records.
- To display the details of a contract, click the contract name in the list.
- To edit the details, on the detail page, click **Edit**.
- To duplicate the contract, on the detail page, click **Duplicate**. Duplication is a convenient way of creating a similar contract. You can change the information in the duplicate record to create a new contract.
- To delete the contract, on the detail page, click **Delete**.
- To track changes to account information, on the account detail page, click **View Change Log** below **Edit**.
- To create or manage related record in sub-panels, see To manage related information in sub-panels.

Projects Module

Use the Projects Module to create and manage projects for your organization.

Every project is assigned to a user and a team. The assigned user is the project manager. By default, this is the user who created the project.The project is assigned to a private team by default, which is typically the user who created the project. The assigned user can assign the project to another user and to multiple teams. For more information on teams, see Assigning Records to Users and Teams.

Only members of the assigned team can access and manage the project and associated project tasks. Therefore, the assigned user must be a member of the assigned team in order to access and manage the project.

Note: By default, this module is hidden. The administrator must display it in order to enable you to use it.

Creating Projects

In the Projects module, you can create, manage, and duplicate projects and project tasks.

You can define multiple project tasks for each project. When you create a project task, you must associate it with a project. You can associate a project with multiple activities, accounts, opportunities, and cases. You can also create projects and project tasks from an email's detail page.

The Projects module enables you to view project tasks in Grid view and Gantt view, export projects to MS Project, and create project templates.

From a project's Gantt view, you can create project tasks and assign team members (resources). Resources can be users or contacts. Users are members of your organization who are responsible for project execution. Contacts are external individuals associated with the project such as customers and vendors. For more information, see To assign project resources.

If your projects often have similar tasks, you can create a project template as a boilerplate for new projects. For more information, see Creating Project Templates.

You can export the project information from Sugar to Microsoft Project. For more information, see Exporting a Project.

You can print project tasks and export them in PDF format to your local machine.

The Projects module also provides the ability to factor in holidays and vacations while planning a project. For more information, see Creating Project Holidays.

The **My Projects Dashboard** enables you to view a summary of overdue tasks, upcoming tasks, and related cases for yourself and your direct reports. For more information, see Viewing the Projects Dashboard.

To create a project

1. From the **Actions** list on the Projects tab, select **Create Project**.

   The Projects page displays on the screen.

2. On the **Projects** page, enter information for the following fields:

   Name. Enter a name for the project.

   Status. From the drop-down list, select the project status such as Draft, In Review, or Published.

   Start Date. Click the **Calendar** icon and select the project start date.

   End Date. Click the **Calendar** icon and select the project end date.

   Assigned to. Enter the name of the user who has ownership of the project. By default it is assigned to you.

   Team. To change the primary team assignment, enter the name of the new primary team.

   To assign additional teams to the record, click **Select**, and choose the team from the Team List, or click **Add** to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.

   Priority. From the drop-down list, select the importance of the project such as Low, Medium, or High.

   Description. Enter a brief description of the project.

3. Click **Save** to create the project; click **Cancel** to exit the page without creating the project.

   The system saves the project and displays its detail page on the screen. From this page, you can create project tasks, assign users and contacts, project templates, and related records. You can also export the project to MS Project.

To manage projects

- To create project tasks, click **View Gantt**. Alternatively, click **View Gantt** in the **Project Tasks** sub-panel. For more information, see Creating Project Tasks.
- To save the project as a template, click **Save as Template**.
- The system saves the project as a template and adds it to the Project Templates list. For more information, see Creating Project Templates.
- To export projects, select them from the list, click the **Export** link and follow the process described in Exporting Data.
- To print the project, click **Print** at the top right-hand corner of the page.
- To delete the project, click **Delete**.

- To add resources, see To assign project resources below.
- To create project holiday, see To create a project holiday.
- To create or manage other records such as activities, see To manage related information in sub-panels

To assign project resources

1. Click the project on the Projects Home page to view its details.

   The project's detail page displays the **Resources** sub-panel.

2. To assign one or more users, click **Select User** and select from the Users list.

   The assigned users are now listed in the **Resources** sub-panel.

3. To assign one or more contacts, click **Select Contact** and select from the Contacts list.

   The assigned contacts are now listed in the **Resources** sub-panel.

   You can remove a resource by clicking the **rem** icon corresponding to the resource name.

Note: You can manage resources only for projects that are assigned to you.

Creating Project Tasks

Typically, a project consists of multiple tasks that must be completed satisfactorily to ensure success. After you create a project, you can create tasks associated with it. When you create a project, the system assigns it to you. Therefore, only you can create and edit all the project tasks. If you assign a task to another user, then that individual can edit the task.

When you create project tasks, you can specify the dependencies between them. For example, if task 1 needs to be completed before task 2 can begin, you can specify task 1 as the "predecessor" of task 2.

You can view a project in grid view or in Gantt view. You can create project tasks only in Gantt view.

You can edit a task in Edit View and in Grid View. Some of the fields that you can update in Edit View are different from those in Grid View. For example, you can edit custom fields in Edit View but not in Grid View. You can edit task duration and assigned resources in Grid View but not in Edit View. It is recommended that you create and manage project tasks in Grid View. You can use Edit View to add and manage additional information that is not accessible through the Grid View.

Project Grid View

The grid view displays details such as the task name, completed percentage, duration, project start and end dates, dependencies, and assigned resources. You can view specific information such as only completed tasks or milestones. Project Managers can edit any task and add additional tasks as needed. Users can specify the completed percentage and actual duration for their assigned tasks.

You can right-click anywhere in the grid view to access the same control options.

The system calculates the duration of a task depending the duration of its sub-tasks. You can specify the duration in days or hours. If you specify the duration of a parent task in days and the duration of one or more sub-tasks in hours, the system rounds off the total amount of time taken and displays the duration of the parent task in days. It also automatically updates the Start and Finish dates based on the duration of the parent task.

You can specify task dependencies for main tasks and sub-tasks. For example, if task 1 must be completed before you can begin task 2, you enter the ID of task 1 in the Predecessors column for task 2. This implies the dependency of task 2 on the completion of task 1.

In grid view, you can export the project tasks as a PDF file to your local machine.

Project Gantt View

The Gantt view displays the total time needed for each task from start to finish.

You use the Gantt chart to create project tasks and view completed tasks and milestones by week or by month.

Note: You cannot print or export the project in Gantt view.

To create a project task

1. On the Projects Home page, click the project in the Project List.
2. In the Project Tasks sub-panel of the project's detail page, click **View Gantt**.

   Sugar displays the Gantt view with two blanks rows on the screen. Each row represents an individual task. To add a new task, click the **Insert Row** icon to add a new row and then enter the task details. To add a new row above an existing row, click the task ID to select the row and then click the **Insert Row** icon.
3. To create a task, enter the following information:

   % Complete. Enter a numerical value to indicate what percentage of the task has been completed.

   Task Name. Enter a name for the task.

   Duration. Enter a numerical value to indicate how long it would take to complete the task. You can specify the duration in days or in hours.

   Start. By default, the system enters the current date as the task's Start date. To change the date, click it and select a different date from the calendar.

   Finish. By default, the system enters the current date as the task's Start date. To change the date, click it and select a different date from the calendar.

   Predecessors. If the completion of this task depends on the completion of other tasks, enter the task name in this column.

   Resource. From the drop-down list, select the individual who is assigned to the task.

Actual Duration. After the task is completed, enter a numerical value for the actual duration of the task.

4. To create a sub-task, select the task ID to select the row and then click the **Indent** icon.

   The selected task becomes a sub-task of the task above. A plus sign (+) displays next to the parent task. To select sequential rows, hold down the **Shift** key while selecting the rows. To select non-sequential rows, hold down the **Control** key while selecting the rows.
5. To change a sub-task to a main task, select the task and click the **Outdent** icon.
6. To copy and paste a task, select the task and click the **Copy** icon. Then, click the **Paste** icon to paste the row.
7. To delete a task, select the task and then click the **Delete** icon.
8. To expand a parent task to view the sub-tasks, select the task and then click the **Expand All** icon.
9. To collapse a parent task, select the task and then click the **Collapse All** icon.
10. If you want a specific view such as overdue tasks or milestones, select the desired view from the **View** drop-down list.
11. Click the **Save** icon to create the task.

    The task is now listed in the Project Tasks sub-panel on the project's detail page. You can click the task name to view its detail page. The task is also represented in the Gantt view.
12. To export as a PDF file to your local machine, in the grid view click **Export to PDF**.

You can edit some details, archive emails, view related activities in the **Activities** sub-panel, and track any task modifications in the **History** sub-panel from a task's Detail View page.

Note: The project task's Detail View and Edit View display a Task Number field and an Order field. These two fields, which were used in the application prior to 5.0, have been replaced by the Task ID field. If you are not using a task number or order number, you can safely remove these two fields from the Project Task layouts in Studio.

To edit a project task

1. On the **Project Tasks** sub-panel, click the task that you want to edit.

   The task's detail page displays on the screen.
2. Click **Edit** for the task's Edit View; click **Edit Task in Grid** for the Grid View. The differences between the two views are described at the beginning of this section.
3. Click **Save** to update the task information; click **Save and Continue** to save the changes and edit the next task in the list.
4. To view the modification made to the task, click **Change Log**.

Creating Project Templates

You can create a project template for projects with similar tasks. When you create a project template, you can define the project tasks. You can then save a copy of the template as a separate project and edit project tasks for each project as needed. Alternatively, you can save an existing project as a template. A template created from an existing project inherits the project tasks. You can edit these tasks if necessary. You can also assign resources based on project requirements.

To create a project template

1. From the **Actions** list on the Projects tab, select the **Create Project Template** option.

   The Project Template page displays on the screen.

2. Enter information for the following fields:

   Name. Enter a name for the template.

   Status. From the drop-down list, specify the template's status by selecting **Draft**, **In Review**, or **Published**.

   Start Date. Enter a start date for the project; to select from the calendar click the **Calendar** icon.

   End Date. Enter an end date for the project; to select from the calendar click the **Calendar** icon.

   Assigned To. Enter the name of the individual you want to assign to the record or click **Select** to choose from the User List. By default, this record is assigned to you.

   Team. To change the primary team assignment, enter the name of the new primary team.

   To assign additional teams to the record, click **Select**, and choose the team from the Team List, or click **Add** to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.

   Priority. From the drop-down list, specify the project's priority such as **High**, **Medium**, or **Low**.

3. Click **Save** to save the template; click **Cancel** to exit the page without saving the template.

   After you save the template, it is added to the **Project Template** list. You can now save it as one or more projects.

4. To view the template, select **View Project Templates** on the Projects tab.

To manage project templates

- To sort the list view on the Project Templates Home page, click the icon in the **Name** column; to reverse the sort order, click the icon again.
- To view the details of a template, click its name in the list view.
- To edit the template, click **Edit** on the template's detail page, make the changes, and click **Save**.

- To duplicate the template, click **Duplicate** on the template's detail page.
- To save the template as a project, click **Save as Project**.
- To delete a template, click **Delete** in the template's detail page.

Viewing the Projects Dashboard

The **My Projects Dashboard** displays the current status of assigned projects.

The information that you can view depends on your role in the project. As a Project Manager, you can view overdue tasks, upcoming tasks, and related cases for all projects that you manage. Your assigned projects along with the overdue tasks, upcoming tasks, and related cases for each project are listed in the top panel of the dashboard. The tasks listed under My Project that those that are assigned to other team members. Tasks that are assigned to you are listed in the My Project Tasks panel below.

Team members who do not have direct reports can only see the status of tasks assigned to them.

To view the detail page of a project, click the project name. Similarly, to view a task or case, click its name in the list.

Creating Project Holidays

When you create a project, you may need to take holidays into consideration. A holiday can be one of the following two types:

- A project team member may take time off from the project but may still be working on other projects. If so, the Project Manager can create a project holiday to account for the member's absence.
- If a project team member is going on vacation, the individual can report it on the User Settings page.

To create a project holiday

1. On the **Projects Home** page, select the project to view its details.
2. In the **Project Holidays** sub-panel on project's detail page, click **Create**.

   The Holiday form displays on the page.
3. Enter information for the following fields:

   Holiday Date. Enter the holiday or vacation date; to select a date from the calendar, click the **Calendar** icon.

   Description. Enter a brief description or reason for the holiday.

   Resource Name. From the drop-down list, select the user or contact who is taking the holiday.
4. Click **Save** to save the holiday; click **Cancel** to exit the form without saving the holiday.

The saved holiday is listed in the Project Holiday's sub-panel on the project detail page.

Creating Project Resource Reports

From the grid view and the Gantt view, you can create a report that displays a user's assigned tasks across projects. The report displays all the project tasks along with details such as the project name, the workload percentage per project, duration of each project, and any scheduled holidays. The Resource report not only breaks down a user's workload across projects but also lists the percentage of busy time for each day. This enables managers to better evaluate the status of ongoing projects.

To create a project resource report

1. In the project's Detail View, click **View Gantt**.

   The Gantt view displays on the page.
2. Click **Resource Report**.

   The **Resource Report** form displays on the page.
3. Select the user from the **Resource** drop-down list.
4. Click in the **Tasks that Start or Finish After** field and select the date on which a task begins or ends.
5. Click in the **And Before** field and select the date before which the task would end.
6. Click **Report** to run the report.

   The report displays the daily status, the assigned project tasks, and any scheduled holidays.

Exporting a Project

You can save a Sugar project in MS Project format. You can open the .MPX file in MS Project or save it to your local machine.

To export a project

1. In the project's Detail View, click **Export to MS Project**.

   The system displays a message asking if you want to open the .MPX file or save it.
2. To open the file in MS Project, select **Open with MS Project** and click **OK**. To save it to your local machine, select **Save to Disk,** and navigate to the location where you want to save it.

Employees Module

Use the Employees module to view information such as name, title, and email address for employees in your organization.

All Sugar users are employees, not all employees are Sugar users. An employee needs a username and password to log into Sugar to be a user.

Creating Employees

Administrators can create and manage employee records. Users can only view an employee's record.

To create and manage an employee record

1. Select **Create Employee** from the **Actions** drop-down list of the **Employees** tab.

   The **Employees** page displays on the screen.
2. Enter the employee's information such as name and phone numbers.

   To add the employee's photo, click the **Browse** button located next to the **Picture** field, navigate to the location of image file and upload it into the record. You can upload the image file in JPG or PNG format.
3. Click **Save** to create the record; click **Cancel** to exit the page without creating the record.

   Sugar displays the record in the List View of the Employees Home page.
4. To update information on the supervisor or status of multiple employees, use the Mass Update panel as described in Editing and Deleting Multiple Records.
5. To delete an employee, click the Delete button in the record's Detail View.

To view or contact an employee

- To search for an employee, use the **Search** sub-panel located above the Employees list.
- To view an employee's details such as the title and contact information, click the employee name in the list.
- To email an employee, click the user's email address to open Microsoft Outlook and create the email.

Using Sugar Mobile

Sugar Mobile enables you to access the mobile view of Sugar from a wireless device, such as a Smart phone, to perform activities and manage your assigned records. You can view all records that are assigned to you, your teams, and your direct reports.

You can perform a basic search from your wireless device in the same manner as you do on your local machine. You can search for only your assigned records or for all records assigned to your teams and your direct reports.

If you have saved searches in the Sugar application, you can view them from a wireless device as described in **To use saved searches**. For more information on creating Saved Searches, see **Saving Search Criteria and Layout**.

Viewing and Creating Records from Sugar Mobile

Depending on the module that you access, you can also create records from a wireless device. However, you cannot delete records from Sugar Mobile.

The table below lists the types of records that you can view and create from a mobile device.

Modules	View Records	Create Records
Accounts	X	X
Contacts	X	X
Leads	X	X
Calls	X	X
Meetings	X	X
Tasks	X	X
Opportunities	X	
Cases	X	
Employees	X	

To view Sugar records from a mobile device

1. Enter the URL of your Sugar application in the browser on your mobile device.

Note: If you are unable to access the mobile view from your mobile device using your regular Sugar instance URL, append “&mobile=1” to the end of the URL, after the entire URL loads.

2. Log into the Sugar application with your Sugar username and password.

   Note: Ensure that css and Javascript are enabled for the browser on your wireless device to successfully log into Sugar.

   The Welcome page displays activities for the day as well as a list of records that you last viewed. You can select the module you want to access on this page.
3. To access a module, select it from the drop-down list and click **Go**.
   This displays a Search form. By default, the **Only my items** option is selected to filter for records that are assigned to you.
4. To search for all your assigned records, leave the search field blank and select the **Only My Items** box; click **Search**.
5. To search for a specific record within the module, enter the record name in the search field and click **Search**. If the record is not assigned to you, deselect **Only my items** before you begin the search.

Note: You cannot use related records as a search filter in mobile view.

   Sugar displays the search results on the screen.

   The list of records is paginated. The administrator sets the number of records that display per page.
6. To view a record, select it from the list.

   The record’s Detail View displays on the screen. You can edit records that are assigned to you on this page. You cannot edit records that are not assigned to you.
7. To edit a record, scroll down and click **Edit**.

   This displays Edit View of the record.
8. Make the necessary changes and click **Save**.
9. To view a list of related records, scroll down to the Related Information sub-panel in the Detail View of the record.

   The list of related records is paginated. The administrator sets the number of related records that display per page.
10. To view the details of a related record, select it from the Related Records list.
    This displays the Detail View of the related record.
11. To edit the related record, click **Edit** in the Detail View page of the related record.
12. Make the necessary changes and click **Save**.

To create Sugar records from a wireless device

1. Select a module from the drop-down list, and click **Create**.

   This displays the new record’s fields.

2. Enter the necessary information such as the record name and the user assigned to it.
3. Click **Save**.

   This displays the record's Detail View.
4. To add a related record such as an activity, scroll down to the **Add Related Information** field and select a module from the drop-down list.
5. Click **Add**.
6. Enter the necessary information and click **Save** to create the related record.

   You can view the record in the **Related Information** sub-panel of the primary record. You can add multiple related records.
7. To edit the primary record, click **Edit**, make the necessary changes and click **Save**.

To use saved searches

1. Select the saved search you want to use from the **Saved Searches** drop-down list.
2. Click **Search**.

   This displays the saved search results.
3. To view a record, select it from the saved search results.

Importing Data

You can import new data into Sugar as well as update existing data. This chapter focuses on importing data through CSV (Comma Separated Value) files, you can also use files in TSV (Tab Separated Value) or custom delimited formats.

You can import data for the following Sugar modules.

- **Accounts**: Accounts are "Company" records. You can import this data as a comma-delimited, tab-delimited, or custom delimited file, and from Salesforce.com and ACT!
- **Contacts**: A contact is a person who belongs to an account. You can import this data as a comma-delimited, tab-delimited, or custom delimited file, and from Microsoft Outlook, Salesforce.com, and ACT!
- **Leads, Opportunities**, and **Cases**: Prospects are considered Leads in Sugar. Opportunities are your sales opportunities, and Cases are the customer-reported issues regarding your product. You can import this data as a comma-delimited, tab-delimited, or custom delimited file, and from Salesforce.com.
- **Targets**: Targets are the people who receive your campaign emails. You can import this data as a comma-delimited, tab-delimited, or custom delimited file.
- **Activities (Calls, meetings, tasks, and notes)**: You can import this data as a comma-delimited, tab-delimited, or custom delimited file, and from Salesforce.com.

Note: You cannot import data for custom Flex Relate fields.

Administrators can also import the following data.

- **Users**. These are employees within your organization who are Sugar users. You can import this data as a comma-delimited, or tab-delimited file, custom delimited files, and Salesforce.com.
- **Product, Product Types, Product Categories,** and **Tax Rates.** You can import this data as a comma-delimited, tab-delimited, or custom delimited file, and from Salesforce.com.

During import, the system populates fields in newly created related Sugar records based on fields in the imported data. For example, when you import a contact with a listed account name, Sugar auto-populates the phone number, email address, and mail address fields.

Overview of the Import Process

The process of importing data into Sugar, and best-practice recommendations are listed below.

Step 1. Extract data. To import data into Sugar, you must first obtain the data from the existing system.Tools such as ACT! have their own export capabilities. If you are moving to Sugar from a CRM system, you will need to contact them to obtain your data. If the data, for example, is in an Excel spreadsheet, you can save it as a CSV file on your machine, and import it into Sugar. You will need a single CSV file for each Sugar module. Ensure that the import file has a header row containing the names of the associated fields to ease the mapping process.

Step 2. Cleanse the data:

- Check for spelling errors, incorrect formatting, and missing information.
- Delete duplicate records, if any.
- Remove any identifiers in your existing data because Sugar creates its own unique identifiers during the import process. Sugar uses "ID" fields for identifiers, therefore, if you want to retain the field values of your identifiers, ensure they are not named "ID".
- Sugar treats columns named "date_entered" and "date_modified" specially. If your data contains column names titled "date_entered" and "date_modified" and you want to retain the original date values, create custom fields to store these values. For information on creating custom fields, see Studio.

Step 3. Prepare mappings. If you see fields in the CSV file that do not map directly to Sugar fields, create custom fields in Studio and add them to the Edit View and Detail View layouts to store that data. See Mapping Datafor more information.

Step 4. Perform an import test. Save a small subset of your data as a CSV file and use it to map data in a trial run of the import. You can save this mapping to use later. Always import the Account data first and then import contacts, leads, and other data. This enables Sugar to create a relationship automatically between an account and associated contacts, as well as other records containing the same account name.

Step 5. Import the data. Use the custom mappings that you built in the previous step. If you have a large amount of data running into thousands of records, it is recommended that you import them in smaller batches to ensure that the process is successful.

To import data

1. Select **Import** from the **Actions** drop-down list on the module's tab.

   The first step in the import process displays on the screen.

2. Select one of the following as the data source:

   Comma Delimited File. Select this option if the fields in the import file are separated by a comma or if the file is in .csv format.

Fields Qualified By: Identify the qualifier, if any, enclosing each field including delimiters in the import file. When you export Sugar records, the system uses double quotes as the qualifier.

From the drop-down list, select one of the following:

None. The import file does not contain any qualifiers.

Double Quotes. The import file contains double quotes as qualifiers. For example: “abc”,“xyz”,“efg”.

Note: When you export records containing multi-select field items, the items are typically separated by carats or commas in the export csv file. Hence, you must use double quotes to successfully this data.

Single Quotes. The import file contains single quotes as qualifiers. For example: ‘abc’,‘xyz’,‘efg’.

Other. The import file contains a qualifier other than single quotes or double quotes.

Tab Delimited File. Select this option if the fields in the import file are separated by a tab and the file extension is .txt.

Custom Delimited File. Select this option if the import file uses a delimiter other than a comma or a tab. Enter the delimiter in the **Fields Delimited By** field and enter the delimiter in the adjacent field.

Salesforce.com. Select this option if the import file is located in the Salesforce.com database. Instructions to import from Salesforce display on the screen.

Note: Salesforce record IDs are case-sensitive. Therefore, records that have the same ID but with variation in case are treated as separate records. However, MySQL and MS SQL databases do not recognize the case-sensitivity and treat such IDs as one ID. As a result, some records may not be successfully imported, and parent-child relationships may be lost during import.

Act!2005. This option is available only for Sugar modules that are mapped to a corresponding module in ACT and the import data is located in the Act! 2005 database.

Microsoft Outlook. This option is available only to import contacts into Sugar.

3. Under **Import Action**, select one of the following:

   Create Records: Select this option to create new records.

   If the import file contains record IDs that already exist in Sugar, and you do not map the IDs to the ID fields in the module, then new records will be created. If you map those IDs to the ID fields in the module, then import will not occur. The error log displays “ID already exists in this table” for each row containing an existing ID.

   Create and Update Records: Select this option to create new records and update existing records with new values. To update records, the import file must contain the record IDs. This will avoid record duplication.

4. Click **Next** to proceed to the next step in the import process.

Upload the file containing the import data from your local file system. Depending on the specified data source, the information you see on this page will vary.

5. In the **Select file** field, enter the path to the file location; or click **Browse** to navigate to the file location on your machine.
6. If the file has a header row, check the **Has Header** box.

   Typically, a header row contains column titles such as Name and Address.
7. Click **Next** to proceed to the next step in the import process.

   The page displays, for the first record in your import file, a preview of the mapping between the fields in the Sugar database and the headers in the import file. You can change the mapping if needed. The **Database Field** column displays a drop-down list of all fields that exist in the Sugar database for the module. The system automatically finds possible matches for the field names in the Header row and selects them in the **Database Field** column. For unmapped fields, the **Do not map this field** option displays in the **Database Field** column. You can change the mapping if needed. If you do not want leave the **Do not map this field** unchanged.

   The **Header Row** column displays field titles in the header row for the first record in the import file.

   The **Default Value** column provides the option to enter a value if the import file does not contain a value for the field. For example, when you import Leads, you can select the default value for the Lead Source, such as Direct Mail, Trade Show, and so on from the drop-down list in the **Default Value** column.

   Row 1 displays data from the first non-header field in the first record of the import file.
8. To add additional data to a record for which the import file does not have a corresponding field, scroll down to the bottom of the page and click **Add Field**. Select an existing field in the Sugar database from the drop-down list and enter its value in the corresponding **Default Value** field.

   The field with the new value is added to the list of database fields; to remove it, click the corresponding **Remove Field** button.
9. To save the mapping as a custom mapping that you can use repeatedly, scroll down to the bottom of the page and enter a name in the **Save Mapping as** field.

   Saved mappings are listed on the first page of the import process.
10. To modify the datetime format or other settings to match those in the import file, scroll down to the bottom of the page and click **Show Advanced Options**.

    Advanced Options displays the default settings, including the datetime format, from your User Preferences page. You can change the default settings if necessary.
11. To check for duplicate entries, click **Show Advanced Options** and view the **Verify duplicate entries against selected indexes** column. To check for duplicates using fields such as **Team ID** and **Assigned users**, move the desired indexes from the **Index(es) Not Used** column to the **Index(es) Used** column using the left arrow button. The indexes in the **Indexes Used** column are the additional indexes that are checked during import. If the values in the import file match the

values for these fields in an existing record, that record will be treated as a duplicate and will not be imported.

To remove a field that you do not want to use to check for duplicates, use the right arrow to move it back to the **Index(es) Not Used** column. Use the up and down arrows to sort the order in which the indexes are checked for duplicates.

12. Click **Import Now** to import the data.

    The **Import Results** page lists the imported data and lists how many fields were successfully imported and how many were skipped.

    If the import is unsuccessful or partially successful, Sugar displays a link o view the rows that were not imported and the error messages. You will be prompted to download the .csv file containing the information. You can download the file, correct the errors, and then import those records into Sugar.

13. If you do not want to save the imported data because of incorrect mapping, click **Undo Last Import**; You can click **Try Again** to restart the import process.

    The system will not duplicate the record when you restart the import process.

14. To import additional data, click **Import More**.
15. To return to the module's home page, click the **Return to** button.

Importing Account Data

If you are importing account data from another CRM system, typically, that system understands the distinction between a contact and an account – that one account can have multiple contacts, and has separate data for each contact. However, you can import just contact data from simpler Contact Manager applications– such as Microsoft Outlook.

You can relate records to accounts during import in the Accounts, Contacts, and Opportunities modules. Create an account spreadsheet and import account records into the Accounts module first. This will ensure that when you import other related records such as contacts, cases, and opportunities later, those relationships are preserved.

Note: If you are importing data into a custom module that allows you to relate records to accounts, import the account records first if they are not already in Sugar to ensure the new account record fields are populated.

To import account data

If you are importing account data from a CRM system, proceed to step 4. If you exported contact data, and want to import it as account data into Sugar, do the following:

1. Copy your exported *contacts.csv* file and save it as *Accounts.csv*.
2. Edit the *Accounts.csv* file using Excel. First, sort the file on the column which contains the company name.

   As you scroll through your data, sorted by company name, you may see successive records that have the same company name if there is more than one contact from that account (in Sugar's terminology). To avoid creating multiple copies of the same account in Sugar, you need to delete the duplicate contacts. And to make sure that the most complete information is attached to the account record, retain only the contact whose address and telephone information best represents the account as a whole.

Also look out for company names that are similar but not identical because to inconsistencies in the way the company name was entered – you should delete all duplicate records except the one with the company name spelled exactly how you want to see it in Sugar.

3. Save the Excel file as a .csv file type.
4. Click **Import** on the **Accounts** tab **Actions** and follow the process described in To import data.

After the account data has been imported, you can export contacts from your current Contact Manager application and then import them into Sugar.

Importing Contact Data

If you import a contact record that refers to an unknown account, then a new contact record is automatically created for an account of that name. Note that when account records are created automatically in this fashion, they are empty. That is, they have associated contacts but no address or telephone information. Therefore, you will need to add those details manually later. To avoid this task, it is recommended that you import the account data first to create complete records with address and telephone information (and other information depending on your previous CRM system) and then import contact data.

To export contacts from your current contact manager application

The process below describes exporting contact information through Outlook 2003. Other systems work in a similar manner.

1. Under the File menu, select **Import and Export**.

   The Import and Export Wizard dialog box displays on the page.
2. Select **Export to a file** and click **Next**.
3. Select the option to create a file of the type **Comma Separated Values (Windows)**, and click **Next**.
4. Select an Outlook folder from which to export – typically your contacts folder - and click **Next**.
5. Enter the filename and directory location for the exported file to be created, and click **Next**.
6. To confirm your intention to export this file, click **Finish**.

   Outlook 2003 creates a .csv file. To ensure that the data has been exported successfully, you can view the file using Microsoft Excel or a text editor.

Now you can import the contact data as described earlier in To import data.

During import, ensure that you correctly map the names of the incoming fields with the names of the corresponding Sugar fields. If you are importing from Outlook, a particularly important field mapping is the incoming **Company** field to the **Account Name** field within Sugar. This is required to ensure that contacts are associated with the correct accounts.

Importing Drop-down List Values

To successfully import drop-down list options, ensure that the import file contains database values (that is, item names) and not the display labels. This is because Sugar requires the ID associated with each option that is stored in the database.

To do this, confirm that the drop-down value you are importing is listed in your spreadsheet as it appears in the database. You can contact your system administrator to retrieve the database value for you, or you can also view it yourself by reviewing the HTML source code for a record's Edit View.

To copy drop-down list values

1. From the List View, select the desired record to view its details.
2. In the Detail view, click **Edit**.
3. In the Edit View, highlight the appropriate drop-down field, drop-down selection box, and the next available database field. You must highlight the next available database field to capture the drop-down selection box values.
4. Right-click the highlighted fields and select **View Selection Source**.

   The **Source of Selection** window displays the source code, including the drop-down list values.
5. Enter the appropriate database values without the quotation marks into the corresponding column of the import spreadsheet.

Mapping Data

When you import data, you will need to map it to fields that exist in the Sugar database. For example, to map the first and last names of contacts that you import into Sugar, these fields must exist in the Sugar database. If not, you will need to create these fields in Sugar before you import the data.

The last stage of the import process provides an Advanced Options section to view your import file settings. Advanced Options lists the default settings in your User Preferences page. Ensure that the File Encoding format, Date format, and Time format match those in the import file. If not, change the settings under Advanced Options before you import the data. For example, if the import file is using EUC-JP and your default setting is UTF-8, you will need to change the default setting to EUC-JP.

You can save mappings for future use. You can also publish saved mappings to enable other users to use them. In the process of mapping data, you can assign a record to a user or a team.

File Encoding allows you to use an import file that is in another language. That is, a file with a different character encoding than in the Sugar instance. During the import, if the user selects the appropriate file encoding, then the data will be imported with the encoding specified for the Sugar instance.

To manage saved mappings

- To use a saved mapping, on the Import page, select the mapping before proceeding to Step 2 of the import process.
- To publish a mapping that you saved, on the Import page, select the mapping and click **Publish**.

  The mapping is now listed on the Import page of your team members. They have the option of deleting it, if needed.
- To un-publish a mapping that you published, click **Un-publish** on the Image page.

  The mapping is now no longer available to other members of your team.

Exporting Data

You can export Sugar records in .csv format to your local machine. Use Microsoft Excel, Notepad, or other text editors to open .csv files.

The .csv file displays column titles, including the Record ID (a long string of letters and numbers used as a unique reference to each account record) and all the other fields in the module.

Note: When exporting values for drop-down list options, Sugar exports the ID associated with each option (that is, item name) and not the display labels.

If you are exporting records that are assigned to multiple teams, the Team_Name column displays all the assigned teams for each record.

To export data from Sugar

1. Select the records from the List View on the module's home page.
2. Select **Export** from the **Actions** drop-down menu in the List View.

   To export all records listed on the page, click **Select** located above the item list and select one of the following options:

   This Page. To export all the records listed on the page, select this option.

   All Records. To export all records on the list (if it is more than a page long), select this option.

   This displays an **Opening.csv** dialog box.
3. Select **Open** to open the export file in .csv format or select **Save to Disk** to save the .csv file to your local machine.
4. Click **OK** to execute the operation. If you chose to open the file, the csv file opens in Microsoft Excel.

   The file contains all the fields in the module from which you are exporting the data.

Administering Sugar

This section describes options that enable Sugar administrators to configure the application to meet their organization's requirements.

Topics include:

- **Configuring Settings in Sugar**
- **Users**
- **Sugar Connect**
- **System**
- **Email**
- **Developer Tools**
- **Products and Quotes**
- **Bug Tracker**
- **Forecasts**
- **Contract Types**
- **Employee Records**
- **Knowledge Base Administration**
- **Advanced Configuration Options**
- **Sharing Calendar Information in Microsoft Outlook**

A Sugar user can be a System Administrator, or a user with or without module-specific administration or developer privileges.

A System Administrator is a user who has access to all Sugar records and full control over administering and developing the application.

Module administration privileges allow users to have administrator access to records or to have control over the customization and administration of the modules. The System Administrator can grant this type of access to a user to allow the individual to manage a specific module. For more information, see Role Management.

When you log into Sugar as an administrator, the **Admin** link displays on the top right corner of your page. Click this link to view the Administration page. The Administration page displays sections that group tasks according to the area of administration.

Configuring Settings in Sugar

The **Admin Wizard** displays when you log into Sugar for the first time after installation. This wizard guides you through the process of branding, localizing, and configuring email settings in Sugar that will be applicable to all users in your organization. You can skip this step if you prefer to do it at a later time.

To specify system-wide settings

1. Click **Next** on the **Welcome to Sugar** screen to view the **Branding** screen.

   The Sugar logo, which is the default, displays as the current logo.

2. Enter the following information:

   Name. Enter the name that you want displayed in the title bar of your browser.

   Select Logo. Specify the image file, in .png or .jpg format, containing your organization's logo. Click **Browse** to navigate to the file's location and upload it. The recommended size of the logo is 212x40 pixels.

3. Click **Next** to view the **System Locale Settings** page.
4. Specify the default settings for displaying data format, such as time, date, and currency. To change the default language in Sugar for all users in your organization, select the language pack from the Language drop-down list.
5. Click **Next** to view the **SMTP Server Specification** page.
6. Specify the email account to send emails to Sugar users regarding assignment notifications and new user passwords.
   - To use Gmail, click **Gmail**, and enter the email address and password.
   - To use Yahoo, click **Yahoo**, and enter the email address and password.
   - To use Microsoft Exchange, click **Exchange**, and enter the server name and port number. To enter SMTP over SSL or TLS, select the appropriate option from the drop-down list. Optionally, to use SMPT authentication, enter the Exchange username and password.
   - If you are not using any of the above, click **Other**, and enter the name of the SMTP server, and optionally, enter the appropriate username and password for SMPT authentication.
7. To ensure that you can successfully send emails, click **Send Test Email** and check if the test email was received at the specified email address.
8. Click **Next**.

   To exit the screen and begin using Sugar, click **Finish**. This displays your Home page in Sugar.

9. To configure your user preferences, click **Continue**. For information on configuring User Preferences, see Accessing Sugar and setting your User Preferences.
10. To view options to perform other administrative functions such as creating users and teams, click the **Admin** link on the top right corner of your page to go to the Administration page.

The tasks that you can perform from this page are described below.

Users

This section describes how to manage teams, users, and roles.

- **User Management**
- **Team Management**
- **Role Management**
- **Password Management**

User Management

Use the User Management option to create, edit, activate, and deactivate users in Sugar. You can create a Regular User, a System Administrator, and a Group User.

A Regular user can access and use Sugar modules but does not have administrative privileges.

A System Administrator is a user who has administrative privileges in Sugar to perform tasks such as creating users. The System Administrator can access all modules and records. Role restrictions, discussed later in this chapter, do not apply to System Administrators.

A Group User is a bucket that is used for inbound emails, and does not count toward the number of Sugar licenses that you purchase for your organization. For example, creating a group mail account for Support creates a group user named **Support** to handle customer support issues. Users can distribute the emails to other users from the group inbox. You can create a group user from the Users Home page or when you create a group for incoming emails as described in Inbound Email.

The user name displays in the list on the Users Home page and the employees list on the Employees Home page after you create a Regular user or an Administrator. Group user names display in the Users list but not in the employees list.

You can assign users to roles and teams depending on the tasks they perform for the organization. If necessary, you can reassign a user's records to other users. For example, when a user leaves the organization you can reassign that individual's tasks to other members of the team.

Note: Inactive users do not count towards the number of Sugar licenses you purchase for your organization.

To create a regular user or an administrator user

1. Click **User Management** in the **Users** panel of the **Administration Home** page.

   This displays the **Users Home** page.

2. Select **Create New User** from the **Actions** drop-down list on the **Users** tab,and enter the following information under **User Profile**:

a. In the User Profile section, enter the user's name, user type, and current status. If you do not select a user type, the system creates a Regular user. If you have downloaded the person's photo in .jpg or .png format on your local machine, click **Browse** to navigate to the location and upload the picture into the record.

b. In the **Employee Information** section, specify information such as the user's current status, title, department, phone numbers, IM (Instant Messenger) type, and home address. You can add additional comments in the Notes field.

c. In the **Email Settings** section, you can set one or more email addresses for the user's mail accounts. You can further specify whether an email address is the user's primary email address or whether it will be used for an automated response to email. You can also specify an email client from the drop-down list, and specify the user's account information for the pre-configured email provider. For more information on setting up and configuring emails, see Configuring Email Settings.

3. If the system-generated password feature is not enabled, you can create a password on the Password tab. You can manually send the password to the user along with the username. Alternatively, you can enable the system to generate a temporary password automatically and email it to the user. For more information on system-generated passwords, see Password Management. The user will need a username and password to log into Sugar and change the password on the User Preferences page.

4. On the **Advanced** tab, you can specify default system settings, such as locale settings, as described in Editing your User Preferences. You can enable the Mail Merge option to enable Sugar Plug-in for Word to merge names and addresses from Sugar with form letter templates created in Word.

5. On the **Access** tab in the Detail View, you can add or remove a role to change the user's access permissions for a Sugar module, and to perform specific actions, such as editing and deleting records within the module. You can enable or disable access to any Sugar module and to any action within a module. By default, the user has permissions to access any module and perform any action.

   Scroll down the Access page, and in the Roles section, click **Select** to assign the user a role from the Roles list. For information on creating roles, see Role Management.

6. To create the user, click **Save**.

   Sugar creates the User record, and a corresponding Employee record. You can now assign the user to roles and teams.

To assign roles and teams to a user

1. Select the user from the **Users** list.

   This displays the user's Detail View page.

2. To assign a role to the user, scroll down the page, click **Select** in the **Roles** section and select one or more roles that you want to assign to the user.

   The user is assigned to the role, which is now listed in the **Roles** sub-panel.

3. To assign the user to a team, scroll down the page, click **Select** in the **My Teams** sub-panel and select one or more teams that you want to assign to the user.

   The user is assigned to the team, and the team is now listed in the My Teams sub-panel.

To reassign records to a different user

1. Select **Reassign Records** from the **Actions** list on the **Users** tab.

   This displays the **Reassign Records** page.
2. Select the user whose records you want to reassign.
3. Select the new user to whom you want to assign the records.
4. Select the new user's team, from the **Set Team** drop-down list if required. Use the default value of **No Change** if both users belong to the same team.
5. Select the modules to assign to the new user from the **Modules to include** list.

   Records related to the selected modules will be reassigned to the new user.
6. To assign specific records, select one or more filters from the **Filter** list. For example, to assign new and pending bugs only, you can select **New** and **Pending** as the filters.
7. Click **Submit** to reassign the records.
8. On the **Record Reassignment** page, do the following:
   a. If you are planning to use the Record Reassignment function with an existing workflow, select the **Verbose Output** checkbox.
   b. If you are planning on sending email notifications and adding record reassignments to the **Audit** table, check the **Include Workflow/ Notifications/Audit** checkbox.
9. Click **Continue** to proceed with the reassignment.

   This displays the **Record Reassignment Processing Accounts** page.
10. Click **Return** to return to the **Record Reassignment** page.

To manage user information

- To update the status of some or all users, including Sugar Users and Sugar administrators, select multiple records in the Users List View, and click **Mass Update** in the **Actions** drop-down list. For more information, see Editing and Deleting Multiple Records.
- To view a user's details, click the name in the Users list.
- To edit user details, click **Edit** on the user's Detail View page, change the information as needed, and click **Save**.
- To duplicate the user details, click **Duplicate** on the user's Detail View page, edit the information as necessary, and click **Save**. The following field values cannot be duplicated: **Publish key**, **Layout options**, **Email addresses**, **User Preferences**, and **Locale settings**.

- To import user data, click **Import** from the **Actions** drop-down list on the Users tab.
- To reset to the default values for User preferences, Homepage, or Dashboard, click the appropriate button in the Detail View.

To delete a user

1. Click the user's record in the List View.

   This displays the user's Detail View page.
2. Click **Delete**.

   Sugar displays a message alerting you that corresponding employee record will also be deleted, and that workflow definitions and reports involving the user must be updated.

To create a Group User

1. Select **Create Group User** from the **Actions** drop-down list on the **Users** tab.
2. Enter a username for the Group User in the **User Name** field. For example, you can enter **Support Queue** for the Support team.
3. In the **Status** field, select **Active** to indicate the Group User is being used; or else, select **Inactive**.
4. In the **Email Settings** section, set one or more email addresses for the user's mail accounts. You can further specify whether an email address is the primary email address or whether it will be used for an automated response to emails.
5. Click **Save** to create the user; click **Cancel** to exit the page without creating the user.

Team Management

Use the Team Management option to group users into teams to manage records in a secure manner.

Teams provide data security because users can access a record only if they are members of a team that is assigned to manage the record. Teams apply to every record in Sugar. All records are assigned to at least one team, and can be assigned to more than one team.

A user can belong to one or more teams.

The following teams are available:

- **Private**: Sugar creates a private team for every user. Only the user can access and manage records assigned to the user's own private team. Private teams include the reporting hierarchy. Users can see the records of any user who is below them in the hierarchy, regardless of their team membership.
- **Global**: This is the universal team. When users are created, they are members of the Global team by default. Every user can view records assigned to the Global team.
- **East**: This team is provided for your use and has no special characteristics.

- **West**: This team is provided for your use and has no special characteristics.

Note: You cannot delete the Global team.

Administrators are implicit members of every team, and can, therefore, see all records.

Users can be both explicitly and implicitly assigned to teams, and will appear as either **Member**, or **Member Reports-to**. When a user is manually, or explicitly, assigned to a team, the user's reporting hierarchy is implicitly added to the team as well. This ensures that members of the user's management hierarchy also have visibility into the user's records. For example, if Will and Chris both report to Jim, and Will is a member of the East team, and Chris is a member of the West team, then Jim will be an implicit member of the East and West teams. To delete Jim from the West team, either Chris must be removed from the West team, or he must no longer report to Jim.

Implicit members appear as **Member Reports-to** in the Membership column.

Implicit team membership has the following characteristics:

- Implicit team members cannot be removed from teams; the **Remove** icon does not appear next to their names.
- Implicit team members can also be explicitly, or manually, assigned to teams; the **Remove** icon will appear next to their names.
- Due to the implicit membership, clicking the **Remove** icon will not remove them from the team.
- To remove an implicit member from a team, either a down-level user in the reporting hierarchy must be removed from the team, OR the reporting hierarchy must be broken.

You can create any number of teams, depending on the needs of your organization. For example, based on the reporting hierarchy, you may want to create a team of users who report to the same manager. Based on product management requirements, you may want to create a cross-functional team of users who report to different managers but who manage the same product.

By default, all Sugar records such as accounts, contracts, and opportunities are assigned to a specific team and can only be accessed by the members of that team. If users spread across teams need to access a record, it can be assigned to multiple teams. In such cases, the user who creates the record can select a primary team and one or more secondary teams.

Note: Users who are assigned to a record can access it regardless of team membership.

To create a team

1. Click **Create Team** in the **Actions** drop-down list in the **Teams tab** or click the **Create** button in any Teams page.
2. Enter the team name (mandatory) and a brief description on the **Teams** page.
3. Click **Save**.

This displays the team's Detail View page. Follow the steps listed below to assign users to the team.

4. Click **Select** in the **Users** sub-panel in the team's Detail View page to view the **Users** list.
5. Choose the users you want to add to the team and click **Select**; to search for a user, use the Search field on the top of the page.

   The names of the selected users display in the Users sub-panel on the team's Detail View page.

To manage team information

1. To view a team's Detail View page, click the team's name in the Teams List View page.
2. To edit team details, click **Edit** on the Detail View page, change the information as needed, and click **Save**.
3. To duplicate the team details, on the team's Detail View page, click **Duplicate**, edit the information as necessary, and click **Save**.
4. To export team information such as team name and team ID, select the records in List View, and click **Export**. For more information, see the chapter on importing and exporting data.
5. To delete the team, click **Delete** on the Detail View page; to delete multiple teams, select the teams from the **Teams** home page, and click **Delete**. If the team has existing record assignments, follow the process described in the section below.

Delete Private Teams

Administrators can delete private teams associated with deleted users. Deleted private teams no longer appear in the User selection lists.

To delete a private team

1. Click the Admin link on the top right corner of your page to go to the Administration page.
2. Click **Team Management** in the **Users** section of the **Administration** page to view a list of teams in Sugar.
3. Click the checkbox associated with the team you want to delete.
4. Select **Delete** from the **Actions** drop-down menu.

Note: You must first delete the user before you delete the private teams associated with the user.

Creating Team Notices

For each team, you can create team notices to broadcast team-specific information to team members. These broadcasts display as a scrolling marquee in the Team Notices dashlet of the each team member's home page.

To create a team notice

1. Click **Team Notices** on the **Teams** tab.
2. Click **Create Team Notice** on the **Team Notice** home page.

   The **Team Notices** page displays on the page.
3. Enter information for the following fields:

   Date Start. Click the **Calendar** icon and select the date to begin broadcasting the team notice.

   Date End. Click the **Calendar** icon and select the date to end the broadcast.

   Team. Click **Select** to view the team from the team's List View; click a team name to select it.

   Status. Select **Visible** from the **Status** drop-down list to make the notice visible to team members; select **Hidden** to hide the notice.

   Title. Enter the message title.

   Description. Enter the message text.

   URL Title. Enter a title for the notice URL. This title is a hyperlink to the URL.

   URL. Enter the notice URL. The URL hyperlink is inserted into the Team Notices.
4. To create the team, click **Save**; click **Cancel** to exit the page without saving your changes.
5. To view the Team Notice list, click **Team Notices** on the Teams tab.

To manage team notices

1. To update the start date and end date of some or all notices, use the **Mass Update** panel on the **Team Notices Home** page as described in Editing and Deleting Multiple Records.
2. To edit a notice, click its title in the Team Notices list, revise the details as needed, and click **Save**.
3. To delete one or more notices, on the **Team Notices Home** page, select the notice you want to delete and click the corresponding **Delete** icon.

Role Management

Roles control user actions on records, teams control record data access. A role defines a set of permissions to perform actions such as viewing, editing, and deleting information. You can control user actions by using roles to restrict access to modules and module fields, and to limit the actions that a user can perform in Sugar.

System Administrators cannot be restricted with roles, and they can access any module and perform any action.

Users are affected by a role only if they are assigned to it. That is, users who are not assigned a role can, by default, access and take any action in any module. Users can have multiple roles assigned to them, and a role can be assigned to multiple users.

Some examples are:

- You can assign engineers in your organization to a role that prevents access to the Opportunities module.
- You can assign junior sales representatives to a role that allows them to edit opportunities, accounts, and contacts, but not delete them.

For more fine-grained access control, you can restrict access to specific fields within a module. For example, you can restrict access to the billing address within the Accounts module. You can grant limited access or hide the fields completely.

For organizations that would like to delegate ownership of specific tasks in certain modules to groups or individuals, Sugar provides different access types within roles. Roles can provide users with administrator access to manage all records in a specified module, and developer access to customize modules using the Developer Tools and to configure any administrative settings specific for the module.

The access types that Sugar provides through roles are as follows:

- **Normal**: The user granted this access type can view and manage records depending on team membership. Regular users are granted Normal access.
- **Admin**: The user granted this access type can administer all records in the specified module regardless of team membership. However, the user does not have access to administration tools, such as Studio and Workflow Management.
- **Developer**: The user granted this access type has developer privileges for the specified module. This allows the user to access the administration and development tools, namely Studio, Workflow Management, and Dropdown Editor, that are required to customize the module. Additionally, the user can access any administration tools that are available to manage the modules. For example, the user may be able to access the Releases tool for the Bugs module or the Time Periods tool for the Forecast module. However, appropriate team membership is required to view records in the module. Users with Developer access to Users, Teams, and Roles are allowed to manage users, passwords, teams, and roles.

Note: A System Administrator can access all modules and records. Developers with access to Users, Teams, and Roles cannot change a System Administrator’s privileges.

- **Admin & Developer**: The user granted this access type has both Administration and Developer privileges for the specified module. This allows the user to not only view and manage all records but also access administration and development tools available to manage the module. The user does not require team membership to view records in the module.

Administration tools available to module administrators with Developer access are as follows:

Module	Tool Group	Tools
Any Module	Developer Tools	Studio, Workflow, Dropdown Editor
Users/Teams/Roles	Users	User Management, Team Management, Role Management, and Password Management.

Module	Tool Group	Tools
Products	Products & Quotes	Product Catalog, categories, Types, Manufacturers, Shipping Providers
Bug Tracker	Bug Tracker	Releases
Forecasts	Forecasts	Time Periods
Contracts	Contracts	Contract Types

For complete control over record access, you must set access control at both the module level and the field level. For example, if the field level access is set to **Read Only**, and you want to restrict actions such as Edit and Delete at the record level, you must set access control at the module level.

All changes to roles such as changing role definitions, assigning, or revoking roles take effect when the assigned users log into Sugar after the change has been made.

Note: A user must not only belong to the appropriate role but also to the team assigned to a record in order to perform actions on that record. This is because records are assigned to a team to take action. Admin users can view any record.

Sugar provides the following set of Admin & Developer roles for your use:

- **Customer Support Administrator**: This role has administrator and developer privileges for Accounts, Bug Tracker, Cases, Contacts, and Knowledge Base.
- **Marketing Administrator**: This role has administration and developer privileges for Accounts, Contacts, Leads, Campaigns, Targets, and Target Lists.
- **Sales Administrato**r: This role has administrator and developer privileges for Accounts, Contacts, Forecasts, Forecast schedule, Leads, Opportunities, and Quotes.
- **Tracker**: This role grants access permission to create and manage tracker reports. Users assigned to this role can view the Tracker page and its contents in the Home module, run pre-defined tracker reports, and create custom tracker reports, you will need to add them to this role.

Creating Roles

When you create a role, you specify whether access is permitted or not, the modules that the role can access, the access type such as Normal (for Regular users) or administrator, and the actions that they can perform.

When a user is assigned multiple roles, the more restrictive settings prevail. For example, if a user is assigned to two roles pertaining to a module where one role grants administrator access and the other grants Regular User access, then the user has only Regular User access because it is more restrictive.

Not Set: A special case is the **Not Set** value in a role definition. You can use this setting to ensure that a role does not affect a particular setting. This allows simple roles to be constructed and then combined to achieve the desired security level.

For example, if users are assigned to both the following roles:

Role A, where Access Type = Admin and Export (action) = None

Role B, where Access Type = Normal and Export (action) = All

Then, users can see records that are assigned to the team to which they belong, but they cannot export the data.

If you change the Access Type to Not Set:

Role A, where Access Type = Admin and Export (action) = All

Role B, where Access Type = Not Set and Export (action) = None

Then the user can see all records in the module, but cannot export the data.

When new roles are created, the default value of Access, User Type, and Operations is **Not Set**. The default value of Not Set applies a permission to each role option as follows:

Access: Not Set = Enabled

User Type: Not Set = Normal

Action (Delete, Edit, etc): Not Set = All

When you create a role, you specify the following permissions for each Sugar module:

Access: This setting specifies which modules the role is permitted to access. Options are as follows:

- **Not Set**: Ensures that the role does not affect a particular setting. This is the default setting for new roles.
- **Enabled**: Permits the user to view the module.
- **Disabled**: Hides the module from the user's view.

Actions: This setting lists the following actions:

- **Delete**: Grants permission to delete records in the module. If **None** is selected, the **Delete** button is disabled on the Detail View page.
- **Edit**: Grants permission to edit records in the module. If **None** is selected, the **Edit** button is disabled on the Detail View page. Additionally, the user cannot use the **Mass Update** panel to update records for the module.
- **Export**: Grants permission to export record data in the module. The **Export** link located at the top of List View page is removed when this privilege is not available to the user.
- **Import**: Grants permission to import record data in the module. The **Import** link in the navigation bar does not appear when this privilege is not available.
- **List**: Grants permission to access the List View pages in the module.
- **View**: Grants permission to view records in the module.

You can specify who can perform each of the above actions. Options are as follows:

- All: All users who are assigned to the role can perform the action
- Owner: The person who created the record can perform the action
- None: Nobody can perform the action
- Not Set: Ensures that the role does not affect a particular setting

To create a role

1. Click the Role Management link in the Users section of the Administration page.

   This displays the Roles List View page.

2. Click the **Create Roles** List View page**.**

   This displays the **Roles >> Create** page**.**

3. Enter a name and description for the role.
4. Click **Save**.

   This displays the Detail View page of the role with a list of available modules along with the action type.

5. To specify access to a module, double-click the **Access** field corresponding to that module, and select the desired option from the drop-down list.
6. To specify the access type, double-click the **Access Type** field corresponding to the module, and choose the desired option from the drop-down list.
7. To specify who can perform a specific action, double-click the action field and select the desired option from the drop-down list.
8. To set field-level permissions, see To set field-level permissions for a module.
9. Click **Save**.

To set field-level permissions for a module

1. Select the role on the **Roles** List View page.

   This displays the role's Detail View page.

2. Select the module from the left pane.

   The current role permissions for the module display at the top and the module fields display below. A plus sign (+) next to a field name indicates grouped fields. For example, the Billing Street field also includes the city, state, postal code and country. The permissions that you set for Billing Street also apply to the other fields that are grouped with it. You can click the plus sign to view grouped fields.

3. To set permissions for a field, click **Not Set** and select one of the following options from the drop-down list:

   Read/Write. Permits role members to view and edit the field value.

   Read/Owner Write. Permits role members to view the field value and the record owner to view and edit the field value.

   Read Only. Permits all users, including record owners to only view the field value.

Owner Read/Owner Write. Permits only the record owner to view and edit the field value.

None. The field is hidden from all users.

4. Click **Save**.

Note: To restrict actions such as editing and deleting records, you will need to set access control at the module level.

You need to assign users to the role. You can do this now or at a later time.

To assign users to a role

1. Scroll down to the **Users** sub-panel in the role's Detail View page and click **Select**.
2. Select users from the **Users** list.

   The system assigns the selected users to the role and displays the username in the Users sub-panel of the **Roles** page. Alternatively, you can also assign users to a role in the **User Preferences** sub-panel of the User Management page. Role restrictions do not apply to Admin users.
3. Click **Save**.

To manage roles

1. To view the role details, click the role name on the **Roles** List View page.
2. To edit the role, on the Detail View page, click **Edit**, revise the information, and click **Save**.
3. To duplicate the access control information, on the Detail View page, click **Duplicate**, enter a new name for the role, and then click **Save**. Note that the users list associated with the role is not duplicated.
4. To delete the role, click **Delete** on the Detail View page.
5. To view access permissions for a specific user, select **List Roles by User** from the **Actions** drop-down list on the module's tab**,** and select the user from the adjacent drop-down list.
6. To remove a user, click the Remove **(rem)** icon corresponding to the user name in the **Users** sub-panel.

To view roles for a user

1. Click **List Roles by User** on the **Actions**drop-down list on the **Roles** tab.
2. Select the user from the drop-down list.

   This displays the details of the user's privileges for each module. The restrictions are then merged and the more restrictive settings across all roles are assigned to the user. You cannot change any of the privileges because they are associated with the role.

Password Management

As a System Administrator, you can use the Password Management section to create and manage passwords and password rules that apply to all users in your organization.

You can enable the System-Generated Password option to generate and send temporary passwords automatically to new users when you create a record for them. Users can log into Sugar with this password and create a new password for themselves on the User Preferences page. If you do not enable this option, you will need to create the password manually and provide it to the user.

You can create and manage templates to send system-generated passwords and links to reset passwords. Sugar provides default email templates to send system-generated passwords and links to reset user-generated passwords. You can view these two templates when you select Email Templates from the **Emails** tab**Actions**drop-down list. Sugar uses these templates, unless you specify a custom template. For more information on creating and editing email templates, see Creating Email Templates.

Sugar also provides an option to display the **Forgot Password** link in the Sugar Login window. Users who forget their passwords can click this link to submit their request for a new password. When Sugar receives such a request, it automatically sends a link to a page where the user can create a new password.

For security purposes, you can set an expiration date for user-generated password and system-generated passwords. When a password expires, you can send the user a system-generated link to the page where the person can create a new password. You can also set an expiration date for these page links.

Creating Password Rules

You can create password rules that specify password requirements for user-created password, for example minimum length, the number of characters, uppercase and lowercase letters, numbers, and special characters in passwords.

You can use regular expressions to specify characters and words that are not permitted in user-generated passwords. These rules display in the **Change Password** section of the User Preferences page. Users will have to follow these rules to successfully change their passwords.

When you enable new password rules, they apply only to new passwords. Existing passwords will work, even if they do not meet the requirements of the new password rules. When users attempt to reset their password using the Forgot Password feature or on their User Preferences page, they need to create a password that meets the criteria of the new password rules.

Securing Access to Sugar

You can also enable the Login Lockout feature to lock users out of the system after a specified number of failed login attempts. The system restores the ability to log in after the specified time interval has elapsed. Sugar displays an alert in the Detail View of the user's record to notify you that the user has been locked out.

As an additional precaution, you can enable Captcha validation to prevent automated programs from gaining unauthorized access to user accounts. You need to create an account with reCAPTCHA for your organization and obtain a public key and private key for your Sugar instance to use Captcha validation in Sugar. You need to enter these keys on the Password Management page. Navigate to the reCAPTCHA website at http://recaptcha.net/ and create the account. When you enable Captcha validation, the Captcha image displays in the Sugar Login window when a user clicks the Forgot Password link. The user must submit the characters from the image in order to receive the link to reset the password.

Enabling Authentication in Sugar

LDAP Authentication. You can enable authentication in Sugar if your organization has implemented Lightweight Directory Access Protocol (LDAP) or Active Directory authentication. When users in your system attempt to log into Sugar, the application authenticates them against your LDAP directory or Active Directory. If authentication is successful, the user is allowed to log into Sugar. You need to specify the encryption key for the system and forward it to your users if you are using LDAP with SOAP.

Users need to enter the key number in Outlook if they are using the Sugar Plug-in for Microsoft Outlook. The Sugar Plug-in for Microsoft Outlook uses this key to encrypt user passwords before forwarding them to Sugar for authentication. Sugar decrypts the password with the same key and forwards the user names and passwords to the LDAP server for authentication. Users are allowed to access Sugar through the Sugar Plug-in for Microsoft Outlook if authentication is successful.

SAML Authentication. If your organization has implemented Security Assertion Markup Language (SAML) for single sign-on, you can enable it in Sugar.

Note: Settings for Sugar password requirements, password reset, and password expiration are not applicable when LDAP authentication or SAML authentication is enabled.

To specify and manage password settings

1. Click **Password Managemen**t in the Users sub-panel of the Administration Home page.

   This displays the Password Management page.

2. You can specify the following information:

   Password Requirements. In this section, enter the minimum and maximum number of characters that passwords can contain. You can also specify more detailed requirements, such as uppercase and lowercase characters, numbers, and special characters that the password can contain.

   To enforce password rules, you can use regular expressions. Click **Show Advanced Options** to specify regular expressions. In the **Regex Requirement** field, enter specific characters and words that are not permitted in passwords. In the **Regex Description** field, you can enter a brief description of the Regex expression.

   Some examples of regular expressions in password rules are listed below:

   - Sugar - The password cannot contain the word **Sugar**.

- ([A-Za-z0-9])\1 - The password cannot repeat a letter or number consecutively; for example, **AA** or **88**.
- ([a-zA-Z]){4,}- The password cannot repeat any two consecutive letters. Repeat characters or letters must be separated by a number or a special character such as **%**.
- [\t] - The password cannot contain spaces and tabs.
- [@#$] - The password cannot contain @, #, or $.

System-generated passwords

You can enable Sugar to email a system-generated link to users who need to reset their passwords in this section. Ensure that you have configured an email server for outbound emails on the **Email Settings** page, and that you have valid email addresses for all your users.

For security reasons, you can set an expiration date for system-generated passwords. You can specify a time period or the number of logins after which the password expires. To specify a time period, select **Password Expires in** and enter the time period in days, weeks, or months. To specify the number of logins, select **Password Expires upon** and enter the number of logins.

User Reset Password

You can configure settings to enable users to reset their passwords using the **Forgot Password** link that displays in the Login Window in this section. By default this link is disabled for LDAP authentication purposes.

Enable Forgot Password Feature. This option, which is enabled by default, enables users who forgot their passwords to use the Forgot Password link on the Login window to submit their user name and email address to Sugar. The system automatically sends them an email with a link to the page where they can reset their password.

Generated Link Expiration. Use this option to specify whether the Forgot Password link expires or not. Select **None** if you do not want the link to expire. Or else, select **Link Expires in** and enter the time period in minutes, hours, or days, when the link remains active.

Enable reCAPTCHA Validation. You can select this option only when the Enable Forgot Password feature option is enabled. When you enable reCAPTCHA validation, the **Public key** and **Private key** fields display below. Enter the Public key and the Private key that you received from reCAPTCHA for your Sugar instance in the appropriate fields.

Change other admin passwords

System administrators are able to view the Password tab for all users, including other administrators, if the **Enable System-Generated Passwords** is not enabled in the **Password Management** section. Administrators are able to change the password within the **Password** tab in a user record.

To change another admin's password

Follow the steps listed below to change another system administrator's password:

1. Click the Admin link on the top right corner of your page to go to the Administration page.
2. Click User Management link in Users section.

   This displays the List View of users in Sugar.
3. Click the edit icon next to the user's name that you want to modify.
4. Click the Password tab and input old and new passwords.
5. Click Save.

Transfer admin rights to other users

In addition to changing each other's passwords System Administrators can transfer admin rights to other users.

To transfer admin rights to another user

1. Click the Admin link on the top right corner of your page to go to the Administration page.
2. Click User Management link in the Users section of the Administration page.
3. Click the user's name in the list of users displayed on this page.

   This displays the Edit View of the user's page.
4. Select System Administrator from the User Type drop-down list and click Save.

Email Templates

In this section, you can create message templates to use when sending out generated passwords and links to reset passwords.

Email template containing system-generated password. To create an email template for system-generated passwords, select **System-generated password email** from the drop-down list and click **Create**.

Email template containing system-generated link to reset password. To create an email template to send a link to users who forgot their passwords, select **Forgot Password email** from the drop-down list, and click **Create**.

Sugar creates the template and displays it in the Email Templates Home page. On the Emails tab, select Email Templates from the **Actions** drop-down list to view available email templates.

Note: If you choose to create your own templates to send passwords, copy the password variable provided in the default template, named System-generated password email, into your email template. The password variable is not available in the Insert Variable drop-down list of the Email Template form.

User-Generated Password Expiration. You can specify whether the user-generated password expires or not in this section.

Select one of the options listed below. The last two options ensure that users change their passwords periodically for the security of your Sugar application.

None. The password never expires.

Password Expires in. The time period, in days, weeks, and months, after which the password expires.

Password Expires after logins Enter the number of times a user can log into Sugar with the current password. When this number is met, the password expires and the user must specify a new password.

Login Lockout. In this section, you can specify how many times a user can unsuccessfully attempt to log in before being locked out of the system for security reasons, and when the lockout ends.

If you do not want to impose a lockout, select **None**. If not, select **Lockout users after unsuccessful login attempts** and enter the number of attempts a user is allowed. To enable login after a certain time period, select **Enable login again** after and enter the time period in minutes, hours, or days.

LDAP Support.

You can enable LDAP authentication in this section. If you are using LDAP authentication, you must disable the **Forgot Password** option.

To enable LDAP authentication, select the **Enable LDAP** box, and enter the following information in the fields below:

Server. Enter the LDAP server name.

Port Number. Enter the server's port number.

User DN. Enter the user DN name; for example, ou=people, dc=example, dc=com.

User Filter. Enter any additional parameters to apply when authenticating users. For example, `is_user_id=1`.

Bind Attribute. Enter the attribute name that is used to bind the user's name in LDAP. For example, in openLDAP, the attribute name is `userPrincipleName`.

Login Attribute. Enter the attribute name that is used to search for the user in LDAP. For example, in openLDAP, the attribute name is `dn`.

Group Membership. Select this checkbox if you wish to specify that the user is a member of a specific group, and enter the following information:

Group DN. Enter the group DN name; for example, `ou=groups, dc=example, dc=com`.

Group Name. Enter the group name; for example, `cn=sugarcrm`.

User Attribute. A unique identifier used to check if the user is a member of the group. For example, `uid`.

Group Attribute. The attribute of the group that will be used to filter against the User Attribute. For example, `MemberUid`.

Authentication. Select this checkbox to use specific user credentials to bind to the LDAP server, and enter the user name and password in the fields that display below.

Auto Create Users. Select this checkbox to create the user name in the Sugar database if it does not already exist.

Encryption Key. If you are using LDAP with SOAP, enter the encryption key to encrypt user passwords in the Sugar Plug-in for Microsoft Outlook. The `php_mcrypt` extension must be enabled in the *php.ini* file.

SAML Authentication.

Use this section to enable SAML authentication. You must disable the **Forgot Password** option if you are using SAML authentication.

Select the **Enable SAML Authentication** checkbox and enter the following information:

Login URL: Enter the SAML URL for authentication. This is the path to the SAML server you are authenticating to.

X509 Certificate: Enter the SAML X.509 certificate public key.

5. Click **Save**.

Sugar Connect

This section includes the following options:

- **Sugar Support Portal**
- **Sugar Updates**
- **Online Documentation**
- **License Management**

Sugar Support Portal

Use this option to access the SugarCRM forums, search FAQs (Frequently Asked Questions), download the latest Sugar version, buy network subscription, log into the network, file bugs, research reported bugs, and request new features.

The SugarCRM forums cover discussions on a broad range of topics such as setting up the Sugar application and Frequently Asked Questions (FAQs) . You need to register your organization with SugarCRM to participate in the discussions. You can view postings on any of the Sugar forums without registering your organization.

Sugar Updates

Use this option to check automatically or manually for Sugar updates. By default, the option to check for updates automatically is enabled.

If you choose to check for Sugar updates automatically, you will be notified when new Sugar versions or updates are available. To perform a manual check, uncheck the **Automatically Check for Updates** option and click **Check Now**. If you already have the latest version, **You have the latest version available** message displays at the bottom of the panel.

Online Documentation

Use this option to view and download PDF copies of available documentation on installing and using the Sugar application and plug-ins.

License Management

Use this option to manage Sugar licenses for your organization.

Sugar administrators also count towards the number of licenses purchased by an organization.

SugarCRM provides a Download Key number to download the application. During installation when you purchase Sugar. You need to enter the key number along with associated information, such as the expiration date. This information is displayed in the **License Management** sub-panel and you can edit it, if necessary. When you save the updated information, the system automatically checks it against the information in SugarCRM database. If the information in the SugarCRM database is different from what you entered, then it overrides your revised information. For example, if you change the expiration date, the system checks the SugarCRM database for the expiration date based on when you purchased the application. If that number is different, then the **License Management** panel will override your change with the expiration date stored in the SugarCRM database. Contact Customer Support if the displayed information is incorrect.

Typically, licenses are purchased for one year. Periodically re-validate the license information with SugarCRM during this time. Sugar automatically re-validates the license information twice a week if you enable automatic checks for Sugar updates as described in Sugar Updates. Manually revalidate the license information once every three months if you have not enabled automatic Sugar updates or if you have a firewall. Sugar displays the date and time of revalidation in the **License Validation** sub-panel if the revalidation is successful.

Sugar exhibits the following behavior if you do not update the license when it expires:

A warning message is displayed stating that the license has expired and requesting the new license key. You have three months from the date of the warning to update the license information. If not, at the end of three months, Sugar displays a warning stating that a lockdown will occur in 30 days. Sugar locks the application if 30 days pass without license validation.

Although users are locked out of the system, administrators can still login to access the **License Management** section of the **Admin** page and enter the new license key.

To edit or update license information

1. Click **License Management** in the **Sugar Connect** sub-panel in the **Administration** page to view the **License Properties** page.

   This page displays sections for **License Management** and **License Validation**.

2. Click **Edit** in the **License Management** section, and enter information for the following fields:

   Download Key. The download key that you received from SugarCRM when you purchased the application.

   Expiration Date. The date when the license expires.

   Number of Users. The number of users the license allows.

3. Click **Save** to save the information.

   When you enable automatic checks for Sugar updates, the system automatically revalidates the license when you save the information. The revalidation date and time display in the **License Validation** sub-panel.

   Check the proxy server configuration in the System Settings panel as described in Proxy Settings if automatic revalidation fails. Follow the steps listed below to manually revalidate the license.

To manually revalidate license information

1. To revalidate the license information, click **Re-validate** located above the **License Validation** panel.

   The system communicates with the License Validation server to validate your license.

2. If the system fails to connect with the License Validation server for any reason, use the **Manual Validation** link located at the bottom of the panel.
3. In the **Manual Validation** panel, click **Export Download Key** to export the *sugarkey.lic* file.

   The system displays the **Opening sugarkey.lic** dialog box.

4. Select **Save to Disk** to copy the *sugarkey.lic* file on your local machine and click **OK**. Your machine must have a browser and Internet access.
5. Go to *http://updates.sugarcrm.com/license* and submit the *sugarkey.lic* file for validation.
6. If validation is successful, the system prompts you to save the file.

   By default, the file is named *sugarvalidationkey.lic*, but you can change the name if necessary.

7. Log into your Sugar installation and navigate to **Admin > License Management > Manual Validation**.
8. Browse to the location of the *sugarvalidationkey.lic* file on your local machine and click **Import**.

   Sugar updates the validation status for the download key.

System

This section includes the following options to configure system-wide settings that apply to all users in your organization.

- **System Settings**
- **Upgrade Wizard**
- **Locale**
- **Backups**
- **Currencies**
- **Repair**

- Scheduler
- Diagnostic Tool
- Themes
- Tracker
- Activity Streams
- Connectors
- PDF
- Mobile
- Global Search
- Languages

System Settings

Use this option to configure the system-wide settings according to your organization's specifications. Users can override some default settings, such as the datetime format, on their User Preferences page

User Interface

Use this section to configure the user interface.

To configure the user interface

1. Configure the following fields:

   Listview items per page. Enter the maximum number of records you want displayed in the list view. The system paginates lists that contain more than the specified number of records.

   Prevent user customizable Homepage layout. Select this box if you want to prevent users from moving Sugar Dashlets on the Home page. However, users can still create additional Sugar Dashlets and pages.

   Maximum number of Sugar Dashlets on Homepage. Enter the maximum number of Sugar Dashlets you want displayed on the Home page. Users will not be able to add more than the number of Sugar Dashlets that you specify. The default value is 15.

   Display server response times. This option is enabled by default. The footer on every page displays the time taken to respond when users attempt to perform an action, such as logging in or opening an item, in Sugar. Deselect this option if you do not want to display the response time.

   System Name. This field displays your system name.

   Current Logo. This field displays your organization's logo that currently displays in the User Interface.

   Select Logo. Enter the path to the location of the logo that you want to upload from your local machine. Or, click **Browse** to navigate to the location of the logo on your local machine. The dimension should be 212 X 40, with the standard transparent background color, in PNG or JPG format.

Subpanel items per page. Enter the maximum number of records you want displayed in the List View. The system paginates lists that contain more than the specified number of records.

Subpanel items per page (Mobile). Enter the maximum number of records you want displayed in the list view when users log into Sugar from a wireless device. The default is three records per page. The system paginates lists that contain more than the specified number of records.

Prevent user customizable subpanel layout. Select this box if you want to prevent users from dragging and dropping sub-panels to a different location in their Detail View layout.

Show Full Name. Select this box if you want the full name for users displayed instead of their login names.

Use module icon as favicon. Select this option if you want to display the module icon in the browser's navigation tab instead of the Sugar icon, which is the default. For example, when you are in the Accounts module, the navigation tab will display the Accounts icon.

2. To save the settings, click **Save**.
3. To restore the default settings, click **Restore**; to exit the page without saving your changes, click **Cancel**.

Proxy Settings

If you are using a proxy server to connect to the web, you will need to enter the information here to allow the system to check for Sugar updates and to validate license keys as described in License Management.

1. Configure the following fields:

   Use proxy server. If you want to connect to the web through a proxy server, select this option.

   The system displays fields to specify the proxy host and port number.

   Proxy Host. Enter the name of the proxy server host

   Port. Enter the port number for the proxy host.

   Authentication. Select this box if you want to enable proxy authentication to allow Sugar to connect to the company's proxy server.

   User Name. Enter the user name.

   Password. Enter a password for the user.

2. To save the settings, click **Save**; to restore the previous settings, click **Restore**; to exit the System Settings page without saving your changes, click **Cancel**.

SkypeOut

Select this option to allow users to click a phone number field to make calls through Skype.

To enable Skype

1. Select the **Enable SkypeOut integration** box.
2. To save the setting, click **Save**; to restore the previous setting, click **Restore;** to exit the System Settings page without saving your changes, click **Cancel**.

Mail Merge

If your users have installed the Sugar Plug-in for Microsoft Word, this option allows them to perform a mail merge with Word documents. For example, you can merge contact information from Sugar with form letters created in Microsoft Word. The Mail Merge link displays at the top of a List View.

Note: Users must also select the Mail Merge option on their User Preferences page.

1. Select the **Enable mail merge** box.
2. To save the setting, click **Save**.

   To restore the previous setting, click **Restore**; to exit the System Settings page without saving your changes, click **Cancel**.

Advanced

1. Select any of the following advanced configuration options:

   Validate user IP address: For security reasons, by default, this option is enabled to validate the IP addresses of users who log into Sugar.

   Note: Some high availability systems may change IP addresses for load balancing purposes. If the IP address changes during a user session, the user will be logged out, and will have to log back into Sugar.

   Log slow queries. Select this option to log the system's slow responses to user queries in the *sugarcrm.log* file. This information is for performance tuning investigation.

   Maximum upload size. Enter the maximum file size, in bytes, that users are allowed to upload.

   Note: The upload size is also dependent on PHP's upload settings.

   Log memory usage. Select this option to record memory usage in the *sugarcrm.log* file.

   Slow query time threshold. Specify a threshold, in milliseconds, to define slow queries. Queries that take longer than the threshold time are logged in the *sugarcrm.log* file. This information is for performance-tuning investigation. If you have enabled the Tracker Queries option on the Tracker Settings page, you can run the pre-defined Slow Queries report to view slow queries.

   Display stack trace of errors. When you select this option, if an error occurs when users are running the application, the system displays where the error occurred in the application's stack trace. This information is for debugging purposes.

Developer Mode. Select this option to disable caching so that you can immediately view changes made to language, vardefs, and template files.

vCal Updates Time Period. Select this option to specify the number of months in advance of the current date that Free/Busy information for calls and meetings is published. The minimum value is one month, and the maximum value is 12 months. To turn off Free/Busy publishing, enter **0**.

2. To save the settings, click **Save**.
3. To restore the previous settings, click **Restore**; to exit the System Settings page without saving your changes, click **Cancel**.

Logger Settings

The Sugar Logger logs events that occur in the Sugar application. By default, the logs are written to *sugarcrm.log* in the Sugar root directory. Hence, if a problem arises, you can refer to the log file for information that may help in troubleshooting it.

When you upgrade Sugar, the application parses your Logger settings automatically from the *log4.php* properties file of your previous Sugar version, and populates the Logger Settings sub-panel with the information.

You can, however, change the settings if necessary.

The logging levels are as follows:

- **debug**: Logs events that help in debugging the application.
- **info**: Logs informational messages.
- **warn**: Logs potentially harmful events.
- **error**: Logs error events in the application.
- **fatal**: Logs severe error events that leads the application to abort. This is the default level.
- **security**. Logs events that may compromise the security of the application.
- **off**. The logger will not log any events.

When you specify a logging level, the system will create log files for the specified level as well as higher levels. For example, if you specify `'Error'`, the system creates log files for `'error'`, `'fatal'`, and `'security'`.

The default size of a log file is 10 MB. Downloading large log files from the web server can be a slow process. Hence, if you view log files frequently, it is recommended that you view actions that occurred since the last entry in the current log file.

To configure logger settings

1. In the **Logger Settings** panel, enter the following information:

   Log File Name. Specify a name for the log file.

   Extension. Enter the file extension. The default is.log.

Append After File Name. From the drop-down list, select a time period to append to the file name. This makes it easier to identify the log that you want to view.

Maximum Log Size. Specify the maximum size of the log file in MegaBytes (MB). The default is 10MB.

Log Level. From the drop-down list, select the event level that you want to capture in the log file. The default is **fatal**.

Default Date Format. Enter the default date format for the log file. This format must be supported by strftime. The default is %c.

Maximum Number of Logs. Specify the maximum number of log files to save. When the number of log files exceed this limit, Sugar deletes the log file that was created first. The default is 10 logs.

Configure Log Settings. Click this link to view the Sugar log file, as described in To configure log settings.

2. To save the settings, click **Save**.
3. To restore the previous settings, click **Restore**; to exit the System Settings page without saving your changes, click **Cancel**.

To configure log settings

1. In the **Logger Settings** panel, click the **Configure Log Settings** link.
2. Select one of the following:
   - **All.** Select this option to view the entire log for the current session.
   - **Next.** Select this option to view only new entries in the log file.
   - **Mark Point**. Select this option to indicate that you want to view actions that were logged after the last entry in the current log file. Then click **Refresh From Mark** to view actions that occurred since the time you clicked **Mark Point**.

   For example, to debug a problem, select the **debug** logging level on the **Logger Settings** page, click **Configure Log Settings**, and then click **All** to view all user actions in the log file. To view only new user actions since the time you clicked **All**, click **Next**. This action will display only new entries in the log file. To view new user actions since the last entry in the current log file, select **Mark Point** and then click **Refresh from Mark**. This action will append new entries to the current entries in the log file.
3. To search the log by keyword, enter it in the **Search** box. To search for entries using a regular expression, enter it in the Search box, and select the **Reg Exp** box. Press **Enter** on your keyboard to begin the search.

   Note: The **Ignore Self** option is not used.

   Sugar displays the log entries on the screen.

Upgrade Wizard

When you obtain the Sugar upgrade zip file from Sugar, you can save it to your local machine and upload it into Sugar using the Upgrade Wizard. For more information, see Upgrading Sugar.

Locale

Use this option to set system-wide default formats for date, time, language, name, and currency. If you are using MySQL, you can also specify the collation order for records in the application.

User Interface: Use this section to set the default values in the Sugar User Interface.

Default Date Format. Select a date format for all records such as Quotes and Contracts from this drop-down list. Users can override the default format by setting a different date format in their User Preferences page.

Default Time Format. Select a time format from this drop-down list to display in all records such as Cases. Users can override the default format by setting a different time format in their User Preferences page.

Default Language. Select the default language for the Sugar User Interface from this drop-down list. Users can select a different language from the login page, provided they have installed the appropriate language pack. For more information on displaying/hiding available languages, see **To display/hide available languages**.

Default Name Format. Enter the default salutation and name format to display in list views and detail views. You can specify any combination of salutation first name, and last name. For example: Mr. John Smith, Mr. Smith, or John Smith. Users can override the default format by setting a different time format in their User Preferences page.

Default Currency. Use this section to override the default currency that you set during installation. On the User Preferences page, users can override the default currency that you specify in this panel.

Currency. Enter the name of the currency that your organization uses to conduct business.

Currency symbol. Enter the symbol for the currency.

ISO 4217 Currency Code. Enter the ISO code for the currency.

1000s Separator. Specify a delimiter to separate thousands when users specify a numeric value for the amount.

Decimal Symbol. Specify a default decimal symbol.

Export Settings

Use this panel to specify export settings such as the delimiter used to separate data in export files, and the default character set used to export data from Sugar. The settings you specify here apply to all users in the organization. However, users can define a different default export character set on their User Preferences page to export data from Sugar.

This character encoding is also used when importing data into Sugar.

By default, Sugar uses UTF-8 to store and export data. For locales that use character encoding other than UTF-8, you must specify the appropriate default character set. This ensures that the character set Sugar uses to create the exported file is mapped to the correct character set on the user's machine. For example, MS Windows uses SJIS in Japan. So, for users in this locale, you will need to select SJIS as the default export character set.

By default, both users and administrators can export files from Sugar. However, you can prevent users from exporting files.

Export Delimiter. Specify the delimiter, such as a comma or a period, to use while exporting data.

Default Character Set for Import and Export. The default is UTF-8. For locales other than US and Western Europe, select the appropriate character set from the drop-down list.

Disable export. Select this option if you want to prevent end users and users with administrative privileges from exporting data.

Admin export only. Select this option to allow only users with administrative privileges to export data.

Database Collation

Sugar displays this sub-panel only if you are using the MYSQL database. This setting manages the connection layer between SugarCRM and your MySQL database, and should be set to match the collation of your database tables. You can select the desired collation order from the drop-down list. The default is `utf8_general_ci`. Changing this setting will not alter your existing tables, and all new tables created after this change will inherit the **collation setting** name.

CAUTION: The database will return errors if you run queries against multiple tables, and if tables in the query have a different collation.

To save the settings, click **Save**; to exit the page without saving your changes, click **Cancel**.

Backups

Use this option to backup the Sugar configuration files. Note that this option does not backup the database.

To backup Sugar configuration files

1. Click the **Backups** option in the **System** sub-panel on the **Admin** page.
2. In the **Directory** field, specify a directory that is writable by the same user as the Apache process.
3. In the Filename field, enter a file name for the zip file including the .zip extension.
4. To ensure that backup can be performed, click **Confirm Settings**.
5. Click **Run Backup** to create the .zip file of your Sugar application files.

Note: To backup your database information, refer to your database vendor's documentation.

Currencies

Use this option to define a new currency and rate.

For each new currency that you define, enter the name, symbol (for example, $), conversion rate to the US $, the currency code (such as CDN for the Canadian dollar). Set the **Status** to **Inactive** if you do not want users to use this currency for transactions.

Note: To display the Euro symbol in charts, you will need to install Macromedia Flash8.

Repair

Use this option to upgrade and rebuild data from a previous version of Sugar for the current version of the program.

The options are listed below.

Quick Repair and Rebuild: Repairs and rebuilds the database, extensions, vardefs, Sugar Dashlets, and so on for selected modules. Click this option, select the modules you want to repair, and click **Repair**. You also use this option to clear any custom My Activity Stream link types from the cache.

Upgrade Teams: Scans all users to ensure that they each has a personal team, and that they are members of the global team, automatically fixing any discrepancies after an upgrade. It may also be useful to restore the private teams for all users in the event they become corrupted or are removed for any reason.

Expand Column Width. Expands certain char, varchar, and text columns in MSSQL database.

Rebuild .htaccess file: Rebuilds the *.htaccess* file to limit access to certain files directly.

Rebuild Config File: Rebuilds the *config.php* file by updating the version and adding defaults when not explicitly declared. Click this option to check the file and, if necessary, click **Rebuild**.

Rebuild Extensions: Rebuilds extensions including extended vardefs, language packs, menus, and administration

Rebuild Relationships: Rebuilds relationship metadata and drops the cache file.

Rebuild Schedulers: Rebuilds your default Scheduler Jobs. Click this option and then click **Rebuild**.

Rebuild Sugar Dashlets: Rebuilds the cache file for Sugar Dashlets.

Rebuild Workflow: Rebuilds the workflow cache and compiles plug-ins.

Rebuild Javascript Languages: Rebuilds Javascript versions of language files.

Rebuild JS Compressed Files: Copies original Full JS Source files and replaces existing compressed JS files.

Rebuild JS Grouping Files: Re-concatenates and overwrites existing group files with latest versions of group files.

Rebuild Minified JS Files: Copies original Full JS Source Files and minifies them, then replaces existing compressed files.

Repair JS Files: Compresses Existing JS files - includes any changes made, but does not overwrite original JS Source files.

Repair Non-Lowercased Fields: Repairs mixed-case custom tables and metadata files to fix issues where code expects lowercase field names.

Repair Teams: Rebuilds private team membership based on user reporting hierarchy. Click this option, select one or all of the following: Global team, Private team, and team hierarchy, and click **Rebuild**.

Repair Roles: Repairs roles by adding all new modules that support access control as well as any new access controls to existing modules.

Repair Inbound Email Accounts: Repairs Inbound Email accounts and encrypts account passwords.

Remove XSS: Removes XSS Vulnerabilities from the database. Click this option, select a module, and click Execute. If any XSS strings are found, the system lists them in the **Object(s) found** field below.

Repair Database: This option is applicable to MYSQL databases only. It repairs your Sugar database based on values defined in the vardefs. You can choose to display the SQL that will be executed on the screen, export it, or execute it.

Repair Activities: Repairs Activities (Calls, Meetings) end dates.

Check Reports: Checks whether reports are still valid after an upgrade and lists any invalid reports that are found during the check.

Enable/Disable Seed Users: Enables or disables seed users populated during demo installation. Click this option, and if the seed users are enabled, click **Deactivate** to disable them. If the seed users are disabled, click **Activate** to enable them.

Scheduler

Use the Scheduler to ensure timely execution of custom processes such as workflows and email campaigns. You can schedule jobs such as monitoring inbound emails, executing workflows, running reports, and dispatching campaign emails.

The Scheduler integrates with external UNIX systems and Windows systems to run jobs that are scheduled through those systems.

You can schedule the following types of job:

> **Prune Tracker Tables**. This job removes entries from the tracker and tracker_sessions database tables if they are older than the number of days specified on the Tracker Settings page.

Check Inbound Mailboxes. This job monitors inbound emails in active mail accounts that you set up using the Inbound Email option in the Email panel of the Admin page.

Run Nightly Process Bounced Campaign Emails. This job polls any mail account in which, the **Possible Actions** parameter is set to **Bounce Handling**. This is an essential component of monitoring mass email campaigns.

Run Nightly Mass Email Campaigns. This job processes the outbound email queue for your organization's mass campaign emails.

Prune Database on 1st of Month. This job reads all the tables in your Sugar database, finds records that have been soft-deleted (deleted = 1), creates a large SQL file, and physically deletes those records on the 1st of every month. It is mostly a performance job, and is not essential to the use of Sugar. The backup files are placed in *cache/backups* with time-stamped filenames.

Process Workflow Tasks. This job processes workflow events. If you set a timed trigger for an event, for example, when a lead is a week old, then it finds the predefined workflow actions and fires them when appropriate.

Run Report Generation Scheduled Tasks. This job runs reports and emails them to the assigned user as per the schedule specified for a given report. The reports are sent to the user through an email from a PHP script that runs at regular intervals to send out the emails at the appropriate time. The user can choose which reports to receive and how often to send the reports in the Reports module of the Sugar application.

Update Tracker Session Tables. This job sets all active entries in the tracker_sessions table to be inactive if they are older than 20 minutes. The tracker_sessions table keeps track of the current number of users logged into the system and the time of their most recent activity. A user session will be marked as inactive if the user has not registered a tracker entry in the past 20 minutes.

Configuring Settings for Scheduler Jobs

For Microsoft Windows, you can use the Task Scheduler. For UNIX and Linux systems, you will need to add a new cron job to the crontab.

To add a new cron job to your crontab for Unix and Linux Systems

1. At the command prompt, type `crontab -e`.
2. Add the following line to your crontab using the full path to the PHP directory in your Sugar installation:

   ```
   *    *    *    *    * cd /path/to/sugar; /path/to/php -c/path/to/php.ini -f cron.php /dev/null 2>&1
   ```

   where:

   path/to/sugar is the path to where your Sugar installation resides.

   path/to/php is the path to the PHP installation that you want to use.

   path/to/php.ini is the path to the PHP configuration file that you want to use.
3. Save your changes and close.

If you encounter problems, do the following:

1. Determine the user ID that Apache server uses to run.

   In a properly configured virtual host environment provided by your host, Apache will run as your Login User ID for files in your virtual directory. If you are unsure, contact the Customer Service department for your host.

   a. Search for a file named *httpd.conf*. Typically, this file is located in the */etc* folder. It will vary with the distribution.

   b. Open the file using a text editor and locate the line that starts with "User". The name that follows it directly is the name of the user that Apache will run as on your system.

2. Determine the capabilities of your PHP installation.

   The Sugar Scheduler is designed to work with PHP and its extensions; specifically, the database Connector, the IMAP libraries, and the cURL libraries.

   Ensure that the PHP binary (php-cli or just php) is available and has those libraries available.

   Search for the PHP binary as follows:

   a. Type `which php`. On most correctly configured PHP installations, you will find the binary in */usr/bin or /usr/local/bin*. If so, move on to Step number 3.

      Or

   b. Type `find / -name php`. Typically, this command will return a long list. Parse through the list to find an executable file named *php*.

   c. If you cannot find the PHP binary, scroll down to the *Troubleshooting Tips* at the end of this section and read item number 2.

3. Create a cron job for the Apache user

   a. Type `crontab -e -u` [the Apache user].

   b. Enter the following line to your crontab:

      ```
      *   *   *   *   * cd /path/to/sugar; php -f cron.php > /
      dev/null 2>&
      ```

   c. To fine-tune this job, change the first two ***s**. The first is the **Minutes** value, the second is the **Hours** value.

   For example, to run the cron job every three minutes, enter:

      ```
      "*/3   *   *   *   *   cd /path/to/sugar; php -f cron.php>
      /dev/null 2>&1
      ```

4. Test the crontab line as follows to confirm that your system is ready to run:

   a. At a terminal prompt, copy and paste the command for your cron job, and run it; the logic here is that if the command will execute successfully when run manually, the crontab will be able to execute successfully as well.

   b. If your cron job looks as follows:

      ```
      *  *  *  *  *  cd /var/www/html/sugarcrm; path/to/php -f
      cron.php > /dev/null 2>&1
      ```

      Enter the command from "cd.." to "2&>1" into a terminal and press **Enter**.

   c. If any errors occur, refer to Troubleshooting Tips.

5. Save your changes and close.

To add a new cron job to your crontab for Microsoft Windows (2000, XP, Server)

Set up the Windows batch file as follows:

1. Create a batch file that will execute all the necessary commands.
2. Enter the following paths in the batch file:
   - `cd c:\`***`path\to\Sugarinstance`***

     where ***`SugarInstance`*** is your Sugar installation.

     This folder should contain the *cron.php* file.
   - `c:\`***`path\to\php.exe`*** `-c c:\windows\php.ini -f cron.php`
3. Run the batch file from a command prompt to ensure that the output has no errors.
4. If you encounter problems, do the following:
   a. Determine the PHP binary to use for PHP 5.2.x.

      For the 5.2x version of PHP, the PHP-CGI binary is named *php-cgi.exe* (*not* php-cli.exe) and is typically located in the root folder of your PHP install folder. To allow it to interact with the dynamic libraries, specify the location of the *php.ini* file. This can vary from system to system. If you are unsure, enter the command described above.

      The system will identify the *php.ini* file and its location.
5. Create the batch file.
   a. Click **Scheduler** in the Systems panel of the **Admin** page.

      At the bottom of the default screen, you will see the contents of the commands you need to add to a batch file.

   b. Open *notepad.exe*, copy and paste what Sugar's recommendation into a blank file.
   c. Change the Save As Type to "dropdown to All Files *.*. " and save it as a .bat file.

   Note: This is only a recommendation. It may not work for your particular instance. Check the folder paths because they are often the cause for problems with the Scheduler.

6. Test the batch file.
   a. From the command prompt, navigate to the folder where you saved the batch file.
   b. Enter the full name of the batch file to execute it.
   c. Note and correct any reported errors, usually related to paths that cannot be found.
7. Create a scheduled task.
   a. Click **Start** and navigate to Control Panel/Scheduled Tasks/Add Scheduled Task.
   b. Go through the Wizard, browse to the batch file you just created, and select it.

c. Schedule a daily job, and ensure that you select **Open advanced properties for this task when I click finish**.

d. On the Advanced Properties page, navigate to the **Schedule** tab, and click **Advanced**.

e. Check off **Repeat task** to enable the fields below it, and select **Every Minute** or specify the interval you think is appropriate.

8. Save your changes and close the Wizard.

To schedule a job

1. On the **Scheduler** tab**Actions** drop-down list, click **Create Scheduler**.
2. In the Basic Setup sub-panel, enter the following information:

   Job Name. Enter a name for the job.

   Status. From the drop-down list, select **Active** to run the job at the specified intervals; select **Inactive** if you want to save the job schedule information but not run the job.

   Job. Select a job from the drop-down list, or to run a script from a web server, enter the URL in the adjacent field.

   Interval. Specify the time interval to check for new scheduled jobs.

   By default, Sugar displays the basic option. Use this option to specify the time interval in minutes and hours. The default is every one minute daily.

   To define a specific time, click the **Show Advanced options** link, and enter the time in minutes, hours, date, month, and day.
3. In the **Advanced Options** sub-panel displays below, enter information for the following fields:

   Execute If Missed. Select this box to run any jobs that the scheduler missed.

   Date & Time Start. Click the **Calendar** icon and select the start date for the job; select the time, in hours and minutes, from the adjacent drop-down list.

   Date & Time End. Click the **Calendar** icon and select the end date for the job; select the time, in hours and minutes, from the adjacent drop-down list.

   Active From. From the drop-down list, select the time, in hours and minutes, when the job becomes active.

   Active To. From the drop-down list, select the time, in hours and minutes, when the job becomes inactive.
4. Click **Save** to create the job; click **Cancel** to exit the page without creating the job.
5. To export one or more scheduler definitions in a .csv file format to a local machine, select them from the list and click **Export**.

To manage scheduled jobs

1. Navigate to the **System** sub-panel on the **Admin** page, and click **Scheduler**.

   Sugar displays the **Schedule List** page on the screen.

2. Select any job from the job list to view its settings or the Job log. You can edit, duplicate, or delete the settings. You can also delete a job by clicking the **del** icon corresponding to the job in the Schedule list.
3. To edit the settings, click **Edit**.
4. Make the necessary changes and click **Save** to update the settings; click **Cancel** to exit the page without saving your changes.

Troubleshooting Tips

Linux

1. The Sugar Scheduler fails to run even though the *cron.log* file shows that the crontab is triggering the new job.
   - The Apache user's PATH does not include the location of the PHP binary.
     - Change the crontab entry to include the FULL path to the PHP binary as shown below:

       ```
       * * * * * /usr/local/bin/php -f cron.php > /dev/null 2>&1
       ```
   - The Apache user's PATH does not include the location of the *php.ini* file, and thus the external libraries (such as *mod_mysql* and *mod_imap*) are unavailable at run time.
     - Change the crontab entry to include a PHP switch to explicitly define a php.ini to use as shown below.

       ```
       * * * * * php -c /path/to/php.ini -f cron.php > /dev/null 2>&1"
       ```
2. No PHP binary found or it is broken.
   - Change the mechanism by which your cron job calls Sugar's *cron.php*.
     - Determine if this is an option at this time by finding either **curl** or **wget** on your system. This is done with the commands **which curl** and **which wget**.

       If you use *cURL*, your crontab entry should look as follows:

       ```
       * * * * * curl --silent http://Domain/sugarInstance/cron.php
       ```

       where ***Domain*** is the website where your Sugar installation resides, and ***sugarInstance*** is your Sugar installation.

       If you use *wget*, your crontab entry should look like:

       ```
       * * * * * wget -q http://Domain/sugarInstance/cron.php
       ```

Note: Both *curl* and *wget* have numerous switches that do not always map to different versions on different platforms. Experiment in the terminal until you find the perfect line, and add it as the line for your crontab entry.

Windows.

1. The most common problem is that the PHP binary does not have the proper libraries available at run time. As a result, it cannot make calls to your database or

to your Email server. To force PHP to be aware of these libraries, it needs to access the *php.ini* file, which in turn tells it where to find everything that is available.

a. Locate the *php.ini* file: if you are unsure, run the following command:

```
phpinfo();
```

The system identifies the *php.ini* file and its location.

2. The second most common breakage is incorrect paths to the extensions that PHP needs; a map is useless if the information is bad.

   a. Open *php.ini* in your favorite text editor.

   b. Find the section named **Paths and Directories**.

   c. The relevant entry is `extension_dir`.

   d. Keeping in mind that this file piggybacks on Window's $PATH$ variable, double-check the paths listed.

   e. Correct any errors - sometimes giving an absolute path solves hard-to-diagnose problems, for example, full path listing from c:\... onwards.

   Necessary extensions are disabled.

   f. Open your *php.ini* file in a text editor.

   g. Find the section named **Dynamic Extensions**.

   h. Scroll down to the Windows-specific list.

   i. Make sure that the necessary extensions are uncommented (no “;” preceding the line). The bare minimum for Sugar Scheduler to run is to have php_curl, your database Connector, typically php_mysql (for PHP5), and php_imap.

   j. Test the batch file again.

Diagnostic Tool

Use this option to capture system configuration for diagnostics and analysis. The diagnostic tool pulls up system information and stores it in a zip file on the server for download. This file summarizes the basic information required to resolve the problem. Attach this file to the help request you sent to Customer Support.

To capture system configuration

1. On the **Diagnostic Tool** page, click **Execute Diagnostic** to run the tool.

   The system displays a list of system configuration files. By default, the system captures configuration information for all the selected files.

   The system performs the following actions of these files:

   SugarCRM Config.php - Copies the *config.php* file from the root directory after replacing the DB password with an asterisk for security purposes.

   SugarCRM Custom directory - Copies the custom directory to a zip file to enable Customer Support to know what has been customized through the Layout Editor.

   phpinfo() - Executes `phpinfo` and stores it in a file.

MySQL - Configuration Table Dumps - copies a few tables from the database and replaces sensitive information with an asterisk for security purposes.

MySQL - All Tables Schema - writes the schema for all tables to an HTML file.

MySQL - General Information - Pulls up some general information, like MySQL version, character sets, etc.

MD5 info - Runs md5 checks on all files in the sugar directory and compares it against a stock Sugar installation's md5s. This enables Customer Support to learn which, if any, files have been manually customized.

BeanList/BeanFiles files exist - If a custom module has been loaded, and the author did not define these references correctly, it can cause problems. This action checks all the references to ensure they are correct.

SugarCRM Log file - copies the log file.

Sugar schema output (VARDEFS) - copies the Sugar database schema.

2. Deselect the ones you do not want to view, and then click **Execute Diagnostic**.

   The system creates a zip file that contains the captured configuration information.

3. To view the file, click the **Download the Diagnostic file** link at the bottom of the page; to delete the file, click the **Delete the Diagnostic file** link.

4. If you choose to download the file, the **File Download** dialog box displays on the page. To view its contents, click **Open**, and click the file you want to view. To save the zip file contents, click **Save**, and select a location on your local machine.

Themes

Use this option to manage Sugar themes for your organization. You can enable or disable a theme. Sugar displays only enabled themes in the **Theme** drop-down list from which users make their selection. By default, all themes are available to users.

To set system default theme

System default theme can be set by the administrator. This can later be changed by the individual user.

To set the system default theme follow the steps listed below:

1. Click the **Admin** link on the top right corner of your page to go to the **Administration** page.
2. Click **Themes** link in the **System** section of the **Administration** page.
3. Select the default theme from the **Default Theme** drop-down list.
4. Click Save.

To manage themes

1. Navigate to the System section of the Administration Home page, and click **Themes Settings**.

   This displays the Themes Settings page.

2. To disable a theme, click the Right arrow to move it from the Enabled list to the **Disabled** list; to enable a theme, click the Left arrow to move it from the **Disabled** list to the **Enabled** list.
3. Click **Save**.

Tracker

Use this option to enable the system to track user actions and other information for Sugar modules, including custom modules.

Sugar uses this information to create tracker reports. For information on tracker reports, see Viewing and Creating Tracker Reports.

By default, all tracker settings are disabled.

To configure tracker settings

1. Select the appropriate box to enable one or more of the following options:

   Tracker actions. Enable this option to track user actions such as modules accessed on a particular day and the actions performed in those modules such as viewing or editing records. Sugar records tracker actions in the database. You can run a trackers report to view this data.

   Tracker sessions. Enable this option to track a user's session data such as session round trips, start and end dates.

   Tracker performance. Enable this option to track performance-related information such as database access, file access, server response time, and memory usage.

   Tracker queries. Enable this option to track SQL queries that exceed the `slow_query_ time_msec` limit set in the **config.php** file. If the **Log Slow Queries** option is enabled on the System Settings page, then any query exceeding the number of milliseconds defined in this setting will be logged in the database. The queries tracked will substitute the runtime SQL values with the '?' character so that the SQL pattern is treated as a single slow query entry.

   Log Slow queries. Enable this option to log slow queries. This information is for performance-tuning investigation. If you have also enabled the **Tracker Queries** option, you can run the pre-defined Slow Queries report to view slow queries.

   Number of days of Tracker data to store when Scheduler prunes the tables. Enter the number of days of data to be retained after the **Prune Tracker Tables** scheduler is run.

   Slow query time threshold. Specify the threshold, in milliseconds, that defines slow queries. Queries that take longer than the threshold time are logged in the **sugarcrm.log** file. This information is for performance-tuning investigation. If you have also enabled the Tracker Queries option, you can run the pre-defined Slow Queries report to view slow queries.

2. Click **Save** to save the settings.

Note: In order to obtain data on memory usage, your PHP system must support the `memory_get_usage` function.

Activity Streams

Sugar Feed has been renamed My Activity Stream in Sugar Release 6.2.0. Select this option to enable the My Activity Stream functionality for your organization. My Activity Stream enables users to be informed as soon as a team member creates a new contact, lead, opportunity, or case. Team members are also notified of status updates when a lead is converted, when a case is closed, and when an opportunity is closed. When a user performs any of these actions, Sugar displays a message in the My Activity Stream dashlet on the Home page of team members.

You can activate My Activity Stream for one or more of the following modules: Leads, Cases, Opportunities, and Contacts.

Additionally, you can enable the My Activity Stream to allow users to post status updates, external links, images, and YouTube videos. Your organization can also create custom link types. These posts can be viewed only by members of the specified team.

To enable and manage My Activity Stream

1. In the System sub-panel, click **My Activity Stream Settings**.

   The My Activity Stream Settings page displays on the screen. Specify the following settings.

   Enable My Activity Stream. Select this option to enable this functionality for users in your organization.

   Activate My Activity Stream For: To activate My Activity Stream for a module, select the checkbox appropriate for the module.

   Activate My Activity Stream. Select this option to enable users to post status updates, images, links, and YouTube videos.

2. Click **Save** to save the settings. To delete all existing entries in the Activity Stream, click **Delete My Activity Stream Entries** and click **OK** to confirm your action.

   My Activity Stream entries for images, links, and YouTube videos are automatically deleted after two weeks. If you add custom link types, you can clear them from the cache using the **Repair - Quick Repair** and **Rebuild** option.

Connectors

Use this option to manage Sugar Cloud Connectors to external data sources. Sugar provides Connectors to Hoover's, Zoominfo©-Person, Zoominfo©-Company, Twitter, IBM LotusLive, Google Docs, Citrix GoToMeetings, Cisco WebEx meetings, InsideView, and LinkedIn.

Connectors are designed for company-type or person-type modules such as Accounts, Leads, and Contacts and for activity-type modules such as Meetings and Documents.

You can enable all Connectors except InsideView for any module, standard or custom, that is listed in Studio provided the module has a standard Detail View layout. For example, though the Knowledge Base module is listed in Studio, you cannot enable Connectors for it because it does not have a standard Detail View layout.

Note: You can enable InsideView for Accounts, Opportunities, Leads and Contacts only.

For all Connectors except InsideView, you can also map Connector fields to fields in Sugar as described later in this section. InsideView displays as a separate panel within the Detail View pages of Accounts, Opportunities, Leads and Contacts records.

Connectors are enabled by default to allow users to search external data sources for new information from within a Sugar record in the module. Users can view the external data or merge it with the existing information in the Sugar record. For example, they can update addresses and phone numbers for an account. For information on merging data, see Integrating data from external sources. You can disable Connectors, if needed.

You can specify the Connector fields to use when searching a data source, as described in Setting Connector Search Fields.

Developers in your organization can create Connectors to other data sources, and you can upload them into Sugar using the Module Loader. You can also search for other available Connectors on Sugar Forge at http://www.sugarforge.org and Sugar Exchange at http://www.sugarexchange.com.

To configure Connector properties

You do not need to configure the Connector properties for InsideView. For all other Connectors, follow the steps listed below:

1. Navigate to the **System** section of the **Administration** Home page, and click **Connectors**.

   This displays the **Connector Settings** page.

2. Click **Set Connector Properties**.

   The **Set Connector Properties** page displays tabs for the Connectors in Sugar. Tabs for any other Connectors that you install also display on this page.

   If you have obtained API keys for Hoover’s and Zoominfo, enter them on this page to activate these connectors. If you have not obtained them, it is recommended that you do so. If you do not enter the API keys for these Connectors, Sugar uses a default key, which does not display on the screen.

   For LinkedIn, Google Docs, Citrix GoToMeetings, and Cisco WebEx, no API key is required. Users need individual accounts with each application to be able to access the application in Sugar.

   You need to obtain API key and App Secret from Facebook; Consumer Key and Consumer Secret from Twitter, and OAuth Consumer Key and OAuth Consumer Secret for IBM LotusLive.

Hoover's requires a WSDL URL. This is the location of the Web Service Definition Language (WSDL) needed to create the client objects that enable Sugar to communicate with the data source's web services.

Hoover's Connector tab displays the following fields:

- **Endpoint URL**. This is the location that services your SOAP calls. The Endpoint URL for Hoover's is http://hapi.hoovers.com/axis2/Hapi.wsdl.
- **WSDL URL**. The WSDL URL for Hoover's is:

  http://hapi.hoovers.com/axis2/Hapi.wsdl.
- **API key**. This field displays the introductory API key for Hoover's. You will need to replace this with the API key that you obtain from Hoover's.

Zoominfo-Person Connector tab displays the following fields:

- **Person Search Query URL**: This is the location that services your SOAP calls while searching for individuals by name or email address.The URL for Zoominfo-Person is:

  http://api.zoominfo.com/PartnerAPI/
  XmlOutput.aspx?query_type=people_search_query&pc=

Person Detail Query URL: This is the location that services your SOAP calls while searching for details about a person such as the job title, company name, company phone number, company address, and a brief biography. The URL for Zoominfo-Person is:

http://partners.zoominfo.com/PartnerAPI/
XmlOutput.aspx?query_type=person_detail&pc=

- **Partner Code:** Enter the Partner code that you obtained from Zoominfo.
- **API Key**. This field displays the introductory API key for Zoominfo-Person. You will need to replace this with the API key that you obtain from Zoominfo.

The Zoominfo-Company Connector tab displays the following fields:

- **Company Search URL**. This is the location that services your SOAP calls while querying for company names. The URL is:

  http://api.zoominfo.com/PartnerAPI/
  XmlOutput.aspx?query_type=company_search_query&pc=
- **Company Detail URL**.This is the location that.services your SOAP calls while searching for company-specific information. The URL is:

  http://api.zoominfo.com/PartnerAPI/
  XmlOutput.aspx?query_type=company_detail&pc=
- **Partner Code**: Enter the partner code that you obtained from Zoominfo.
- **API Key**. This field displays the introductory API key for Zoominfo-Person. You will need to replace this with the API key that you obtain from Zoominfo.

3. If a Connector's URL has changed, enter the new URL in the appropriate field.
4. To ensure that data source is correctly configured, click **Test Connector**.

   If the configuration is correct, Sugar displays a message stating that the test was successful.
5. Click **Save** to add the settings; to exit the page without saving the changes, click **Cancel**.

To enable or disable modules for Connectors

1. Click **Enable Connectors** on the **Connector Settings** page.
2. Drag and drop module names from the **Disabled** to the **Enabled** column to enable Connectors like LinkedIn, Hoovers, ZoomInfo, Twitter, and InsideView, for the desired modules.

   To disable modules for Connectors like LinkedIn, Hoovers, ZoomInfo, Twitter, and InsideView, drag the modules from the **Enabled** list to the **Disabled** list.

   For Facebook and LotusLive, mark the following checkbox:

   Enable users to create external account records to this connector. In order to use this connector, the properties should also be set in the Set Connector Properties settings page.

   For Google, GoToMeeting, and WebEx, mark the following checkbox:

   Enable users to create external account records to this connector.
3. Click **Save**.

Setting Connector Search Fields

You can choose the fields by which users can search a data source. However, your choices are limited by the Search parameters that the data source supports. The table below lists the supported and default Search fields for Hoover's and Zoominfo.

Data Source	Supported Search Fields	Default Search Fields
Hoover's	Company Name, State, City, Country, Postal Code	Company Name
Zoominfo-Person	First Name, Last Name, Company Name, Email Address, Current Job Company Name, College/ University. **Note**: The Company Name field serves as an additional filter for the convenience of filtering the results based on company name. But the Company Name field will not work by itself. The First Name, Last Name, and/or Email Address search values should be provided in conjunction with the Company Name.	First Name, Last Name, Email Address, Current Job Company Name
Zoominfo-Company	Company Name, Country, Postal Code, State	Company Name, State, Company.

Note: The search results you see depend on the Search rules set by the data source provider.

To select Connector search fields

1. On **Connector Settings** page, click **Manage Connector Search**.

Each Connector tab displays separate lists of Connector fields for each Connector-enabled module.

2. To use a field in **Connector Search** for a module, drag it from the **Available** list to the **Default** list.
3. Click **Save**.

   Users can view the selected fields in the module's **Search** sub-panel on the **Data Merge** page.

Mapping Connector Fields

You can map Connector fields to fields in a Sugar module to determine how the data is merged from the data source into the Sugar record. For the Connectors that Sugar provides, field mappings are set by default. You can change these mappings and also map additional fields.

For each data source, you can map a module field to one Connector field. The Connector fields that appear in the Data List View are determined by which Connector fields are mapped. However, some of the Connector fields display data in the Data Merge form but not in the List View. Other Connectors may or may not display data in the List View or Merge Form.

The table below lists the fields that display in the Data List View, Additional Details Pop-up window, and the Data Merge Form.

Data Source	Data List View Fields	Additional Details Pop-up/Data Merge Form Fields
Hoover's	City, Country, Company ID, Annual Sales, Company Name	Company Name, City, State, Country, Phone Office, Annual Sales, Street Address 1, Street Address 2, Postal Code, Total Employees
Zoominfo-Person	First Name, Last Name, Current Job Company Name, Job Title, College/ University	First Name, Last Name, Current Job Company Name, Current Job Start Date, Current Job Industry, Current Job Title, Current Job Street Address, Current Job City Address, Current Job State Address, Current Job Zip Address, Current Job Country Code, Biography, Collection/University, Image URL, Zoominfo Person URL, Email Address, Direct Phone, Fax, Affiliation Job Title, Affiliation Company Name, Affiliation Company Phone, Affiliation Company Website
Zoominfo-Company	Company Name, City, State, Website, Revenue, Employees	Company Name, City, State, Website, Postal Code, Country, Industry, Phone, Website, Description, Company Ticker, Company Profile URL, Annual Revenue, Employees

To map Connector fields

1. On the **Connector Settings** page, click **Map Connector Fields**.

Each Connector tab displays a list of fields in the Connector and a corresponding drop-down list of fields in Connector-enabled Sugar modules.

2. To change a default mapping or to add a new mapping, select the Sugar field from the drop-down list corresponding to the field in the Connector.
3. Click **Save** to save the mappings.

   Sugar uses these field mappings when merging data.

Note: Developers in your organization can customize the Sugar code to change the order in which connectors are prioritized when using the Smart Copy feature during data merge. Currently, your developers can manually edit the *display_config.php* file located in *custom/modules/Connectors/metadata*. In this file, the Connectors are grouped by the modules for which they have been enabled. The Connectors for each module are listed in the order that they will appear on the Data Merge screen.

If a data source Connector supports pop-up windows to display data, then Sugar also uses these field mappings to determine which fields display the pop-up window for the data source. For example, the mapped field for LinkedIn displays the LinkedIn icon. When users point the cursor at this icon, a pop-up window displays the LinkedIn data for the field.

PDF

Use this section to configure settings for PDF files of reports and quotes. These settings display in the Document Properties window of the PDF file when you select Properties from the File menu. Administrators can specify other settings such as the logo, keywords for search, and document title.

By default, the page orientation for report PDFs and project PDFs is set to Landscape. The page orientation for quote PDFs is set to Portrait. Developers in your organization can change these configurations, if needed. Users can configure the default font type and size for PDFs from the User Preferences page.

You can add additional fonts for PDF files. To do this, you will need to create a package containing the required fonts and load it into Sugar using the Module Loader.

To configure PDF settings

1. In the **Document Properties** section, you can configure the following settings:

   Title. Enter the title of the document.

   Subject. Enter the subject of the document.

   Author. The name of the user who created the PDF file.

   Keyword(s). The keywords associated with the document to help users find the document when they perform a keyword search.
2. In the **Images** section, you can configure the following settings:

   Select New Image for Quotes. The default image that displays on this page is the logo that you specify in System Settings. Click **Browse** to select a different header logo for quotes.

Select New Image for Reports. The default image that displays on this page is the logo that you specify in System Settings. Click **Browse** to select a different header logo for reports.

Note: You must install the PHP GD library to successfully upload images in PNG format.

3. Click **Save** to save your settings; click **Restore** to revert to default settings; click **Cancel** to exit the page without saving your settings.

Generating Fonts for Quote PDFs

To enable users to create PDF versions of quotes and email them to customers directly from the Quotes detail view, you must ensure that the correct fonts are installed and specify the appropriate character set from the Import/Export Character Set drop-down list in the User Preferences page. On Microsoft Windows, if you are using USD or Western European fonts, you can select ISO-8859-1 (Western European and US) or CP 1252. The default character set in Sugar is UTF-8.

For other languages such as Japanese, you will have to create the appropriate font.

To generate a font for PDF files

1. Use a program such as Font Forge to generate PS Type1/Binary font of*.afm* (Adobe Font Metrics) type.
2. Copy the file into *sugarcrm/include/fonts*.
3. Navigate to the layout directories located in *sugarcrm/modules/Quotes/layouts/* or *sugarcrm/custom/modules/Quotes/layouts/*.
4. In any layout file such as Invoice, Standard, and Custom Layout, find the parameter `$font=include/fonts/`***`FontName`*** where ***`FontName`*** is the name of the font that you generated.
5. Save the file.
6. On the User Preferences page, select the appropriate character set for the chosen language.
7. Generate a quote PDF to ensure that the settings are correct.

Mobile

Use this section to enable or disable Sugar modules for Sugar Mobile and Sugar Mobile for iPhone.

Sugar Mobile enables users to access Sugar modules, including custom modules within a web browser on a smartphone or PDA. *Sugar Mobile for iPhone* is a native mobile application that enables users to access Sugar from their iPhone.

You can add, edit, and remove fields, including Calculated Value fields, to customize the mobile view layout from Studio. For information on creating and editing fields, see Creating and Editing Fields. For information on changing page layouts, Editing Layouts for Sugar Modules.

Note: Calculated Value fields will not be updated in real time in mobile Edit View.

You can make the following configuration changes for Sugar Mobile for iPhone:

- You can hide any module that is visible by default.
- You can display modules that are not on the default list, including custom modules.
- You can specify the maximum number of primary records and related records to display on the iPhone screen.
- In the Edit View layout, you can add and remove fields, including Calculated Value fields.
- You can move fields within List View, Edit View, and Search layouts.

For these changes to take effect, you must log out of Sugar Mobile for iPhone and log in again.

To manage mobile settings

1. Select **Mobile Settings** from the **System** section.

   On the **Mobile Settings** page, modules that are enabled by default are listed in the Enabled column. Modules that are not enabled are listed in the **Disabled** column.
2. In the **Listview items per page (Mobile)** field, you can change the number of records that display per page in List View on a mobile device. The default is 10 records per page.
3. In the **Subpanel items per page (Mobile)** field, you can change the number of related records that display in a sub-panel in Detail View. The default is three records per page.
4. To enable a module for Sugar Mobile, drag it from the **Disabled** column to the **Enabled** column.
5. To disable a module for Sugar Mobile, drag it from the **Enabled** column to the **Disabled** column.
6. Click **Save**.

Global Search

Administrators can select the modules that users can search on when using Global Search. This includes both standard and custom modules that have been deployed in Sugar.

To Enable/Disable modules for Global Search

To enable/disable modules for Global Search, follow the steps listed below:

1. Click the **Admin** link on the top right corner of your page to go to the **Administration** page.
2. Click **Global Search** in the **System** section.

   This opens the **Global Search** page.

3. Drag and drop modules between **Enabled Modules** and **Disabled Modules** to select which modules users can search on when using **Global Search**.
4. Click Save.

Languages

Administrators are able to manage languages that are available to users.

To display/hide available languages

Follow the steps listed below to display/hide available languages:

1. Click the Admin link on the top right corner of your page to go to the Administration page.
2. Click Languages link in the System section of the Administration page.
3. Drag and drop items from the Enabled Languages box to the Disabled Languages to select languages that are available for your users.
4. Click Save.

To verify that your language selection has been deployed, logout of Sugar and view the available languages from the **Language** drop-down list in the Sugar login page.

Email

Administrators can setup and manage mail accounts for inbound and outbound emails, including campaign emails, using the following options:

- **Email Settings**
- **Inbound Email**
- **Campaign Email Settings**
- **Email Queue**

Email Settings

Use this option to configure a mail server for outbound emails, enable email notifications to users when records are assigned to them, and specify which HTML tags, such as applets and frames tags, to strip from incoming emails before displaying them in Sugar.

To configure email settings

1. In the **Email** section of the Administration page, click **Email Settings**.
2. In the **Outgoing Mail Configuration** sub-panel, enter information for the fields listed below.

   To add Google's Gmail server, click **Prefill Gmail Defaults**. The system fills in the **SMTP Server** and **SMTP Port** fields with the Gmail server's address and port number respectively.

From Name. Enter the sender's name; for example, the name of your organization.

From Address. Enter the sender's email address.

3. Select your email provider, such as Gmail, Yahoo, or Exchange. If you are not using any of these, click **Other**.
4. Enter the email address and password for the specified provider.
5. **Allow users to use this account for outgoing email**. Select this option to allow all users to use the account, for which username and password were provided, to send emails using the outgoing mail server used to send system notifications and alerts. If you do not select this option, users will have to provide their own account information when using the outgoing mail server.
6. Click **Send Test Email** to check if the settings are valid. If they are not, Sugar displays an error message.
7. In the Email Options section, you can specify the following settings:

   Assignment Notifications. Enable this option to send email notifications to users automatically when records are assigned to them.

   Send Notifications from assigning user's email address. Select this option to send notifications from the email address of the user who is assigning a record to another user.

   Delete related notes and attachments with deleted emails. When you select this option, related notes and attachments are deleted when an email is deleted.
8. In the **Email Security Settings** section, you can specify the following information:

   Select Outlook Default Minimum Security Precautions. Select this option if you do not want to strip the **Style** tag, which is used by Outlook.

   Toggle all options. Check this box to strip all the listed tags from emails in the Email client. To strip some of the listed tags, uncheck this box and then select individual tags to strip.
9. Click **Save** to save the settings**;** click **Cancel** to exit the page without saving your changes.

Inbound Email

Use this option to create and manage group mail accounts, and bounce handling accounts.

Group Mail Accounts: Allow multiple users, such as team members, to view and import emails from an external mail account. When you receive emails that are addressed to your organization but not to any particular user, you can route it to a Group mail account such as *support@example.com* or *sales@example.com*. Users can subsequently distribute emails in the Group mail account to other team members.

Bounce Handling Accounts. A bounce handling account stores campaign emails that bounce back to you due to incorrect email addresses. You can create a bounce handling inbox separately for each campaign, or you can create one that is common to all campaigns. The system tags every bounced campaign email with a unique identifier that enables you to identify the campaign.

Creating Cases from Emails. When you create a group mail account, you can set it up to automatically generate cases from inbound emails. When the case is created, it is assigned to a team and an email notification is sent out. The email's subject line is copied to the case's subject line and the body is copied as the case description. The email is related to the case and is listed in the History sub-panel of the case's Detail View.

Optionally, you can use the auto-reply template to automatically notify customers that you received their email. You can also to set up the template to notify them that a case has been created to resolve the issue. The Subject line of the email contains the number of the newly created case. The case number format follows the Case Macro setting that displays on the Inbound Email Home page. Sugar imports an email and associates it with a case based on the Subject line. When users send an email from the detail page of a case, the case number appears in the Subject field of the email.

The Case Macro field displays the default case macro string. To customize it, you can change CASE to a different word, but you must preserve the rest of the string.

To set up a Group mail account

1. From the **Actions** drop-down list on the Inbound Email tab, click **New Group Mail Account**.

   Sugar displays the Group Mail Account page on the screen.

   In the **Mail Account Information** section, enter information for the following fields:

   Name. Enter the user's name, or an alternate name for the mail account.

   Mail Server Address. Enter the address of the external mail server.

   Mail Server Protocol. Select IMAP from this drop-down list. Additional fields display on the screen to select the folder you want to monitor, a Trash folder to store deleted emails, and a Sent folder to store copies of outgoing emails.

   Monitored Folders. This field displays when you select IMAP as the protocol. By default, the system monitors the Inbox. To monitor other folders, click **Select** to view a list of available folders in the external mail account. To select multiple folders, hold down the Shift key or the Ctrl key. After you select the folders that you want to view in Sugar, click **OK** to view them in your inbox.

   Trash Folder. To select a Trash folder from the Folders list, click **Select.** After you specify the trash folder, click **OK**.

   Sent Folder. To add a folder to view your outbound emails, click **Select.** After you specify a folder, click **OK**.

   Status. From the drop-down list, select **Active** to activate the Group mail account or **Inactive** to deactivate it. Users cannot view emails from a deactivated account.

   User Name. Enter the username to access the mail server.

   Password. Enter the user's password to access the mail server.

Mail Server Port. Enter the server port number.

Use SSL. If your mail server supports secure socket connections, selecting this box will force SSL connections when importing emails into Sugar.

2. In the **Email Handling Options** section, enter information for the following fields:

   Assign to Teams. Select the team from this drop-down list to permit access to the Group mail account.

   From Name. Enter the name of the person or company that will send the emails.

   From Address. Enter the email address from which emails will be sent.

   Reply-to Name. Enter the name to which you want replies to be addressed.

   Reply-to Address. Enter the email address associated with the Reply-to name.

   Allow User to Send Emails Using "From" Name and Address. Select this option if you want to enable users to use this account's **From** name and address as their **Reply To** address.

   Import Emails Automatically. Select this option to create email records automatically in Sugar for all incoming emails.

   Create Case from Email. Select this option to create cases automatically from inbound emails. When you select this option, you will need to specify how the emails are distributed in the **Distribution Method** field.

   > **Distribution Method**. This field displays only when you select the **Create Case** option and allows you to select **Round-Robin** or **Least-Busy**. With the Round-Robin option, the system distributes cases evenly among all users within the specified team. With the Least-Busy option, the system distributes cases to the least busy user within the team assigned to the Group folder.
   >
   > **New Case Auto-Reply Template**. This field displays only when you select the Create Case option. You can use a **Case Reply** template to set up an automated response notifying email senders that a case has been created to resolve their issue. You can select an existing template from the drop-down list, or click **Create** to create a new template. The response contains the system-generated case number in the subject line of the email. The body of the email for which the case was created displays below the template text.
   >
   > For information on creating email templates, see Creating Email Templates.
   >
   > **Leave Messages on Server**. This option, which applies to imported emails, displays only when you select a Group folder. Select **Yes** if you do not want to delete the emails from the external server when you import them into Sugar. Select **No** if you want to delete emails from the external server.

   Auto-Reply Template. Use this template to set up an automated response notifying email senders that you received their email. From the drop-down list, select an existing template, or click **Create** to create a new one. If both templates are selected, Sugar will respond to the sender with the **Create Case Reply** template instead of the **Auto-Reply** template.

   No Auto-reply to Domain. To exclude a domain from receiving the automatic email response, enter the domain name. It is common to specify your organization's domain to prevent auto-replies from being sent to your organization's members.

Number of Auto-responses. Set the maximum number of auto-responses to be sent to a unique email address during a period of 24 hours.

3. Optionally, click **Test Settings** to ensure that the settings are accurate.
4. Click **Save** to save the settings.

   The system creates the mail account and displays its detail page.

To set up a bounce handing mail account

1. Select **New Bounce Handling Account** from the **Inbound Emails** tab drop-down list.
2. Enter the required information as described in To set up a Group mail account.
3. Optionally, click **Test Settings** to ensure that the settings are accurate.
4. Click **Save** to save the settings.

   The system creates the bounce handling account and displays its detail page.

To manage group mail accounts and bounce handling accounts

- To view the details of an account, click its name in the **Inbound Email** home page.
- To activate and deactivate multiple accounts, or change team assignments, select them in the List View and use the Mass Update panel to make the changes.
- To edit an account, click **Edit** in the Detail View, revise the information, and click **Save**.
- To duplicate an account, click **Duplicate** in the Detail View. The system creates a new mail account and displays the Edit View. Edit the details as needed and click **Save**.
- To delete a mail account, select it from the List View and click **Delete.** Alternatively, click **Delete** from the Detail View. To delete multiple group mail accounts, select them in the List View and click **Delete**.

Campaign Email Settings

You can specify settings for email campaigns from the Campaigns module. From the Administration Home page, you can change some default values, namely, the number of emails sent per batch and the location of the campaign tracking files. You can also specify whether you want to keep copies of campaign messages or not.

To configure campaigns email setup from Campaigns module

1. On the Campaigns tab **Actions**drop-down list, select **Set up Email**.

   The **Email Setup** section displays the default values for the following. You can enter new values, if needed:

   From Name. Sugar display the name entered on the Email Settings page.

Mail Transfer Agent. Select the mail transfer protocol from the drop-down list. **SMTP** is the default protocol.

From Address. The email address for the sender.

Note: The name, address, and mail transfer agent information that display on this page reflect the default values set on the Email Settings page. Hence, any change that you make to these values reflect on the Email Settings page and not the Campaign Email Settings page that you access from the Administration Home page.

SMTP Server. Enter the name of the SMTP server.

SMTP Port. The system displays the SMTP port number.

Use SMTP Authentication. To use SMTP authentication, check this box and enter the email account username and password in the fields that display below.

Enable SMTP over SSL or TLS: Select either SSL or TLS from the drop-down list.

In the **Mass Mailing Options** section, enter the information shown below. You can also enter this information using the **Campaign Email Settings** option on the Administration Home page.

Number of emails sent per batch. Enter the maximum number of emails to send per batch.

Location of campaign tracking files. Campaign tracking files log responses from campaign targets. If you are running Sugar on an external network, select **Default** to accept the default location. However, if your Sugar instance is behind a firewall, then choose **User Defined** and specify the path to your external web server in the field below. Ensure that you create a file named *index.php* to handle requests for three different types of entry points: campaign_trackerv2, removeme, and image, and place the index.php file in the path to your external web server. This *index.php* file must point to the *index.php* file located in the root directory of your Sugar instance.

Keep copies of campaign messages. The Default is **No**. Selecting **No** will store only the template of the campaign message and the required variables to recreate the message.

Selecting **Yes** will save a copy of all email messages sent during all campaigns in the Sugar database. This takes up space in the Sugar database and slows down performance. Hence, it is strongly recommended that you use the default setting.

2. Click **Next**.

   The page displays existing bounce handling mail accounts.

3. To create a bounce handling mail account, click **Create New Mail Account**.

4. Enter the mail account information as described in To set up a Group mail account and click **Next**.

   The system displays a summary page that lists the specified settings.

5. Click **Save** to save the settings and create a bounce handling inbox; to navigate back to the previous screen, click **Back**; to go back to the **Campaigns Home** page without saving any of the specified information, click **Cancel**.

To configure campaign email setup from the Administration page

1. Navigate to the **Emails** section on the Administration Home page, and select **Campaign Email Settings**.

   Sugar displays the **Campaign Email Settings** configuration page on the screen.

2. Specify mass mailing options as described in To configure campaigns email setup from Campaigns module

3. Click **Save**.

   The updated settings display on the page as well as on the **Email Setup** page of the Campaigns module

Email Queue

Use this option to view, send, and delete mass campaign emails that are in the queue for dispatch. The system sends out the email only after the start date/time has passed. After a campaign email has been processed, you can view its status in the Campaign module. The system tracks statistics such as the Sent date and number of times an email delivery was attempted.

Use the Scheduler to run nightly mass email campaigns as well as to monitor bounced campaign emails. For more information on scheduling email mailings, see Scheduler.

To manage queued emails

1. To send out campaign emails, select the campaign in the Queue sub-panel below and click **Send Queued Campaign Emails**.

   You can select more than one campaign at a time.

2. To delete campaign emails, select the campaign in the **Queue** sub-panel below and click **Delete**; click **OK** to confirm the deletion.

3. To search for a specific campaign, enter the campaign name, or recipient name, or recipient address in the Search fields above and click **Search**; click **Clear** to clear the search fields.

Developer Tools

The Developer tools section displays the following options that enable you to build new modules and customize existing ones.

- **Studio**
- **Rename Tabs**
- **Module Builder**
- **Display Module Tabs and Subpanels**
- **Module Loader**

- **Configure Shortcut Bar**
- **Configure Grouped Modules**
- **Dropdown Editor**
- **Workflow Management**

The Module Builder enables you to build custom modules and Studio enables you to customize existing modules. To create relationships between modules, see Creating Relationships.

After you build a module in Module Builder, you can deploy the module directly within the current instance, or you can use the Module Loader to install it in another Sugar instance. For more information, see Module Loader.

You can add custom modules as Sugar Dashlets on your Home page. For more information on Sugar Dashlets, see Managing Sugar Dashlets.

Module Builder

Use the Module Builder to create custom modules in Sugar. You can also make custom modules available for mobile views using the Mobile Settings option.

The process of creating a custom module is as follows:

1. Create a package to house the new module. You can create one or more modules within a package.
2. Create a module using one of the following templates that Sugar provides for you.

   Basic. This template provides basic fields such as ID, Date Entered, and Created By. Use this template to create a module from scratch.

   Company. This template provides organization-specific fields such as Company Name, Industry, and Billing Address. Use this template to create a module that is similar to the Accounts module.

   File. This template provides document-specific fields such as File Name and Document Type. Use this template to create a module that is similar to the Documents module.

   Issue. This template provides case and bug-specific fields such as ID, Description, and Created By. Use this template to create a module that is similar to the Cases module or Bug Tracker module.

   Person. This template provides individual-specific fields such as salutation, title, name, address, and phone number. Use this template to create a module that is similar to the Contacts module or the Leads module.

   Sale. This template provides opportunity-specific fields such as Lead-Source and Probability. Use this template to create a module that is similar to the Opportunities module.
3. Create new fields, if necessary. You can also rename default fields from the template.

Note: Apart from field names, you cannot edit other field properties in a template. However, you can duplicate the fields and save them with a different name to customize them. You can choose which fields appear in the module layouts.

4. Customize page layouts for List View, Edit View, Detail View, Sub-panels, Search form, and Sugar Dashlets, if necessary.
5. Create relationships between the new module and other modules, if needed. A Sugar module, typically, has multiple relationships with other Sugar modules. When you create a custom module, you can define its relationship with other Sugar modules.
6. Save the package and distribute it.

   You can choose one of the following options to distribute the package:

   - **Publish**. This option is designed for distribution to specific users or customers. The system creates a zip file, which you can save on your local machine. You can then email it to one or more individuals who can use the Module Loader to upload the zip file into their Sugar instance.

     After the module is installed through Studio, you can add or remove fields and make other changes to a published module.
   - **Deploy**. This option is designed to install the custom module on your Sugar instance and make it available to users in your organization. After deployment, if needed, you can make further changes to the module in Module Builder and deploy it again to update the installed module.

     You can also add or remove fields and make other changes to a deployed module through Studio. However, note that if you change a deployed custom module in Studio and then re-deploy it from Module Builder, the following information will be lost:

     - Custom field labels will be lost and, hence, will not display in the page layouts even though the custom fields and the associated data exist in the database.
     - The layouts for the custom module will be lost and will have to be created again. If you created custom fields in Studio and added them to the layouts prior to re-deployment, you will have to add them again to the layouts in Module Builder.
     - Custom relationships will be lost. The relationship tables and relationships between records that are stored in those tables are deleted from the database.
   - **Export**. This option is designed for distribution to developers. The system creates a zip file, which you can save on your local machine and email to other developers. Using the Module Loader, developers can install it on their Sugar instance and customize it further in Module Builder if necessary. The package is visible only in Module Builder and, hence, only administrators can access it until it has been deployed.

To create a package

1. In the **Developer Tools** sub-panel, click **Module Builder** to view the Module Builder page.

2. Click **New Package**.

   Sugar displays the **Package** page on the screen.

3. Enter a name for the package and click **Save**.

   The system refreshes the page and displays options to duplicate, publish, deploy, export, and delete the package.

4. Enter information for the following fields:

   Author. Enter your name as the creator of the package.

   Key. Enter an alphanumeric key to distinguish modules with similar names. The system will prefix all class names, directories and tables names with this key.

   Description. Enter a brief description of the package.

5. Click **Save** to create the package; to delete the package, click **Delete**.

6. After you save the package, if you want to create a copy, click **Duplicate**.

   The system appends a **1** to the package name and saves it as a new package.

7. To publish the package after saving it, click **Publish**.

8. To deploy the package on your Sugar instance after saving it, click **Deploy**.

9. Click **Export** to save the package as a zip file on your local machine.

To create a module

1. Click the **New Module** icon on the Package page.

   The Module page displays on the screen.

2. Enter information for the following fields:

   Module Name. Enter a name for the module.

   Label. Enter a name for the module that you want displayed in the Sugar User Interface.

   Importing. Selecting this option to allow data import into the module.

   Team Security. By default, this option is enabled to allow you to assign a team to access and manage records created in the module. Deselect the box to disable team security, if necessary.

   Navigation Tab. By default, this option is enabled to create a tab for the module that is identical to other Sugar module tabs.

   Type. Click a template to select it for your module

3. Click **Save** to save the module and add it to the package.

   The system refreshes the page to display the selected template. The new module is nested within the package listed in the **Packages** panel on the Module Builder home page.

   The Packages panel on the left lists all the modules you create within a package. Default fields, labels, layouts, sub-panels, and relationships from the selected template are nested under the module. You can click them to view their details. You can also edit the default layouts, add new fields, and create relationships with other Sugar modules.

For information on customizing a layout or the Search form, see Editing Layouts for Sugar Modules. For information on creating new fields, see To add fields. For information on defining relationships, see Creating Relationships.

To edit Sugar Dashlets

1. On the custom module page, click **View Layouts**. Alternatively, click **Layouts** in the **Packages** panel on the left.
2. Click **Sugar Dashlet**.

   You can edit the List View and the Search form for Sugar Dashlets.
3. To edit the List View, click **Sugar Dashlet List View** and follow the procedure described in To edit List View.

   To edit the Search form, click **Sugar Dashlet Search** and follow the procedure described in To edit the Search form.

To auto-refresh data in Sugar dashlets

Administrators can specify system-wide auto-refresh interval of data in the dashlets for their users. To modify the auto-refresh interval settings of Sugar system-wide, follow the steps listed below:

1. Click the **Admin** link on the upper right hand corner of your Sugar page to go to the **Administration** page.
2. Click **System Settings** in the **System** section of your **Administration** page. This opens the **Systems Setting** page.
3. Select required value from the **Minimum Dashlet Auto-Refresh Interval** drop-down list and click **Save**.

When you select a value from the drop-down list, users will be able to see and set values more than your selected value in their drop-down lists. For example if you select **Every 3 minutes**, values displayed in user's drop-down lists are **Every 3 minutes**, Every 5 **minutes**, and **Every 10 minutes**. Users can customize their auto refresh intervals within this range only.

To distribute or install a package

1. In Module Builder, select the package and click **Publish**, **Deploy**, or **Export**.

   When you select **Publish** or **Export**, the system saves it as a zip file that you can export to your local machine and distribute as needed. When you select **Deploy**, the system installs all the custom modules in the package on your Sugar instance.
2. When you choose **Publish** or **Export**, select **Save to Disk** and click **OK**.

   Use the Module Loader to upload the file from your machine into Sugar and install the module. For more information, see Module Loader.

Deleting Packages

You can delete a package if necessary. When you delete a package, all the files that it contains are also deleted. If you delete a package after it has been deployed, you can uninstall the deployed package using the Module Loader. When you uninstall a package, you have the option of retaining or removing the database tables.

You do not need to delete a package before you install a newer version. The files from the new version will override any existing files from the earlier package. That is, any updates that you made to the package before re-deploying will override files from the earlier package.

Module Loader

Use the Module Loader to install Sugar modules, custom modules, upgrades, language packs, Sugar Dashlets, and themes.

You can create custom modules in the Module Builder. A custom module is contained within a package. When you deploy the package, it becomes available to other users in your organization. When you publish or export the package, you can save it as a zip file on your local machine and then use the Module Loader to upload them it into Sugar. For more information on creating packages, see Module Builder.

If you delete a package in Module Builder after it is already installed or deployed, you can uninstall the deployed module in the Module Loader. You can also disable installed modules through the Module Loader.

Before you attempt to install custom modules, you must enter its license information as described in License Management.

To install a module

1. In the System sub-panel of the Administration Home page, click **Module Loader**.

   If you deployed the package, it is listed in the top panel and has already been made available to other users in your organization. You can uninstall it or disable it by clicking the appropriate button.
2. Click **Browse** to navigate to the location of the module's zip file on your local machine.
3. Select the file and then click **Open**.

   The path to the zip file displays in the **Module** field.
4. Click **Upload**.

   The uploaded module displays in the bottom panel.
5. Click **Install**.

   The license agreement displays on the screen.
6. Select **Accept** to accept the agreement and then click **Commit** to install the module.

   If the installation is successful, the system displays a message stating that the module installed successfully.
7. To go back to the Module Loader page, click **Back to the Module Loader**.

   The new module's tab is now visible to all users.

To disable and enable a module

1. To disable a module, click the **Disable** button located next to the module's name.

   Sugar displays the License Agreement on the page.
2. Click **Accept** to accept the agreement.
3. Click **Commit**.

   After the module has been disabled, Sugar displays a message stating that the module has been disabled.
4. Click **Back to Module Loader**.

   The Enable button displays next to the module's name.
5. To enable the module, click **Enable**.

To uninstall a module

1. In the Module Loader, click the **Uninstall** button corresponding to the module's name.

   The system displays a message stating that the module is ready to be uninstalled and displays options to remove or retain the database tables that were created for the new module.
2. To remove the tables from the database, select **Remove Tables**; if not, select **Do Not Remove Tables**.
3. Click **Commit** to uninstall the module; click **Cancel** to retain the module.

Studio

Studio enables you to customize modules by adding new fields, editing existing fields, field labels, page layouts, sub-panels, and Quick Create forms. You can also customize mobile views for Sugar modules that can be accessed from a mobile device. After you customize a module, you can export it to your local machine and upload in into another Sugar instance using the Module Loader.

The Studio home page displays a list of existing modules in the left panel. These include the default Sugar modules as well as any custom modules that have been deployed. The associated fields, labels, layouts, and sub-panels for each module are grouped within the module. You can click the Plus sign (+) preceding the module name to view them. The right panel displays the same information in the form of icons. You can click a module in either panel to drill down to its fields, labels, layouts, and sub-panels.

The bottom of the page displays buttons to the (Developer Tools) **Home**, **Studio**, **Module Builder**, and the **Dropdown Editor**.

Editing a Module

You can create and edit custom fields, drop-down lists, and field labels for a module. You can also edit the default fields, layouts, and sub-panels. After you edit a module, the updated version will not be available to other users until you publish it. You can use Studio to make changes to a published module.

Note: If you make changes to fields and layouts of a custom module in Studio, some information will be lost if the module is re-deployed from the Module Builder. For more information, see the description of **Deploy** in Module Builder

To edit a module

1. In Studio, select the module that you want to edit.
2. Select from the following options**:**

   Labels: Select this option to edit field labels. For more information, see Editing Field Labels.

   Fields: Select this option to create custom fields, and to edit default fields and custom fields. For more information, see To add fields. Select this option to edit and create drop-down lists. For more information, see Dropdown Editor.

   Layouts: Select this option to edit the List View, Detail View, Edit View, Search, and Quick Create forms. For the Leads module, you can also edit the Convert Lead form. For more information, see Editing Layouts for Sugar Modules.

   Relationships: Select this option to view existing relationships and create new ones between modules. After you create a relationship, you will need to deploy it to make it available to users. For more information, see Creating Relationships.

   Subpanels: Select this option to edit one or more of the module's sub-panels. For more information, see To edit a sub-panel.

   Mobile Layouts. Select this option to edit layouts in Sugar mobile. You can edit the List View, Detail View, Edit View, and the Search form for mobile views. For more information, see Editing Layouts for Sugar Modules.
3. Click **Save**.

Editing Field Labels

You can edit field labels, button labels, link labels, module titles, and pop-up window messages using the Label editor. You can also change the default field labels for all the language packs that you have installed. Every module list displays the database fields and the labels they map to in the user interface.

Using the Label Editor instead of the Layout Editor to edit multiple labels for a module reduces the time to edit them.

To change field labels

1. Select the module and click **Labels**.

   A list of existing database fields and the labels to which they are mapped displays on the page.
2. If you want to select a different language pack, select the appropriate one from the list of pre-installed language packs in the **Language** drop-down menu.
3. Select the label that you want to edit and enter the new name.
4. Click **Save**.

5. To navigate back to a different module or to Studio, click the appropriate breadcrumb above the **Save** button.

Creating and Editing Fields

You can add custom fields to any module in Sugar. When you add a custom field, the application adds the field to the appropriate database table and stores the generated metadata. You can then add the fields to the desired layout, such as Edit View and Detail View. For custom modules, you can create fields in the Module Builder.

Use Studio to edit fields in a custom module after it has been published.

The Field Editor allows you to edit some properties of custom fields and change the display label and some properties of standard fields such as the field length, row size, and column size. You can also mark a standard field as a required field or an audited field. These properties are described in To add fields.

Note: You cannot change the field name or data type of existing fields. However, you can change the display label.

To add fields

1. To add a new custom field to a module, select the module and click **Fields**.

   The page displays the current default fields that Sugar provides as well as any existing custom fields.

2. Click **Add Fields**.

   The Field Editor displays the field types as shown below:

   The information that you need to specify varies depending on the selected data type.

3. In the **Field Editor**, enter values for the following:

   Data Type. From the drop-down list, select one of the data types listed below.

   - **Text Field**. Creates a text field for fields such as first name and last name.
   - **Address**. Creates fields for street, city, postal, state, and country.
   - **Checkbox**. Creates a checkbox for data fields with a Yes/No action; users can click the checkbox to turn on or turn off the action.
   - **Currency**. Creates a field to enter a currency. The system automatically creates a field of the currency type if the field does not exist.
   - **Date**. Creates a field to enter a date.
   - **DateTime**. Creates a field to enter the date and time. Enter the default values in the field that displays when you select this data type. You can select a date and time, such as **first day of next month, 12:00pm** from the drop-down list below.
   - **Encrypt**. Creates a field for information, such as social security numbers, whose value is stored in an encrypted format in the Sugar database. Sugar uses Blowfish encryption to encrypt passwords. The value is not encrypted in the user interface and is visible to users.

- **DropDown**. Creates a field that you can associate with a drop-down list of values. For more information on drop-down lists, see Dropdown Editor.
- **Decimal**. Creates a field to hold a number with a specified precision past the decimal point. Sugar stores the exact representation of the number in the database. For example, 1.23 is stored as 1.23.
- **Float**. Creates a field to hold a number with a specified precision past the decimal point. Sugar stores a very close approximation of the specified value. For example, 1.23 may be stored as 1.2345670000. Because using the Float data type instead of the Decimal data type enhances performance, it is recommended that you use it if exact precision is not required.
- **HTML**. Creates static HTML-formatted text to display in record views.
- **IFrame**. Creates an IFrame field. For more information, see Embedding Links and IFrames in a Layout.
- **Image**. Creates an image field to upload an image to display in a record. By default, this field is available in Contacts, Users, and Employees.
- **Integer**. Creates a field to specify positive or negative numbers. You can specify a range with the Min and Max Value fields.
- **MultiSelect**. Creates a drop-down list of values. Users can select one or more values from the list.
- **Flex Relate**. Creates a drop-down list from which you can associate a related record. Because you can add only one Flex-Relate field to a module, this option does not display in the Data Type drop-down list if you attempt to add it to a module that already contains a Flex Relate field.
- **Phone**. Creates a field to enter a phone number.
- **Radio**. Creates a radio button.
- **Relate**. Creates a field to associate a record with another record as a one-way relationship. You can add multiple Relate fields to a module. The Users module can be selected for custom Relate fields that can be used to relate records to Users.

Note: Relate fields and custom relationships are independent of each other. Changes made to either one are not reflected in the other.

- **Text area**. Creates a large field for a block of text.
- **URL**. Creates a field that links to a URL.
- **TextField**. Create a field for text.

Depending on the data type that you select, you will need to specify values for some of the fields listed below.

- **Field Name**. Enter a name for the field. The system adds it to the Sugar database. Do not use spaces or special characters.
- **Display Label**. The system uses the field name as the label that will display in the Sugar User Interface. You can enter a new value if needed.

- **System Label**. Sugar auto-populates this field with the label that it uses internally to refer to the field. This is the label that Sugar displays on the module's **Edit Labels** page in **Studio**. You can change this value.
- **Help Text**. Enter descriptive text for the field. Sugar displays this text when the user points the cursor at the field. Regular users cannot view this text.
- **Comment Text**. Enter additional comments, if needed, about the field.
- **Width**. Enter the width in pixels to scale an uploaded image to this width.
- **Height**. Enter the height in pixels to scale an uploaded image to this height.
- **Border**. Check this box if you want a border around the image.
- **Default Value**. Enter a default value for the field, if necessary.
- **HTML.** Sugar displays this text box when you select the HTML data type. Enter the HTML code in this box.
- **Max Size**. Enter the maximum number of characters that users can enter in the field. This is for text data fields.
- **Mass Update**. Sugar displays this option when you select the DropDown data type or the Date data type. Use it to add the field to the module's Mass Update section.
- **Drop Down List**. For DropDown, MultiSelect, and Radio field data types. For information on creating a drop-down list, see To create a drop-down list.
- **Min Value**. Sugar displays this field if you select the Integer data type. Enter a minimum value during data input.
- **Max Value**. Sugar displays this field when you select the Integer data type. Enter a maximum value during data input.
- **Auto Increment Next Value**. You can specify an incremental value for the next number for numerical fields such as bug numbers, case numbers, and quote numbers.

Note: If you are using Oracle database, changes to the auto-increment value will be reflected in the Sugar User Interface only after creating a record in the target module such as Bugs, Cases, and Quotes.

- **Precision**. Sugar displays this field when you select the Decimal data type. Enter a number to specify the number of digits to the right of the decimal point.
- **Calculated Value Field.** Select this option to create a field for calculated values. You can enter the formula in the **Formula** field, or click **Edit Formula** to use the Formula Builder. For more information, see Calculated Value Fields.
- **Required Field**. Select this option to specify that users must enter a value for the field when creating a record.
- **Reportable**. By default, this box is selected to enable you to specify this field when you run reports. Enabling this option also makes the field available to you in workflows.

Note: Only fields marked **Reportable** can be specified in time-based workflows.

- **Audit**. Select this option to display field values when a user clicks **View Change Log** on a record's Detail View.
- **Importable**. From the drop-down list, select one of the following:

  Select **Yes** to enable users to import a value into the field.

  Select **No** to prevent users from importing a value into the field.

  Select **Required** to make it a required field during import.
- **Duplicate Merge**. From the drop-down list, specify one of the following options for the Duplicate Merge functionality that allows users to merge records from a record's Detail View.
  - **Enabled**: The field will appear on the Merge Duplicates page, but will not be available as a filter condition on the Find Duplicates page.
  - **Disabled**: The field will not appear on the Merge Duplicates page, and will not be available as a filter condition on the Find Duplicates page.
  - **In Filter**: The field will appear on the Merge Duplicates page and will also be available in the Find Duplicates page.
  - **Filter Only**: The field will not appear on the Merge Duplicates page, but will be available on the Find Duplicates page.
  - **Default Selected Filter**: The field will be used for a filter condition by default on the Find Duplicates page, and will also appear on the Merge Duplicates page.

4. Click **Save** to create the field.

   The new field is listed in the Custom section. The system appends the field name with '_c' to indicate that it is a custom field. You can now add the field to the desired layout of a module.

To edit fields in Studio

1. Select the module and click fields to navigate to the Edit Fields page.

   The **Edit Fields** page displays custom fields in the **Custom** section and default fields in the Default section.
2. Click the field to view its properties in the **Field Editor**.
3. Edit the properties as needed and click **Save**.

   You can view the updated field in the module's records.

To manage fields

- To duplicate the field, click **Clone**, enter a new name, and click **Save**.
- To delete the field, click **Delete**. You must also remove the field from any layout to which it was added.

Calculated Value Fields. A Calculated Value field is one in which a formula determines the field value, enabling you to calculate data automatically based on user input. For example, you can calculate estimated sales commission based on the opportunity amount. You can use any available field in the module for which you are creating the Calculated Value field.

A formula specifies one or more field values along with operators and functions that are mathematical or logical. When you execute a formula, Sugar performs the calculation to derive the value. When a field is used in a formula, Sugar recalculates the value whenever a user updates it and saves the record. Similarly, if you update a formula, Sugar recalculates the field value based on the updated formula.

You can use a Calculated Value field in formulas for other Calculated Value fields. For example, you can use a Calculated Value field to display a field value across tabs in Detail View and Edit View. You can also use Calculated Value fields in workflows and reports. Any changes you make to the value of the original field, manually or through a workflow, are reflected in the calculated field on the selected tabs of the layout.

For formula examples, see Examples of Calculated Value formulas.

Import, mass update, and data merging are automatically disabled for Calculated Value fields. When a Calculated Value field is deleted, the associated formula is deleted as well.

Sugar provides a formula builder, which includes a list of functions and fields.The functions are described below.

Function	Description	Example
strlen(String s)	Returns the number of characters in the String *s*.	strlen("Hello") = 5
ln(Number n)	Returns the natural log of *n*.	ln (e) = 1
divide(Number numerator, Number denominator)	Returns the numerator divided by the denominator.	divide(8, 2) = 4
negate(Number n)	Returns negated value of *n*.	negate(4) = -4
number(String s)	Returns the numeric value of *s*	number(“1.200”) = 1200
median(Number n, ...)	Returns the median of the supplied numbers	median(4, 5, 5, 6, 7) = 5
pow(Number n, Number p)	Returns *n* to the p power	pow(2, 3) = 8
add(Number n, ...)	Returns the sum of the given numbers.	add(2, 1, 3) = 6
subtract(Number a, Number b)	Returns a minus b.	subtract(9, 2, 3) = 4
Log(number, base)	Returns the supplied baseLog of number.	log(100, 10) = 2
floor(Number n)	Returns n rounded down to the next integer.	floor(5.73) = 5
multiply(Number n, ...)	Multiplies the supplied numbers and returns the result.	multiply(-4, 2, 3) = -24
max(Number num, ...)	Returns highest value number passed in	max(-4, 2, 3) = 3
min(Number num, ...)	Returns lowest value number passed in	min(-4, 2, 3) = -4
abs(Number num)	Returns the absolute value of num.	abs(-5) = 5

Function	Description	Example
ceil(Number n)	Returns n rounded up to the next integer.	ceil(5.12) = 6
average(Number n, ...)	Returns the average of the given numbers	average(2, 5, 11) = 6
contains(String haystack, String needle)	Returns true if needle is within haystack.	contains("Hello World", "hello") = true
equal(Generic item1, Generic item2)	Returns true if "item1" is equal to "item2".	equal("one", "one") = true, equal(1, "one") = false
greaterThan(Number num1, Number num2)	Returns true num1 is greater than num2.	greaterThan(3, 5) = false
isValidEmail(String email)	Returns true if email is in a valid email address format.	isValidEmail("invalid@zxcv") = false isValidEmail("good@test.com") = true
and(boolean1, ...)	Returns true if and only if all parameters are true.	and(true, true) = true, and(true, false) = false
not(Boolean b)	Returns false if b is true, and true if b is false.	not (false) = true
or(boolean1, ...)	Returns true if any parameters are true.	or(false, true) = true
isWithinRange(Number num, Number min, Number max)	Returns true if num is greater than or equal to min and less than or equal to max.	isWithinRange(3, 3, 5) = true isWithinRange(2, 3, 5) = false
getDropdownKeySet(String list_name)	Returns a collection of the keys in the supplied dropdown list. This list must be defined in the DropDown editor.	valueAt(2, getDropdown-KeySet("my_list"))
createList	Returns list made up of passed in variables.	create list(123, “Hello World”,“three”, 4.5)
getDropdownKeySet(String list_name)	Returns a collection of keys in the supplied dropdown list. This list must be defined in the DropDown Editor.	valueAt(2, getDropDown-KeySet(“*my_list*”))
ifElse (Boolean c, Val2, Val2)	Returns Val1 if c is true or Val2 if c is false	ifElse (true,”*first*”,”*second*”) = “*first*” ifElse(false,”*frist*”,”*second*”) = “*second*
valueAt(Number index,creat-eList values)	Returns the value at position *index* in the collection *values*	*valueA*(*1,createList(:”a”,”b”,”c*”) =”*b”*
strToUpper(String s)	Returns s converted to upper case	strToLower("Hello World") = "HELLO WORLD
strToLower(String s)	Returns s converted to lower case	strToLower("Hello World") = "hello world"
concat(String s, ...)	Appends two or more pieces of text together	concat("Hello", " ", "World") = "Hello World"
toString(val)	Converts the given value to a string	toString(5.5)=”5.5”

Function	Description	Example
translateLabel(String label, Strng module)	Returns the translated version of a given label key.	transate-Label(“LABEL_NAME”,”Accounts”) = “Name”
getDropdownValue(String list_name, String key)	Returns the translated value for the given key found in the list_name DropDown list. This list must be defined in the DropDown editor.	getDropdownValue("my_list", "foo")
date(String d)	Converts the given string in the current user’s date format into a date	date("5/20/2011")
today()	Returns a date object representing todays date	
now()	Returns a date object representing today’s date and the current time	addDays(now(), 7) = (one week from now)
addDays($date, $days)	Returns a date object moved forward or backwards by $days days	addDays(date("1/1/2010"), 5) = "1/6/2010"/
isAfter(Date day1, Date day2)	Returns true day1 is after day2	isAfter(date("1/1/2001"), date("2/2/2002")) = false
isBefore(Date day1, Date day2)	Returns true day1 is before day2	(date("1/1/2001"), date("2/2/2002")) = true
dayofweek(Date d)	Returns the day of week that d falls on	Sun = 0, Mon = 1, ... , Sat = 6
daysUntil(Date d)	Returns number of days from now until the specified date	
monthofyear(Date d)	Returns the month of year that d is in	Jan = 1, Feb = 2, ... , Dec = 12

You can use the following field types to create Calculated Value fields:

TextField

Checkbox

Currency

Decimal

Encrypt

Float

IFrame

Image

Integer

Phone

TextArea

Date

Datetime

Creating a Calculated Value field

1. In Studio, navigate to the module in which you want to create the field.
2. Create a field using any of the field types mentioned above.
3. Enable the **Calculated Value** option.

   Sugar displays a **Formula** field beneath the **Calculated Value** option.
4. Click **Edit Formula.**

   Sugar displays the Formula Builder pop-up window. This top section of this window displays a text area to enter the formula. Available functions and fields appear below in as separate lists. For the description of a function, point your cursor at its name.
5. To find a function, enter the full or partial name in the Search field above the **Functions** list. Alternatively, scroll down the list to select it.

   Sugar displays the selected function in the text area. If you have already selected a field, Sugar appends the function to the field.
6. To find a field, enter its full or partial name. Alternatively, select the appropriate field from the **Fields** list.

   Sugar displays the selected field in the text area. If you have already selected a function, Sugar appends the field to the function.

   To view the full list of functions or fields after searching for a function or a field, delete the text in the Search field.
7. Click **Save** to create the formula.

   Sugar validates the formula and saves it. In case of an error, the system does not save the formula, and displays an error message.
8. Add the field to the Detail View and Edit View layouts.

   You can also add it to other layouts such as Search and Sugar Dashlet.

Note: In Sugar Mobile , you can add it to the Edit View layout. However, the values are calculated and displayed only after you save the record.

9. Save and deploy your changes.

   Sugar displays the Calculated Value field in the Detail View of records in the module.

The section below lists some examples of creating formulas. For detailed information, see the chapter on Sugar Logic in the 6.2.0 *Sugar Developer Guide*.

Examples of Calculated Value formulas. The following are some examples of creating formulas for Calculated Value fields.

- **Commission Amount for Opportunities**

  This formula calculates the value for an estimated sales commission@10%, based on the opportunity amount.

  ```
  multiply ($amount, 0.1)
  ```

- **Lead Scores**

  This formula scores Leads using the following criteria:

  - 10 points for entering a name longer than 5 characters (probably a real name).
  - 5 points for having a mobile or work phone number (10 points for both).
  - 10 points for being referred.
  - 10 points for lead opportunities worth 1,000 or more.

```
add (
    ifElse(greaterThan(strlen(concat($first_name,
$last_name)), 5), 10, 0),
    ifElse(equal($phone_mobile, ""), 0, 5),
    ifElse(equal($phone_work, ""), 0, 5),
    ifElse(equal($refered_by, ""), 0, 10),
   ifElse(greaterThan(number($opportunity_amount), 999),
0, 10)
)
```

- **Account Rating**

  This formula rates accounts as small, medium, and large based on the number of employees; 0-50 employees = Small, 50-100 employees = Medium, more than 100 employees = Large.

```
ifElse(equal($employees, ""), "Small",
ifElse(greaterThan(number($employees), 100), "Large",
ifElse(greaterThan(number($employees), 50), "Medium",
"Small")))
```

- **Account Region**

  This formula creates a Region field and populates it automatically based on the State.

```
ifElse(isInList(strToUpper($billing_address_state),
     createList("CA", "AZ", "WA", "OR", "NV", "UT",
"ID")), "West",
ifElse(isInList(strToUpper($billing_address_state),
    createList("MT", "WY", "CO", "NM", "ND", "SD", "NE",
"KS", "TX")), "Mountain",
ifElse(isInList(strToUpper($billing_address_state),
    createList("ME", "NY", "PA", "WV", "VA", "NC", "SC",
"GA", "DL")), "East",
"Misc")))
```

- **Displaying field values across multiple tabs of a layout**

  You can use Calculated Value fields to display a field value across tabs in Detail View and Edit View.

In this example, using the Accounts module, we mirror the value of the **Industry** field from the **More Information** tab to the **Other** tab, in Detail View and Edit View.

a. Create a new Calculated Value field named **Industry**.

b. In the Formula Builder, select *$industry* from the Fields list.

   Sugar displays the field in the text area.

c. Add the field to the **Other** tab of the Detail View and Edit View layouts.

When the value of **Industry** field on the **More Information** tab changes, the value of the **Industry** field on the **Other** tab changes as well.

Creating a Dependent Value field

Formulas can be created to determine whether a field is visible within the Edit and Details View layouts. The created formulas have outputs that are either True or False. Fields created using dependent values will display only when the output of the formula is True. Follow the steps listed below to create dependent fields for example in the **Date Created** field in **Accounts** module

1. Click Studio in the **Developer Tools** section of the **Administration** page.
2. Select **Fields** under **Accounts** in the **Modules** section.
3. Select **date_entered** in the **Edit Fields** pane.

   This displays the **Edit Field** pane.
4. Select the **Dependent** checkbox in the **Edit Field** pane.

   This displays the **Visible if** field.
5. Click the **Edit Formula** button.

   This displays the **Formula Builder** pop-up box. Items listed in the Functions column display the function details, description and examples when you mouse-over them to help you create functions.
6. Select functions and fields from the **Functions** and **Fields** columns and click **Save** in the **Formula Builder** pop-up box.
7. Click **Save** in the **Edit Field** pane.

Enable search using date and number ranges

Admin users can manage settings for date/datetime and number fields to enable users to run searches on date and number ranges.

Follow the steps listed below to enable users to run searches on date and number ranges in date/datetime and number fields, for example Date Created fields in Accounts module

1. Click **Studio** in the **Developer Tools** section of the **Administration** page.
2. Select fields under **Accounts** in the **Modules** section.
3. Select date_entered in the **Edit Fields** pane.

   This opens the **Edit Field** pane.

4. Select the **Enable Range Search** checkbox in the **Edit Field** pane and click **Save**.

Editing Subpanels

Every record's Detail View displays sub-panels for related records from other modules. You can add or remove fields for these sub-panels depending on the information that you want to display to users. You can also rename a sub-panel if needed.

To edit a sub-panel

1. Select the module and then click **Subpanels**.

   Sugar displays the sub-panels for the selected module on the page.
2. Select the sub-panel that you want to edit.

   The page displays the list of default fields and a list of fields that are available for display.
3. To change the sub-panel's name, enter the new name in the **Title** field.
4. To add a field to the sub-panel, select it from the **Hidden** column and drag it to the **Default** column.
5. To remove a field from the sub-panel, select it from the **Default** column and drag it to the **Hidden** column.
6. To save and display your changes in the module, click **Save & Deploy**.
7. If you do not want the changes that you made, click **Restore Default** to change back the layout to its original form.

   Note: You cannot use the **Restore Default** button to restore the default title of the sub-panel.
8. To view a list of time stamps for changes that were made to the sub-panel, click **View History**.

   You can view changes that were made at a particular time on a certain date and reinstate those changes if needed. For more information, see To preview and restore changes.

Editing Layouts for Sugar Modules

You can edit the page layouts for modules in Sugarand Sugar Mobile. You can move fields, add fields, and remove fields. You can also change the tabbing order to move from field to field.

The breadcrumbs to navigate back to Studio display above the layout. The Toolbox stores fields that are not currently displayed in the layout. It also provides new rows to add to the view and a list of available fields that you can add.

You can edit the following layouts for a module:

- List View
- Detail View

- Edit View
- Convert Lead form for the Leads module
- Quick Create form
- Sugar Dashlet
  - List View
  - Search
- PopupView
  - ListView
  - Search
- Search
  - Basic Search form
  - Advanced Search form
- Sub-panels
- Mobile Layouts:

  For web browser-based mobile view, you can edit the following layouts:
  - Mobile EditView
  - Mobile DetailView
  - Mobile ListView
  - Mobile Search

  For Sugar Mobile, you an edit the following layouts:
  - Mobile EditView
  - Mobile DetailView

List View Layout. When you select **List View**, the system displays separate columns of fields that are currently displayed in the view, fields that are available for display, and hidden fields. You can click and drag a field from one column to the other depending on what you want to display to users.

Detail View, Edit View, and Quick Create Form Layouts. When you select **Detail View** or **Edit View**, the system displays the various sections of the current layout, along with the fields in each section. You can click and drag a field to a different location within the layout.

For Edit View, Detail View, and Quick Create forms, you can also change the order in which the user tabs from field to field. For example, when users create a new account, they can tab from the **Account Name** field to the **Website** field and so on. You can change the tabbing order to so that users tab from account name to email.

To edit List View

1. In Studio, select the module.
2. Click **Layouts,** and then click **ListView**.

To edit a Sugar Dashlet List View, navigate to **Layouts > Sugar Dashlet > Sugar Dashlet ListView**.

To edit the List View for a Pop-up window, navigate to **Layouts > PopupView > Popup ListView**. Sugar displays the Pop-up window when you click **Select** in the sub-panel of a related module in a Detail View.

To edit the List View for Sugar Mobile and Sugar Mobile for iPhone, navigate to **Layouts > Mobile Layouts**> **Mobile ListView**.

Sugar displays the **List View** page on the screen. The **Default** column lists fields that currently display in the User Interface. The **Available** column lists fields that are available to users through Advanced Search. Users can search for and add any of these fields that they want to view in the search results. The **Hidden** column lists fields that you do not want users to view when they perform an advanced search.

3. To display a field in List View, select and drag the field from the **Available** or **Hidden** column and drop it into the **Default** column.
4. To remove a field from List View, select and drag the field from the **Default** column and drop it in the **Available** column.
5. To hide a field from users, drag it from the **Default** or **Available** column and drop it in the **Hidden** column.
6. To move a field within the layout, drag and drop it into its new location.
7. Click **Save & Deploy** to display the updated List View in the User Interface.
8. Click **View History** to view a list of previous changes along with the date and time of each change.
   a. To preview the changes made at a particular time, click the adjacent **Preview** button.
   b. To restore the previous version of the List View, click the adjacent **Restore** button.
9. To revert back to the default layout, click **Restore Default**.

To edit a Detail View, Edit View, or Quick Create form

1. Select the module in Studio.

   To edit the Detail View layout, navigate to **Layouts > Detail View**

   To edit the Edit View layout, navigate to **Layouts > Edit View**

   To edit the Quick Create form layout, navigate to **Layouts > Quick Create.**

   To edit a layout for Sugar Mobile and Sugar Mobile for iPhone, navigate to **Layouts** > **Mobile Layouts**, and select the layout of your choice.

   Note: Only changes to the Edit View are applicable to Sugar Mobile for iPhone.

2. You can edit a layout as follows:
   - To add new fields or replace existing ones with blanks, drag the filler row under **New Row** and drop it into the layout. You can then drag a field from the **Toolbox** into the filler row.

Note: In the Edit View layout of the **Leads** module, the **First Name** and **Last Name** fields are used to input the lead's name. Sugar concats these two values to display the lead's name in the Detail View.

- To remove an existing field, drag it to the **Recycling Bin** in the **Toolbox**. The field is removed from the layout, but is not deleted from the system.
- To replace an existing row in the layout with another one, drag the new field from **Available Fields** and drop it on the field that you want to replace.
- To create a panel or row, drag **New Panel** or **New Row** into the Current Layout.
- A new panel or row contains two blanks fields. To add more fields to the panel or row, drag **New Panel** or **New Row** into the panel again.
- To enter or edit a field label, click the **Edit** icon within the field and enter the label in the **Properties** panel; click **Save** to create the label.
- To move a field to a different location, drag it to the desired location on the page.
- To edit the tabbing order, click the **Edit** icon within the field and enter a numeric value in the Tab Order field of the Properties panel; click **Save**. The tabbing order for each field is represented by numbers such as 1, 2, and 3. You can change one or more numbers to change the order in which users tab to those fields.
- To display each panel as a separate tab instead of displaying all panels on one page, select the **Display Tabs as Panels** option located next to the **Restore Default** button.

3. Click **Save** to save your changes.
4. Click **Save & Deploy** to display the updated view in the Sugar User Interface.
5. Click **View History** to view a list of previous changes along with the date and time of each change.
   a. To preview the changes made at a particular time, click the adjacent **Preview** button.
   b. To restore the previous version of the view, click the adjacent **Restore** button.
6. To revert back to the default layout, click **Restore Default**.

Copy/Sync Edit and Detail Views

Modifications made to the Edit View in Layouts can be copied to the Detail View. The Layouts Detail View can also be synced with the Edit View so that any changes made to the Edit View are automatically reflected in the Detail View.

To copy/sync Edit and Detail Views

Follow the steps listed below to sync modifications made to the Edit View of Layouts of a module, for example **Accounts**, to the Detail View of the Layouts of the same:

1. Click **Studio** in the **Developer Tools** section of the **Administration** page.
2. Select **Layouts** under **Accounts** in the **Modules** section.

3. Click **EditView** in the **Accounts Layouts** pane.
4. Drag and drop items between the **Toolbox** and **Layout** sections.
5. Select the **Sync to DetailView** checkbox.
6. Click **Save and Deploy**.
7. Go to the **Accounts** module in Sugar to verify that the changes have been deployed

To edit the Search form

1. To edit the Search form for the module, click the module, navigate to **Search,** and select **Basic Search** or **Advanced Search**.

    To edit the Search form of the module's Sugar Dashlet, navigate to **Sugar Dashlet** > **Sugar Dashlet Search**.

    To edit the module's Popup View Search form, navigate to **PopupView > Popup Search**.

    To edit the Search form for Sugar Mobile and Sugar Mobile for iPhone, navigate to **Mobile Layouts > Mobile Search**.

    The fields in the current Search form are listed in the **Default** column, and the available fields are listed in the **Hidden** column.
2. To remove an existing field from the search form, drag it from the **Default** list to the **Hidden** list.
3. To add a field to the search form, drag it from **Hidden** column to the **Default** column.
4. To save your changes, click **Save & Deploy**.
5. To revert back to the default layout, click **Restore Default**.

Note: You cannot use fields from related modules in Mobile Search.

To preview and restore changes

1. Click **View History** to view a list of time stamps for changes that were made to a layout, a Search form, or a sub-panel.
2. To preview the changes for a timestamp, click the adjacent **Preview** button.

    The **Preview** page provides a **Restore** button that corresponds to each timestamp. You can use this button to restore the changes made for a specific timestamp. Alternatively, click a timestamp to restore the layout that existed before the changes made at that time.

To edit the Convert Lead form

1. In Studio, select the **Leads** module and navigate to **Layouts**.
2. Select **Convert Lead** to view the **Convert** page.

    This page displays a list of related modules, such as accounts, opportunities, notes, and so on. Users can create these related record during the process of converting a lead to a contact. You can add and remove related modules as needed.

3. If you want the user to create a record in a related module during lead conversion, select the **Required** box corresponding to the module. The user will then have to create the related record in order to successfully convert the lead to a contact.
4. To copy values from fields that exist in both Leads and a related module to the newly created records, select the **Copy Data** box corresponding to the related module. The fields must have the same name in both modules. For example, if you add a custom field called **Category** to both Leads and Notes, and then enable the **Copy Data** option for the Notes module, the **Category** field in Leads will be copied into any new Notes created during the convert Lead process.
5. To select a record from a module that has a one-to-one relationship, or a one-to-many relationship with the Contacts module (that is, many contact records associated with one record in the related module), select the **Allow Selection** box. By default, only the Accounts module has a relationship with the Contacts module, hence the **Allow Selection** box is selected for Accounts.
6. To edit a module's page layout, click the **Edit** icon, make the necessary changes, and click **Save**.
7. To remove the relationship with a related module, click the **Delete** icon, and click **OK** to confirm the removal.

   The deleted module no longer displays in the list of related modules in the Convert Lead form.

Exporting Module Customizations

You can export a module's customized layouts, fields, and field labels from one Sugar instance to other Sugar instances. To do this, you will need to package the customizations in Studio, export it to your local machine, and upload it into another Sugar instance. The system applies the customizations to the appropriate layouts, fields, and field labels.

To publish a customized module

1. On the Studio home page, click **Export Customizations**.

   The **Export Customizations** page displays a list of customized modules and the type of customization, such as customized layouts, fields, or labels.
2. Enter the following information:

   Package Name. Enter a name for the export package. The package will contain the customizations that you select.

   Author. Enter your name as the author.

   Description. Enter a brief description of the package.
3. Select the customizations you want to export.
4. Click **Export**.

   The system creates a zip file and displays a dialog box that allows you to open the file or save it to a disk.

5. Select **Save to Disk** and click **OK**.

   On Windows, the system saves the zip file in the **Downloads** directory.

6. Open the other Sugar instance, upload and install the zip file using Module Loader. For more information, see Module Loader.

Embedding Links and IFrames in a Layout

A Link field allows you to store a URL in a record such as a customer's website or a link to a related internal or external system. The URL can either be entered as a normal field in an Edit View, or it can be dynamically generated based on other fields in the record. For example, you can automatically generate a link to a google map of an account's address. To do this, click the **Generate URL** check box and insert the following in the Default Value field:

`http://maps.google.com/?q=`

Next, select **billing_address_postalcode** from the drop down above the Default Value field and click the **Insert Field** button.

The default value now reads:

`http://maps.google.com/?q=`***`{billing_address_postalcode}`***

You can also embed a view of the website itself in the layout rather than as a link by using the IFrame field. IFrames support regular URLs as well as generated URLs.

You cannot edit generated URLs in a record's Edit View. You can only change them in the Module Builder or Studio. You can edit regular URLs in a record's Edit view.

To embed a manually entered URL

1. From the **Data Type** drop-down list, select **IFrame** or **URL**.
2. Enter a name for the field.
3. Enter the desired max size.
4. If using an IFrame, enter the desired height in pixels for the view.
5. Click **Save** to create the field.

To embed a dynamically generated URL

1. From the **Data Type** drop-down list, select **IFrame** or **URL**.
2. Enter a name for the field
3. Click the **Generate URL** checkbox.
4. Insert the base URL into the **Default Value** field.
5. Select a field you wish to include in the URL from the dropdown and click I**nsert Field**.
6. Click **Save** to create the field.

Creating Relationships

Typically, a Sugar module has relationships with other Sugar modules. For example, Accounts is related to Contacts, Leads, Opportunities, and several other modules.

Related records from these modules display in fields or sub-panels on an account's detail page. You cannot edit these pre-defined relationships.

In Module Builder, you can create relationships between undeployed modules, and between undeployed modules and deployed modules. If you want to change a relationship after you have deployed the module, you can redefine or delete the relationship and then re-deploy the module package.

In Studio, you can create relationships only between deployed modules. After you deploy a relationship in Studio, you cannot change it.

You create one relationship at a time from the Relationship Editor. When you create a relationship for a module, it is considered to be the primary module and the module that you relate it with is the related module. Depending on the relationship type, the relationship is expressed with sub-panels and related-to fields. When you create a new relationship between two modules, the system automatically creates the necessary sub-panels, related-to fields, and metadata relationships.

Note: It is recommended that you use a Relate field to create a one-way relationship between modules. To create a two-way relationship between modules, use the Relationship Editor.

You can also create a relationship between a module and itself. In this case, the relationship becomes a parent-child relationship. For example, you can create a relationship from Accounts to Accounts in order to create sub-accounts within the primary account.

In Module Builder, you can select Activities as the related module but not its sub-modules such as Tasks, Calls, and Meetings. The relationship is automatically reflected in these sub-modules.

In Studio, you can select a sub-module of Activities when you create a relationship. So, when you select Activities as a related module in the Module Builder, you can use Studio to define the relationship further for its sub-modules.

Relationship Types. The relationship types are as follows:

One-to-one: Records in the primary module and the related module are uniquely related to each other. For example, an account can be associated with only one contact and a contact can be associated with only one account. This account value will display in the contact's Detail View, and the contact value will display on the account's Detail View.

One-to-many: A record in the primary module can have relationships with many records in the related module. For example, an account can be associated with many contacts, and many contacts can be associated with the same account. The Detail View of the primary module will display a sub-panel for the related module, and the Detail View of the related module will display a Related-to field containing a link to the related record.

Many-to-one: Records in the primary module can have a relationship with one record in the related module. For example, an account can be associated with one contact. The Detail View of the primary module will display a field for the related module from which you can select a record, and the Detail View of the related module will show a sub-panel for the primary module from which you can create or select records.

Many-to-many: In this relationship, records in both the primary module and the related module can have relationships with multiple records in each module. For example, an account can be associated with many bugs, and a bug can be associated with many accounts. The Accounts Detail View will display a Bugs sub-panel. Similarly, the Bugs Detail View will display an Accounts sub-panel.

The type of relationship that you can create depends on your choice of primary and related modules. This is because only a module with sub-panels can have a one-to-many or a many-to-many relationship with another module. A sub-panel is needed to show all the related records from the other module.

For example, with Accounts as the primary module and Knowledge Base as the related module, you can create only a one-to-one relationship between them. This is because Knowledge Base lacks a sub-panel. Therefore, Accounts cannot display related records from Knowledge Base. However, if Knowledge Base is the primary module and Accounts is the related module, you can create a one-to-many relationship between them because Accounts has sub-panels and, therefore, Knowledge Base can display related records from Accounts.

If you are creating a relationship between a custom module and a Sugar module, then you can choose any relationship type because all custom module types include at least one sub-panel.

Sub-panel Types. Sugar provides many sub-panel types for your use. When you create a relationship that involves sub-panels, Sugar displays all sub-panel types available for that module for your selection. A sub-panel can display different sets of fields depending on the primary module to which it is related. For example, there are several types of sub-panels for Contacts. The Contacts sub-panel that appears under Accounts contains different fields than the Contacts sub-panel that appears under Cases.

The **Default** type of sub-panel contains the most commonly used fields in the module. Every module has a **Default** type that contains a set of fields to display as a sub-panel. Select **Default** if you want to display the most commonly used fields in the sub-panel in the relationship that you create.

For example, if you create a one-to-many relationship between Calls and Accounts, you can select a sub-panel type for the Accounts sub-panel in the Calls Detail View. To use a sub-panel consisting of the most commonly used fields from Accounts, select the **Default** sub-panel type; to use the Accounts sub-panel from the email's Detail View, select **ForEmails**.

You can create relationships in Module Builder as well as in Studio. However, there are some differences, which are noted in the table below:

Relationship in Module Builder	Relationships in Studio
You can create relationships with other Sugar modules as well as other modules within any undeployed package.	In Studio, you can create relationships only between deployed modules.
If you want to change a relationship after you have deployed the module, you can redefine or delete the relationship and then re-deploy the module package.	You can delete a relationship after you deploy it, but you cannot redefine it.
You can select Activities as the related module but not its sub-modules such as Tasks, Calls, and Meetings. But the relationship is automatically reflected in these sub-modules.	You can select a sub-module of Activities when you create a relationship. So, when you select Activities as a related module in the Module Builder, you can use Studio to further define the relationship for its sub-modules.

To create a relationship in Module Builder

1. Click the custom module to view its details.
2. Click **View Relationships**.

   Sugar displays existing relationships, if any, on the page.
3. Click **Add Relationship**.
4. To localize the relationship label, select the language pack from the **Language** drop-down list.
5. Select the relationship from the **Type** drop-down list.

   If you select a **One-to-One** relationship, you can choose a related module. Sugar displays the related module as a field in the primary module, and the primary module as a field in the related module.

   If you select a **One-to-Many** relationship, you can select a related module. Sugar displays sub-panels of the related modules in the Detail View of the primary module. The sub-panel options vary depending on the related module that you select.

   If you select a **Many-to-One** relationship, you can select a related module. Sugar displays a the primary module as a sub-panel in the Detail View of the related module.

   If you select a **Many-to-Many** relationship, you can select sub-panels for the primary module as well as the related module.
6. From **Related Module** drop-down list, select the module you want to relate to the primary module.
7. From the Subpanel field for the related module, select the sub-panel type that you want displayed on the detail page of the primary module.
8. From the **Subpanel** field for the primary module, select the sub-panel that you want displayed on the detail page of the related module.

9. Click **Save** to create the relationship.

   The new relationship displays under the **Add Relationship** button in the middle panel. Sugar appends it with an asterisk to denote a custom relationship.

To create a relationship in Studio

1. Select the module in Studio and click **Relationships**.

   Sugar displays a list of existing relationships for the primary module on the page.
2. To create a relationship, click **Add Relationship**.

   The Relationship Editor displays on the page.
3. Follow the process described in To create a relationship in Module Builder.

To manage a relationship

1. To edit a relationship, in Module Builder, click its name in the Relationships list and make the necessary changes in the **Edit Relationship** tab and save it.

   You cannot edit or delete relationships in Studio.
2. To delete a relationship, click **Delete**.

Rename Tabs

You can rename tabs for Sugar modules

To rename tabs

1. In Developer Tools, select **Rename Tabs**.

   The tab labels and the corresponding database values display on the page. From the drop-down list displayed above the tab labels, you can select the language to display the tab.
2. Click the label that you want to edit and replace it with the new value.
3. Click **Save** to save your changes; click **Undo** to revert to the previous value; click **Redo** to go back to your change.

Display Module Tabs and Subpanels

This option enables you to hide or display selected module tabs and sub-panels from users and reorder them as needed.

When you hide a module tab from a user, it is not visible to the user upon logging into Sugar. However, if the hidden module is related to a module that is visible to users, it displays as a sub-panel in the Detail View of the related module. Therefore, users can still access related records of the hidden module from the Detail View of the related module. Hidden modules are also available to users through the Reports module. Therefore, use roles to block users completely from accessing a module. For more information, see Role Management.

When you hide a sub-panel, users cannot view related records from the Detail View of a related module.

You can allow users to configure tabs for modules that they can access from their User Preferences page. This will enable users to override the global settings that you set with this option.

By default, the following modules are hidden:

Projects

Bug Tracker

Forecasts

Contracts

Knowledge Base

Note: You cannot hide the Home tab.

To configure module tabs and subpanels

1. In **Developer Tools**, select **Display Module Tabs and Subpanels**.

   Sugar displays all the module tabs and sub-panels on the **Select Module Tabs and Subpanels** page.
2. To hide a module, drag it from the **Displayed Tabs** column and drop it in the **Hidden Tabs** column; to display a module, drag it from the **Hidden Tabs** column and drop it in the **Displayed Tabs** column.
3. To rearrange the display order of a tab, drag and drop it into the desired position.
4. To prevent users from configuring module tabs, deselect the **Allow users to configure tabs** option.
5. To hide a sub-panel, drag it from the **Displayed Subpanels** column and drop it into the **Hide Subpanels** column. To display a sub-panel, drag it from the Hidden Subpanels column and drop it in the **Displayed Subpanels** column.
6. Click **Save** to save the configuration; click **Cancel** to exit the page without saving your changes.

Configure Shortcut Bar

Use this option to select the modules for which Quick Create forms would be available on the Shortcut bar. By default, Cases, Bug Tracker, Documents, and Targets are disabled, hence icons for these modules do not display in the Shortcuts bar.

To enable or disable Quick Create forms for a module

1. To enable the Quick Create form for a module, select the module from the **Disabled Modules** list and drag it to the **Active Modules** list.

   To disable the Quick Create form for a module, select the module from the **Active Modules** list and drag it to the **Disabled Modules** list.
2. Click **Save** to update the settings.

Configure Grouped Modules

You can use the Configure Grouped Modules feature to organize modules within groups. Users can select these groups to view the modules within those groups. For example, you can group the Contacts, Leads, and Opportunities modules under a Sales group, and the Cases, Bug Tracker, and Products modules under a Support group. Users can then select either the Sales group or the Support group to view the corresponding set of modules.

You can add the same module to multiple groups. For example, Contacts can be part of the Sales group as well as the Marketing group.

The system provides following group tabs:

- Sales
- Marketing
- Support
- Activities
- Collaboration
- Reports

You can change the labels for any of these tabs and also add new groups, if needed.

Users have the ability to change the configuration to grouped modules or ungrouped modules from their User Preferences page.

To configure and manage grouped modules

1. In Developer Tools, click **Configure Grouped Modules**.

   Sugar displays the default groups on the **Configure Grouped Modules** page. The associated modules are listed below each group tab.:
2. To edit the name of a group tab, click the **Edit** icon, located beneath the group name, and enter the new name in the text field; click **Save**.

   Sugar displays the new group name.
3. To remove a module tab from a group tab, place the cursor on the name and drag it to the **Remove Module from Group** bucket on the left.

   The module no longer displays under the group tab.
4. To add a module to a group tab, select it from the **Modules** list on the left, drag and drop it into the Group list, just below the **Edit** and **Delete** icons.

   Under a group tab, you can rearrange the order of the module tabs by selecting a tab name and dragging it to a different location in the list.
5. To save your changes and make them available for users, click **Save & Deploy**.

To add a new group tab

1. Click **Add Group**.

   Sugar displays a **New Group** box on the page.

2. To name the new group tab, click the **Edit** icon, enter the name in the text field, and click **Save**.
3. To add a module tab under the new group tab, select it from the **Modules** list and drop it in the group, below the **Edit** and **Delete** icons.
4. To save your changes and make it available for users in the Sugar User Interface, click **Save & Deploy**.

Dropdown Editor

Most modules display at least one drop-down field containing a list of values from which users can choose. For example, when users create an account, they can choose a specific industry type and an account type in the respective drop-down fields.

As the administrator, you can use the Dropdown Editor to create new drop-down lists, and to edit values of a drop-down list to suit your organization's needs. When you create a new drop-down field in Studio, you must associate it with an existing drop-down list.

Note: You cannot use a custom Stage drop-down list when you create a quote.

To create a drop-down list

1. Scroll down to the Developer Tools section on the Administration home page, and select **Dropdown Editor.** Alternatively, on the Studio home page, click the **Dropdown Editor** tab located at the bottom of the page.

   Sugar displays the Dropdown Editor page, which contains existing drop-down lists.

Note: You can also add a drop-down list in the process of creating a custom field with the DropDown data type in Studio.

2. Click **Add Dropdown**.

   Sugar displays fields to add a new drop-down list in the Edit drop-down tab.

   The **Name** field displays the name that you specified. The system automatically appends **_list** to the drop-down name to identify the data type in the database. You can use your own data type naming convention if needed.
3. From the **Language** drop-down list, select a pre-installed language pack of your choice.
4. In the **Item Name** field, enter a name for the item.
5. This is the name that is saved in the Sugar database.
6. In the **Display Label** field, enter a label name for the item.

   This is the label that displays to users.
7. Click **Add**.

The name of the item displays above the **Item Name** field. This is the name that displays in the User Interface. To add additional items, click **Add** and repeat the process.

8. To display the items in ascending order, click **Sort Ascending**; to display them in descending order, click **Sort Descending**.
9. Click **Save** to save the drop-down list.

   The list displays in the dropdown list on the **Edit Field** tab of a module.

To edit an existing drop-down list

1. Select an existing drop-down field from the Dropdown Editor.
2. To change an item's display label, click the corresponding **Edit** icon and enter the new label.
3. To remove an item, click the corresponding **Delete** icon.
4. To add a new item, enter the item name and display label in the fields below; to add additional items, click **Add** and enter values for the next item.
5. Click **Save** to save your changes; to undo your changes, click **Undo**; to redo your changes, click **Redo**.

Workflow Management

Workflows enable you to track events, set out alerts, and execute necessary actions when the specified conditions are met; for example, when a time period expires or a record changes, Sugar can send out an alert to the assigned user and team.

Note: You must first enable the notification settings to send alerts to recipients. If the events are time-based, records must be initially saved or changed to start the timed event.

The workflow cycle is as follows:

1. Create a workflow definition.
2. Specify the conditions as described in Creating a Condition to trigger alerts, and optionally, actions.
3. Create an alert or select from existing list as described in Creating Alerts.
4. Create actions or select from existing list as described in Creating Actions.
5. In case of multiple workflows, specify the execution sequence as described in Specifying the Workflow Sequence.
6. Schedule a job to run the workflow as described in To schedule a job.

To create a workflow definition

1. In Studio, select **Workflow Management** or in the Studio wizard, select **Edit Workflow**.

   The Workflow Home page displays existing workflows on the screen. You can search for a workflow, create workflow definitions, and alert templates from this page.

2. On the Workflow Definitions tab, select **Create Workflow Definition,** and enter the following information:

   Name. Enter a name for the workflow.

   Execution Occurs. From the drop-down list, select the event to trigger the workflow. Execution can occur when a record is saved or when a specified period of time has elapsed.

   Note: Set up the cron and ensure that it executes at least once before you create a time-based workflow.

   Status. From the drop-down list, select **Active** to implement the workflow; select **Inactive** if you do not want to implement the workflow yet.

   Target Module. From the drop-down list, select the module to which the workflow applies.

   Applies to. From the drop-down list, select the records to which the workflow applies.

   Processing Order. From the drop-down list, select the sequence in which to execute the workflow.

   Description. Enter a brief description of the workflow.

3. Click **Save** to create the workflow; click **Cancel** to exit the page without creating the workflow.

   The workflow definition's Detail View displays on the screen. You can edit, delete, and duplicate the workflow from the Detail View. To create a similar workflow definition, you can duplicate the workflow, save it, and then edit it as needed to create a new workflow.

Next, on the Workflow detail page, create the conditions and the alerts.

Creating a Condition

A condition specifies the event that triggers the workflow.

To create a condition

1. In the Workflow's Detail View, click **Create** in the **Conditions** sub-panel.

   Sugar displays a list of possible conditions in a pop-up window.

2. Select a condition.

   Sugar displays the selected condition in the text field below. If the condition you select requires you to specify a field or a module, the system underlines it in the text field.

3. Double-click the field or the module in the text field.

   A pop-up window displays a drop-down list from which you can select the field or the module.

Note: Only fields marked **Reportable** can be specified in time-based workflows.

4. Click **Save**.

   Sugar displays the selected field or module in the text box.

5. Click **Save** to create the condition.

   The condition is now listed in the **Conditions** sub-panel on the Workflow detail page. Next, you must create or select an alert.

Creating Alerts

You can create individual alerts, or you can use alert templates. After you create an alert, you can specify one or more users as the recipients of the alert. You can send out alerts as emails or as invitations.

To create an Email Alert Template

1. On the Workflow Definitions tab, select **Alert Email Templates**.
2. On the **Alerts Templates** page, select the module from the drop-down list and click **Create**.
3. Enter information for the following fields:

   Name. Enter a name for the template.

   From Name. Enter the sender's name.

   From Address. Enter the sender's email address.

   Description. Enter a brief description of the template.

   Target Module. From the drop-down list, select a record or a specific field, which when updated, triggers the alert. For example, if you want to send out an alert when the ownership of an account changes, select **Ownership** from the drop-down list.

4. **Related Module**. To trigger an alert in case of a change to a related module, select the module from the drop-down list.
5. In the Alert body field, enter the text and then select the old value and click **Insert**. Then select the new value and click **Insert** again.

   For example: The ownership of this account has changed from ***<old value>*** to ***<new value>***.

6. **Alt Text**. If your system cannot render HTML, then select this box to send out the alert as a plain text message, and enter the message in plain text in the field below.
7. Click **Save** to create the template; click **Cancel** to exit the page without saving the template.

   When you create an alert from a workflow definition's Detail View, the alert template is listed in the Custom Template drop-down list when you choose Custom Template as the Source Type.

To create an alert

1. In the **Alerts** sub-panel, click **Create** to create a new alert.
2. On the **Alerts** page, enter information for the following fields:

   Name. Enter a name for the alert.

   Alert Type. From the drop-down list, select the type of alert.

   Source Type. From the drop-down list, select **Normal Message** if you will be entering the alert message in the **Alert Text** box; select **Custom Template** if you want to use a pre-existing alert template.

   Alert Text. If the source type is **Normal Message**, enter the message in this box.

   Custom Template. This field displays existing alert templates if you select **Custom Template** as the source type. Select the template from the drop-down list.
3. Click **Save** to create the alert; click **Cancel** to exit the page without creating the alert.

   The **Alert Recipient List** sub-panel displays to enable you to create a list of recipients of this alert.

To create an alert recipient list

1. In the **Alert Recipient List** sub-panel, click **Create**.

   A pop-up window displays options to select the recipients.
2. Select an option from the list.

   Sugar displays the selected option in the text field below. If an option requires you to specify details such as a user or address type, the system underlines the keywords.
3. Double-click the keyword to select from existing records.
4. Click **Save**.

   The selected users are listed in the **Alert Recipient List** sub-panel. To remove a recipient, click the Remove (**rem**) link.

   Next, you need to specify the actions to execute.

Creating Actions

You can create an action to execute when an event occurs. Some examples of actions are updating fields and creating records.

To create an action

1. On the **Workflow** detail page, click **Create** in the **Actions** sub-panel.

   A pop-up window displays a list of possible actions.

   Update fields in the target module: Value of the fields in the target record will be modified/changed.

   Update fields in a related record: Value of the fields in a related record will be changed according to the selection of options.

Create a record in a module associated with target module: A new record is created.

Create a record associated with a module related to the target module: A new record is created according to the selection.

2. Select one or more actions from the pop-up window.

   Sugar displays the selected actions in the text field below.

3. If a selected action requires you to specify a record, double-click the underlined keyword in the text field, select the related module from the drop-down list, and click **Save**.
4. Click **Save** to create the action.

Specifying the Workflow Sequence

If you created more than one workflow process for a particular module, you can rearrange the order of the execution as necessary.

To specify the workflow sequence

1. Navigate to the Workflow Detail View, and select **Workflow Sequence** on **Workflow Definitions** tab.
2. On the **Workflow Sequence** page, select the module from the drop-down list, and click **Select**.

   Sugar displays the workflow processes that you created for the module.

3. To change the workflow sequence, rearrange the process order using the Up and Down arrows.

Testing the Workflow

To test the effect of a workflow, perform the following steps:

1. Log into Sugar as an administrator.
2. Click the **Admin** link at the right-hand corner of the page.
3. On the Administration Home page, navigate to **Email** > **Email Settings** and ensure that the Email settings are correct. Issuing alerts depend on these settings.
4. Ensure that the **Enable Notifications On?** option is selected. This is required to send a Workflow Alert to the intended recipient.
5. Log in as a Sugar user.
6. Click **User Preferences**.
7. Change the email address to an address from which you can retrieve emails.
8. Access an opportunity.
9. Change the **Sales Stage** to **Closed Won**.
10. Save the record.

    You should now receive an email regarding the opportunity win. A new case is also created for the account associated with the opportunity when the Sales Stage becomes **Closed Won**.

Workflow Example

The following example describes how to automatically create and assign a task when an opportunity closes as **Closed Won**. This involves creating a workflow definition that specifies the conditions for executing the workflow, the users and/or teams who receive the alert, and the actions that occur during execution

Preconditions:

- The Scheduler is set to run automatically
- System Email Settings have been configured

Step 1: Create the workflow definition:

a. Target module is **Opportunities**
b. Execution Occurs **When the record is saved**
c. Processing Order is **Alerts then Actions**
d. Status is **Active**.
e. Save the workflow definition.

Step 2: In the Conditions sub-panel of the workflow's Detail View:

a. Select the condition **When a field in the target module contains a specified value**.
b. Click **Next**, and click the **specific field** link, select **Sales Stage** from the Field Drop-down list, and select **Sales Stage Equals Closed Won** as the field in the target module.
c. Save the condition

Step 3: Create the alert:

a. In the Alerts sub-panel of the workflow's Detail View, click **Create**, and enter a name for the alert.
b. Select **Email** as the **Alert** type, and enter the message in the **Alert Text** field.
c. Select **Normal Message** as the **Source** type, and save the alert.
d. In the Alert Recipient sub-panel of alert's Detail View, click **Create**, and select **A user associated with the target module**.
e. Click **Next**, and select **User who is assigned the record**.
f. Save the alert, and in the alert's Detail View, click the **Return to Workflow Definition** link.

Step 4: Create the action:

- In the Actions sub-panel of the workflow's Detail View, click **Create**.
- Select the action **Create a record in a module associated with target module**.
- Click the **record** link that displays below and select **Task** as the module.
- Click **Next**, and select the fields that you want to populate in the task record, such as the subject line, due date, and assigned user.

- Click the links for the selected fields and enter values. For example, enter **Call Contact** as the Subject, and select **1 day from Triggered Date** as the due date.
- Save the task.

The workflow definition is now complete.

Step 5: Check the Scheduler to ensure that workflow will be executed.

a. Navigate to **Admin > System > Scheduler**.

b. Click **Scheduler**, and ensure that the **Process Workflow Tasks** job is active. You can click the job to view or edit its details, such as the Start date and time.

Step 5: Test the workflow as described in Testing the Workflow.

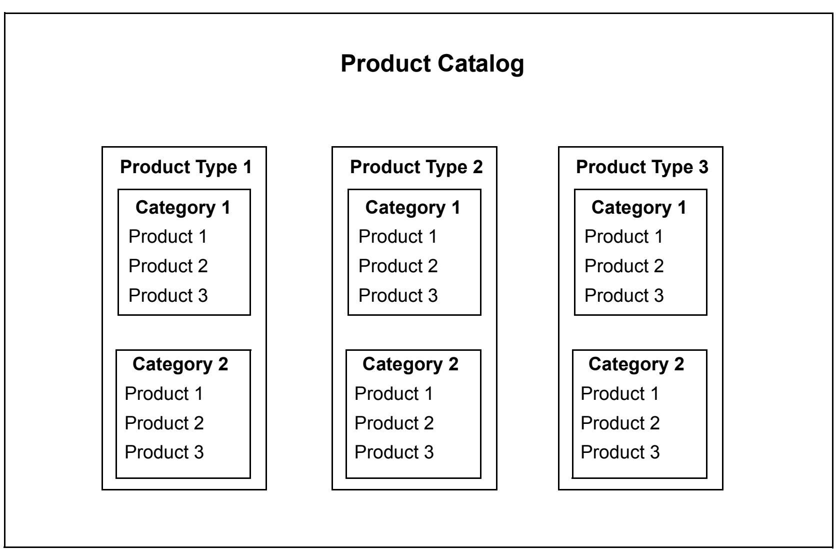
Products and Quotes

This section consists of the following options that enable you to manage the product catalog, along with the related information on manufacturers and shipping providers.

- **Product Catalog**
- **Product Types**
- **Product Categories**
- **Manufacturers**
- **Shipping Providers**
- **Tax Rates**

Products can be broadly classified into product types; for example, Software and Hardware. Each product type can be further organized into several categories. For example, the software product type can contain product categories such as Spreadsheets and Word Processors. You can create categories within a category.

The figure below illustrates product groupings within the catalog.



Product Catalog

Use this option to maintain the product catalog for your organization.

From the Product Catalog Home page, you can view a list of current products. You can add new products to the catalog or import the data from CRM applications such as Salesforce.com or through a .csv file.

Product Types

The Product Types option enables you to classify records in the product catalog. You can also import product types as described in Importing Data.

Product Categories

The Product Categories option enables you to create new categories to further group records under a Product Type. You can also import product category information from an external location.

Manufacturers

The Manufacturers option enables you to maintain a list of product manufacturers and specify the order in which they are presented for selection in the Quotes module. You can also import manufacturer data from an external location.

Shipping Providers

The Shipping Provider option enables you to maintain a list of shipping providers for selection in the Quotes module.

Tax Rates

The Tax Rates option lets you maintain a list of national and international tax rates. Tax Rates are available for selection in the Quotes module.

Adding Products to the Catalog

You can add items to the product catalog.

To add a product to the catalog

1. On the **Administration Home** page, click the **Product Catalog** option in the **Product and Quotes** sub-panel.
2. On the **Product Catalog** tab, click **Create Product for Catalog**.
3. On the **Product Catalog** page, enter information for the following fields:

   Product Name. Enter the name of the item.

   Category. Click **Select** to choose the category to which the new item belongs; click **Clear** to delete the selection.

   Product URL. Enter the URL to where the product information is located.

Tax Class. From the drop-down list, select the appropriate option to specify whether the item is taxable or not.

Manufacturer. From the drop-down list, select the manufacturer of the item.

Mft. Part Number. Enter the manufacturer's part number for the item.

Vendor Part Number. Enter the retailer's part number for the item.

Currency. From the drop-down list, select the currency in which the price is quoted.

Cost. Enter the cost price of the item. This price will not appear in quotes.

List Price. Enter the list price of the item.

Discount Price. This is the minimum price of the item. The system calculates this price based on the percentage that you specify in the Default Pricing Formula field, described below.

Default Pricing Formula. From the drop-down list, select a formula to arrive at the discount price.

Depending on the formula, the system takes the cost price into consideration to calculate the discount price. If you select Profit Margin, enter the points in the adjoining field; if you select Markup over Cost or Discount from List, enter the percentage in the adjoining field.

Availability. From the drop-down list, select whether the item is in stock or not.

Date Available. If the item is out of stock, click the **Calendar** icon and select the date when it will be available.

Quantity in Stock. Enter the number of units that are in stock.

Weight. Enter the item weight.

Type. From the drop-down list, select from product type to which the item belongs.

Support Name. Enter the name of the Customer Support person.

Support Contact. Enter the person's contact information, such as the phone number.

Support Desc. Enter a brief description for the type of support provided to customers.

Support Term. From the drop-down list, select the length of the support period.

Description. Enter a description of the product.

4. Click **Save** to add the product to the catalog; click **Cancel** to exit the page without creating the product.

To manage the product catalog

1. To view the details of an item, click its name in the **Product Catalog List**.
2. To edit the information, on the detail page, click **Edit**, revise the information, and click **Save**.
3. To duplicate the information, on the detail page, click **Duplicate**, and click **Save**.

4. To delete an item, on the detail page, click **Delete**. When you delete a product type or category, all records under it are also deleted.
5. To import products, on the Products tab, select **Import Products**, and follow the process described in Importing Data.
6. To export item data from the catalog to your local machine, click the Export link in the Product Catalog List sub-panel, and follow the process described in **Exporting Data**.
7. To update or delete some or all the records on the Product Catalog list, use the Mass Update sub-panel as described in Editing and Deleting Multiple Records.

Pricing Formulas

When you create a product for the catalog, you can specify one of the following pricing formulas to calculate the discount price. Each formula includes a factor that is a percentage represented as a whole number. For example, 15% would be a factor of 15.

Pricing Formula	Description	Example
Fixed Price: $discount_price	Price is the discount price.	If the discount price is $90, then the price is $90.
Cost Markup: $cost_price * (1+($factor/ 100));	Price is a percentage above the cost price	If cost price is $100 and the markup is 15, then the price is: 100 * (1+15/100) = $115
Price List Discount : $list_price * (1-($factor/100));	Price is a percentage below the list price	If list price is $100 and the discount is 15, then the price is: 100 * (1-15/100) = $85
List Price: $list_price	Price is the list price	If list price is $100, then the price is $100.
Profit Margin: $cost_price * 100/(100-$factor);	Price is a percentage above cost price	If cost price is $100 and the markup is 15, then the price is: $ 100*100/(100-15) = 117.64

To create a product type

1. On the Product Catalog Home page, click **Product Types**, and then click **Create**. Alternatively, on the **Administration Home** page, click **Product Types** in the **Products and Quotes** sub-panel, and then click **Product Type List** from the module tab.

   The Product Types Home page displays fields to create a new type.
2. Enter information for the following fields:

   Product Type. Enter a name for the new product type.

   Description. Enter a brief description for the product type.

   Order. Enter a number to specify the order in which the product type will appear in the drop-down list.

3. To create the type, click **Save**.
4. To create another product type, click **Save & Create New**.

To manage product types

1. To view the details of a product type, click its name in the **Product Type List**.

   At the bottom of the page, the **Product Type** sub-panel displays the details.
2. To edit the details, revise the information in the **Product Type** fields and click **Save**.

   The revised product type is displayed at the end of the list.
3. To delete a product type, click the **del** icon corresponding to the name in the Product Type List; click **OK** to confirm the deletion.
4. To import product type data, on the Products tab, click **Import Product Types**, and follow the process described in Importing Data.

To create a product category

1. On the **Administration Home** page, click the **Product Categories** option in the **Product and Quotes** sub-panel.
2. In the **Product Categories Home** page, click **Create**.

   Sugar displays fields to create a new category in the Product Category sub-panel.
3. Enter information for the following fields:

   Product Category. Enter a name for the category.

   Parent Category. If the product category is a sub-set of another category, click **Select** to choose the parent from the **Product Categories** list; click **Clear** to remove your selection.

   Description. Enter a brief description of the category.

   Order. Enter a number to specify the order in which this category will appear in the Product Category drop-down list.
4. To create the category, click **Save**.
5. To create another category, click **Save** and **Create New**.

To manage product categories

1. To view the details of a category, click its name in the **Product Category List**.

   Sugar displays the category's details in the Product Category sub-panel.
2. To edit the details, revise the information in the Product Category fields and click **Save**.
3. To delete a product category, click the **del** icon corresponding to the name in the **Product Categories List;** click **OK** to confirm the deletion.
4. To import product category data, on the Products tab, click **Import Product Categories**, and follow the process described in Importing Data.

To create a manufacturer

1. On the Admin Home page, select **Manufacturers** in the **Products and Quotes** sub-panel. Alternatively, select **Manufacturers** from the Product Catalog, Product Categories, or Product Types tabs.
2. On the Manufacturers Home page, click **Create**.

   Sugar displays the **Manufacturer** sub-panel.
3. Enter information for the following fields:

   Manufacturer. Enter the manufacturer's name.

   Status. From the drop-down list, select **Active** to add the name to the Manufacturers drop-down list.

   Order. Enter a number to specify the order in which the name displays in the drop-down list.
4. To create the manufacturer, click **Save**.
5. To create another manufacturer, click **Save** and **Create New**.

To manage manufacturers

1. To view the details of a manufacturer, click the name in the **Manufacturer List**.

   The Manufacturer sub-panel displays the manufacturer information.
2. To edit the details, click **Edit**, revise the information, and click **Save**.
3. To delete a manufacturer from the list, click the **del** icon corresponding to the name in the Manufacturer List; click **OK** to confirm the deletion.

To create a shipping provider

1. On the **Admin Home** page, click **Shipping Providers** in the **Products and Quotes** sub-panel.
2. On the **Shipping Provider Home** page, click **Create**.
3. In the **Shipping Provider** sub-panel that displays below the list, enter information for the following fields:

   Shipping Provider. Enter the name of the provider.

   Status. From the drop-down list, select **Active** to display the name in the Shipping Provider drop-down list.

   Order. Enter a number to specify the order in which the name is displayed in the drop-down list.
4. To create the provider, click **Save**.
5. To create another provider, click **Save and Create New**.

To manage shipping providers

1. To view the details of a provider, click the name in the **Shipping Provider List**.

   Sugar displays the provider's details in the **Shipping Provider** sub-panel.
2. To edit the details, revise the information, and click **Save**.

3. To delete a provider from the list, click the **del** icon corresponding to the name in the **Shipping Provider List**; click **OK**.

To create tax rates

1. On the Administration Home page, click **Tax Rates** in the **Products and Quotes** sub-panel.
2. On the **Tax Rate** page, click **Create**.
3. In the **Tax Rate** sub-panel that displays below the list, enter information for the following fields:

   Tax Rate Name. Enter a name for the tax rate.

   Percentage. Enter the tax percentage.

   Status. From the drop-down list, select **Active** to display the name in the **Tax Rate** drop-down list.

   Order. Enter a number to specify the order in which the tax rate is displayed in the drop-down list.
4. To create the tax rate, click **Save**.
5. To create another rate, click **Save and Create New**.

To manage tax rates

1. To view the details of a tax rate, click the name in the **Tax Rate** list.

   Sugar displays the rate details in the **Tax Rate** sub-panel.
2. To edit the details, revise the information, and click **Save**.
3. To import a list of tax rates as a .csv file, select **Import** from the Tax Rate tab. You can view the import file in Excel or save it to your local machine. For more information on importing data see Importing Data.
4. To delete a tax rate from the list, click the **del** icon corresponding to the name in the **Tax Rate** list; click **OK**.

Bug Tracker

This section provides the Releases option that enables you to maintain a list of releases for your product. This list will be available in the **Release** drop-down box that is displayed when reporting a new bug in the Bug Tracker module.

To create a release

1. On the **Administration Home** page, select **Releases** from the **Bug Tracker** sub-panel.
2. On the **Releases Home** page, click **Create**.
3. In the **Release** sub-panel that displays below the list, enter information for the following fields:

   Release Version. Enter the version number of the release.

Status. From the drop-down list, select **Active** to display the name in the Release drop-down list.

Order. Enter a number to specify the order in which the release is displayed in the drop-down list.

4. To add the release to the list, click **Save**.
5. To add another release to the list, click **Save and Create New**.

Forecasts

This section provides the Time Periods option that enables you to define time periods for the Forecasts module. These time periods display in the Time Periods drop-down list in the Forecasts Module.

You must define at least one time period to represent a fiscal year. Then you can choose to define quarters and months as time periods within a year, as needed. Time periods can overlap and can include times from other periods.

After you create a time period, you can create a schedule to run the forecast automatically for a specific user. Some schedules might need to include start dates for a quarter prior to when the quarter officially begins. When you create a forecast schedule for a user, you can select the **Cascade** checkbox if you want it to be available for all the user's direct and indirect reports as well as just the specified user.

To create a time period

1. On the **Admin Home** page, click **Time Periods** in the **Forecast** sub-panel.
2. On the **Time Periods Home** page, click **Create Time Period**.
3. Enter information for the following fields:

   Time Period. Enter a name for the time period; for example, Q1 2006.

   Start Date. Click the **Calendar** icon and select the start date of the time period.

   Is Fiscal Year? Select this box if the time period represents the fiscal year.

   End Date. Click the **Calendar** icon and select the end date for the time period.
4. To create the time period, click **Save**; click **Cancel** to exit the page without saving your changes.

   After you save the time period, the **Forecast Schedule** sub-panel displays on the time period’s detail page.

To manage time periods

1. To view details of a time period, click its name in the **Time Periods** list.
2. To export one or more time periods from the list to your local machine, select them in the **Time Period** list sub-panel, click the **Export** link, and follow the process described in Exporting Data.
3. To update or delete some or all the time periods, use the **Mass Update** sub-panel as described inEditing and Deleting Multiple Records.

4. To edit a time period, on the Detail View page, click **Edit**, revise the information, and click **Save**.
5. To duplicate a time period, on the detail page, click **Duplicate** and then click **Save**.
6. To delete a time period, on the detail page, click **Delete**.

To create a forecast schedule

1. In the **Forecast Schedule** sub-panel of the time period's detail page, click **Create**.
2. On the **Forecast Schedule** page, enter information for the following fields:

   Forecast Start Date. Click the **Calendar** icon and select the date to run the forecast.

   Schedule For. From the drop-down list, select the user for whom you are creating the forecast.

   Status. Select **Active** to run the forecast as scheduled; select **Inactive** to stop running the forecast.

   Cascade? Check this box if you want all the user's direct and indirect reports to receive the forecast as well.
3. To save the schedule, click **Save**; click **Cancel** to exit the page without saving your changes.

Contract Types

This section provides the Contract Type option that enables you to define contract types for the Contracts module. When a user creates a contract, the **Types** drop-down list displays the contract types for selection.

Because a contract can reference multiple documents such as Statements of Work and Non-Disclosure Agreements, you can associate one or more documents with a contract type. When users create a contract of a specific type, the associated documents display in the Documents sub-panel. Users can then edit and manage these documents as needed.

To create a contract type

1. On the **Admin Home** page, click **Contract Types** in the **Contracts** sub-panel.
2. On the **Contract Types** home page, click **Create**.
3. In the **Contract Type** sub-panel that displays at the bottom of the page, enter information for the following fields:

   Name. Enter a name for the contract type.

   List Order. Enter a number to specify the order in which the name is displayed in the **Types** drop-down list in the **Contracts** module.
4. To add the contract type to the list, click **Save**.
5. To add another contract type to the list, click **Save and Create New**.

   The new contract type now displays in the **Contract Types** list.

To manage Contract Type records

- To export one or more Contract Type records in.csv format, select them from the list and click **Export**. You can open the file in Excel or save it to your local machine.
- To delete one or more Contract Type records, select them from the list and click **Delete**.

To associate documents with a contract type

1. In the **Documents** sub-panel of the contract's detail page, click **Select** to display the **Documents List**.
2. Click one or more documents in the **Documents List** to select them.

   The selected documents along with details such as document type and revision number display in the **Documents** sub-panel on the **Contract Type** page. For templates, the **Template?** box is selected.
3. To edit the document, click the **Edit** icon corresponding to the document name.
4. To remove a document, click the **rem** icon corresponding to the document name.

Employee Records

As an administrator, you can create and manage employee records. When you create an employee record, it is automatically added to the Employees list as well as the Users list. Similarly, when you delete an employee, the associated user record is also deleted.

To create an employee record

1. Log into Sugar as an administrator.
2. Click the **Employees** link located at the top right-hand corner of the page.
3. From the **Actions** drop-down list on the **Employees** tab, select **Create Employee**.
4. On the **Employees** page, enter information for the following fields:

   First Name. Enter the employee's first name.

   Last Name. Enter the employee's last name.

   Picture. If you have downloaded the person's picture in .jpg or .png format on your local machine, click **Browse** to navigate to the location and upload the picture into the record.

   Employee Status. From the drop-down list, select one of the following status options:

      Active: Select this option to specify a current employee of your organization.

      Terminated: Select this option if the employee is no longer working for your organization.

      Leave of Absence: Select this option if the employee is going to be absent from work for an extended period of time.

   Title. Enter the employee's official title.

Department. Enter the name of the department to which the employee belongs.

Reports to. Enter the name of the employee's supervisor.

Office Phone. Enter the employee's office phone number.

Mobile. Enter the employee's cell phone number.

Other. Enter an alternative phone number for the employee, if any.

Fax. Enter the fax number for the employee.

Email. Enter the email address for the employee.

Home Phone. Enter the home phone number for the employee.

Other Email. Enter an alternative email address for the employee, if any.

IM Type. From the drop-down list, select the type of Instant Messenger service that the employee has.

IM Name. Enter the employee's user name for the IM service.

Notes. Enter any comments concerning the employee.

Primary Address. Enter the employee's primary address.

City. Enter the name of the city.

State. Enter the name of the State.

Postal Code. Enter the zip code of the address.

Country. Enter the name of the country.

5. Click **Save** to create the employee record; click **Cancel** to exit the page without saving your changes.

   You can now view the record in the Employees List View as well as the Users List View.

To manage employee records

- To edit an employee's record, open the record, and click **Edit**. Update the information as needed, and click **Save**.
- To delete an employee, open the record, and click **Delete**.
- To search for an employee, use the **Search** sub-panel located above the Employees list.
- To view an employee's details such as the title and contact information, click the employee name in the List View.
- To email an employee, click the user's email address in the List View.
- To export employee records, select them from the list, click **Export** and follow the process detailed in Exporting Data.
- To edit the status of multiple employees, use the **Mass Update** panel as described in Editing and Deleting Multiple Records.
- To duplicate a record, on the detail page, click **Duplicate**, modify the information if needed, and click **Save**. Duplication is a convenient way of creating a new

employee. You can change the information in the duplicate record to create the new employee.

- To go back to the **Employees Home** page from a detail page, select **Employees** from the **Actions** drop-down list on the module tab.

Knowledge Base Administration

Knowledge Base enables users to write articles on any subject for the benefit of other Sugar users. For more information on loading modules, see Module Loader. For more information on creating and managing articles, see Creating Articles.

Similar to other Sugar records, each article must have an assigned team and an assigned user. Only members of the assigned team can access and manage articles. .

Tagging Articles

Knowledge Base articles reside in the Sugar database. Users and administrators can use tags to group articles according to the subject or any other criteria. When you tag an article, the system creates a link between the article and the tag. You can apply multiple tags to an article. By default, the Knowledge Base module includes the FAQs root tag.

A tag can be of two types: root tags and sub-tags. A sub-tag is nested within a root tag. Both root tags and sub-tags can contain other sub-tags to further group articles into smaller categories.

The number of articles that a tag contains is displayed within parentheses next to the tag name. Select a tag to view a list of associated articles in the right panel. By pointing the cursor at the article's title or by clicking the title, you can view its contents.

For information on creating, editing, duplicating, emailing, and deleting articles, see Knowledge Base Module. Tagging, moving, and deleting articles are described later in this section.

Administrators can create, rename, and delete tags. Users can create tags during the process of creating or editing articles. However, they cannot rename or delete tags.

To create tags

1. On the **Knowledge Base** tab, select **Knowledge Base Admin**.

   Sugar displays the **Knowledge Base Admin** page on the screen. This page displays existing tags. By default, the **Knowledge Base** module includes the FAQs root tag. The number of articles that a tag contains is displayed within parentheses.

2. To create a new tag, from the **Admin Actions** drop-down list, select **Create New Tag**.

3. To create a new root tag, select **Tags** and enter the tag name in the adjoining text field.

   To create a sub-tag, select an existing tag and enter the tag name in the text field.

4. Click **Save** to create the tag.

   Sugar displays the new root tag below the **Tags** folder. A new sub-tag displays within the parent tag.

To tag articles

1. Select **Apply Tag to Articles** from the **Admin Actions** drop-down list, and select the tag that contains the articles from the **Tags** list below.

   The system displays the articles in the right panel.
2. Select the articles from the list and click **Select Tags**.

   The existing tags display in a separate window.
3. Select the tag that you want to associate with the article and click **Apply Tags**.
4. The article is copied from the previous tag to the new tag.

To rename a tag

1. Select **Rename Tag** from the **Admin Actions** drop-down list and select the tag from the **Tags** list below

   Sugar displays the current tag name and a text field to enter the new name next to the drop-down list.
2. Enter the tag's new name and click **Save**.

   The system changes the tag name.

To delete a tag

1. Ensure that the tag is empty. You can move or delete articles within the tag.
2. Select **Delete Tag** from the **Admin Actions** drop-down list, and select the tag from the **Tags** list below.
3. Click **Delete Tag**.

Managing Articles

You can delete outdated articles that have passed their expiration date. If you want to delete a tag, you will need to first either delete or move the articles that it contains. Deleting an article from a tag removes the association between them. However, the article still exists in the Sugar database and associations with other tags, if any, remain unchanged.

To move articles from a tag

1. Select **Move Selected Articles** from the **Admin Actions** drop-down list and select the tag that contains the articles from the **Tags** list below.

   Sugar displays the articles in the right panel.
2. Select the articles from the list and click **Select Tags**.

   Sugar displays the existing tags in a separate window.
3. Select the tag that you want associated with the article and click **Move**.

Sugar moves the article into the new tag from the previous tag. If the article already existed in the new tag, the system overwrites it.

To delete articles from a tag

1. Select **Delete Selected Articles** from the **Admin Actions** drop-down list and select the tag that contains the articles from the **Tags** list below.

   The system displays the articles in the right panel.

2. Select the articles from the list and click **Delete**.

   The system deletes the article from the tag.

Enabling Full Text Search

In order to use Knowledge Base, your database must have the capability to perform a full text search. MySQL provide this feature, but if you are using Microsoft SQL Server, you need to perform additional steps as detailed below:

1. If you have installed SQL Server 2005 Express Edition, then you must upgrade to SQL Server 2005 Express Edition with Advanced Services, available at:

   http://msdn.microsoft.com/vstudio/express/sql/download

2. When installing SQL Server 2005 Express Edition with Advanced Services, do not accept all defaults because the default setting for full text indexing is **Do not install**.
3. After installing the Microsoft SQL Server Express/Enterprise edition, ensure that full text indexing service is turned on. You can verify this in the Services Panel. You can access the Services Panel from the Control Panel.

Advanced Configuration Options

The advanced configuration options listed below enable you to exercise tighter control over user actions in your Sugar instances.

Locking Down Upgrade Wizard, Module Builder, and Backups

If you are managing multiple instances of the Sugar application, you can maintain complete control over the Sugar instances by preventing users with administrative privileges from making any changes. To do this, you can lock down the Upgrade Wizard, Module Builder, and Backups.

To lock down the Upgrade Wizard, Module Builder, and Backups

1. Navigate to the **config.php** file in the Sugar root directory.
2. Set the following parameter as shown below:

   ```
   $sugar_config['admin_access_control']=true
   ```

3. Save the file.

Restricting the Module Loader

To ensure that users with administrative privileges do not load sub-standard modules into Sugar, you can restrict the Module Loader to a specific directory that you control. This allows you to check modules before they are loaded into Sugar.

To restrict the Module Loader

1. Navigate to the **config.php** file in the Sugar root directory.
2. Set the following parameters as shown below:

   `$use_common_ml_dir=true`

   `$common_ml_dir=`***`'ml directory'`***

   where ***`ml directory`*** is the name of the directory from which module will be loaded into Sugar.
3. Save the file.

Limiting System Resources

By default, Sugar terminates any request or post that runs more than 1000 queries. For reports, export, import, administration, and synchronization, the maximum number of queries allowed is 50,000 per request. This prevents user-initiated processes from taking up too many system resources. You can change these settings as desired in the **config.php** file.

Configuring Default Permissions for Sugar Files on Linux

If you are running Sugar on Linux platform, you can control ownership and accessibility to all Sugar files and folders by configuring default user and group permissions.

The following is an example of setting Read, Write, and Execute permissions for the Apache user and the Apache group on Centos operating system:

```
'default_permissions' => array(
'dir_mode' => 02770,
'file_mode' => 0660,
'chown' => 'apache',
'chgrp' => 'apache',),
```

For `dir_mode`, you may see a value of 1528, which is the decimal equivalent of the octal value 02770. For `file_mode` you may see a value of 432 which is the decimal equivalent of octal value 0660.

Sharing Calendar Information in Microsoft Outlook

You can specify settings in Outlook so that the free/busy information from the Outlook calendar for a user is shared with the user's Calendar in Sugar. The settings must be configured on each user's computer.

Follow the steps listed below in Microsoft Outlook:

1. Select **Tools > Options**. Then click **Calendar Options**.
2. Click **Free/Busy Options**.
3. Select the **Publish at my location** checkbox, and enter the path for the Sugar email account information following the syntax:

   http://serviceman/sugarcrm/vcal_server.php/type=vfb&source=outlook&email=

   myemail@servername.com

   where *myemail@servername* is the email address specified under **Email Options** in the user's **User Preferences** page in Sugar. On the **User Settings** page in the Calendar Options, the URL for publishing free/busy information is displayed in **Your Publish URL**.
4. For Search location enter the path for the Outlook account information, such as:

   http://servername/sugarcrm/vcal_server.php/
   type=vfb&source=outlook&email=%NAME%@%SERVER%

   where *%NAME% and %SERVER%* are Outlook replacement variables to construct the email address.

Index

K

L

M

N

O

P

Q

R

S

V

W