# Sugar Enterprise 7.6 Application Guide

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# Sugar Enterprise 7.6 Application Guide

The Sugar Application Guide introduces you to some basic CRM concepts and helps you get familiar with the Sugar system. It describes how to access Sugar 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 Chrome.

Last Modified: 01/18/2016 02:25pm

# Introduction

## Overview

Welcome to Sugar - a commercial, open source Customer Relationship Management (CRM) application. Strong relationships are at the core of every organization's success. Sugar brings ease and order to the creation, development, and maintenance of your organization's important relationships.

Sugar consists of interrelated records in modules such as Accounts, Contacts, Opportunities, Cases, Meetings, Emails, etc. and wraps your data in an intuitive user interface which helps make sense of these different elements of your business. Whatever your organization's focus - sales, marketing, support, or other ventures - Sugar's flexible modules bend to align with your business' models and practices. Manage your relationships from inception to fruition and beyond with Sugar's built-in modules and relationships as well as your custom modules and configurations available to Sugar administrators.

## Core Features

### Sales Force Automation

- Target, Lead, and Contact management to direct and organize efforts throughout the sales lifecycle
- Account management to aggregate interactions with organizations and individuals
- Opportunity management to pursue new business, share sales information,

and track deal progress
- Sales Forecasting to enable sales representatives and managers to understand upcoming business
- Quote management to prepare potential sale figures including multiple line items, currencies, and tax codes
- Quoted Line Item management to capture the details of your organization's goods and services

## Marketing Automation

- Target, Lead, and Contact management to support the creation of new relationships
- Email marketing campaigns to present relevant email messages to groups of recipients
- Campaign management and reporting for tracking campaigns across multiple channels and analyzing the effectiveness of marketing activities
- Target List management to organize groups of recipients for ensuring campaign message relevance
- Web-to-Lead Forms to capture lead information directly from external web input

## Customer Support

- Case management to track service and resolution of customer issues
- Bug tracking to identify, prioritize, and resolve product issues
- Contact and Account management to track support history and enable continuity of service
- Sugar Portal to provide clients with self-service capabilities support activities
- Knowledge Base to manage information and share it externally

## Record Keeping

- Email, Task, Call, and Meeting management to facilitate day-to-day work
- Note management to affix information and file attachments to other Sugar modules
- Document management to track living documents and their changes
- Contract management to capture and maintain sales and service contracts
- Search capabilities to quickly and easily locate your data

## Collaboration

- Shared Email and Calendar to provide visibility across individuals and teams
- Connectors and tools to leverage third-party information regarding your prospects and clients

### Reporting

- Report creation and management to gain insight into your organization's Sugar data
- Home page dashlets to display important tables and reports

Last Modified: 09/26/2015 05:23pm

# Getting Started

## Overview

Sugar offers users a wide range of configuration options when getting started with the application. Your first time logging into Sugar the New User Wizard will step through configuring some basic settings (i.e. Your Information, Your Locale, etc.). You may skip these steps and configure these settings in your user preferences at a later time. Please note that system administrators can also set up each user's basic settings when creating the user in Sugar. This documentation will cover the various options (e.g. New User Wizard, User Preferences, etc.) available when first getting started with Sugar and accessing your account.

## Accessing Sugar

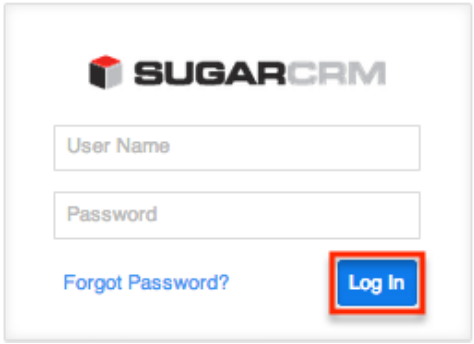
### Prerequisites

The following will need to be installed and configured on your local machine prior to accessing Sugar:

- A supported web browser application (e.g. Chrome, Firefox, etc.) is required on your local machine. For more information on the various supported web browsers, please refer to the Supported Platforms page.
- The web browser must have JavaScript and cookie support enabled in order to access Sugar.
- Network access to a server running your Sugar instance is required.

## Logging In

The Sugar login screen allows you to enter login credentials (user name and password) to access your instance. Navigate your web browser to your instance's URL (e.g. https://example.sugarondemand.com) to access Sugar's login screen. If you do not know your instance URL or login credentials, please reach out to your system administrator for assistance. The New User Wizard will launch upon your first successful log in to Sugar allowing you to configure some of your basic personal settings.

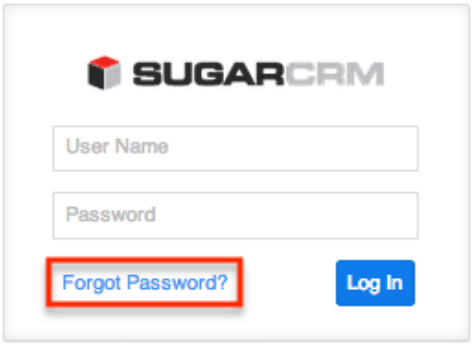



## Resetting Your Password

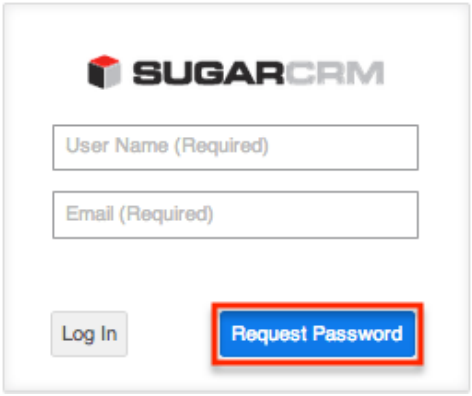
There may be occasions when users forget their Sugar password and will need to reset it. If the system administrator has enabled the Forgot Password feature via Admin > Password Management, users will have the option to request a password reset directly from Sugar's login screen. If you do not see the Forgot Password link on your login screen, please reach out to your system administrator for further assistance. System administrators can either enable the Forgot Password feature, send a system-generated password to the user, or manually change the user's password via Admin > User Management. For more information on how to set up and manage passwords in Sugar, please refer to the Password Management documentation. Please note that the outbound mail server for the system must be configured via Admin > Email Settings and users will also need to have their personal email settings configured in their user preferences in order for the temporary password information to be emailed.For more information on setting up the system email settings, please refer to the Email documentation in the Administration guide.

Use the following steps to request a new password:

1. Click the Forgot Password? link on the bottom left of Sugar's login dialog box.




2. Enter your Sugar username and primary email address on file, then click "Request Password". If submitted successfully, a message will appear that your request has been submitted.

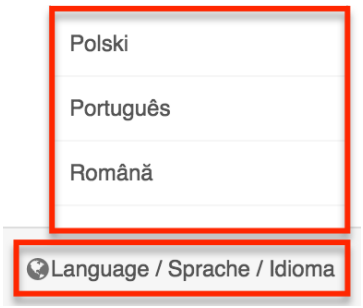



3. A temporary password will be emailed to your primary email address.
4. Enter the temporary password into Sugar's log in screen.
   Note: Be sure to change your password once logged in by navigating to the Password tab in your user preferences.

## Setting Your Language

Users have the option to choose the primary language they want displayed in Sugar by clicking the Language icon on the bottom right of the Login screen. The Language dropdown list will appear allowing you to select the appropriate language you want displayed in your Sugar account. The out-of-the-box default language is English (US), but administrators can change the default language globally via Admin > Locale. For more information on configuring the default language in Sugar, please refer to the User Interface section of the System documentation. Once the default language is changed by the administrator, it will display as the default selection on the login screen for all users.

Administrators can also control what languages are available to select in the Language dropdown list via Admin > Languages. If you do not see one of the listed languages below displayed in the Language dropdown list, please reach out to your system administrator for assistance. For more information on managing languages in Sugar, please refer to the Languages section of the System documentation.

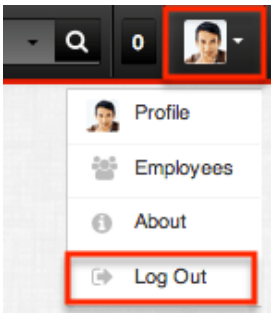



The following languages are available for use in Sugar:

| | |
|---|---|
| Albanian | Italian |
| Arabic | Japanese |
| Brazilian Portuguese | Korean |
| Bulgarian | Latvian |
| Catalan | Lithuanian |
| Chinese | Norwegian |
| Czech | Polish |
| Danish | Portuguese |
| Dutch | Romanian |
| English (UK) | Russian |
| English (US) | Serbian |
| Estonian | Slovak |
| Finnish | Spanish |
| French | Spanish (Latin) |
| German | Swedish |
| Greek | Turkish |
| Hebrew | Ukrainian |
| Hungarian | |

## Logging Out

When you are done working in Sugar and wish to log out of the system, simply click your user name on the upper right of Sugar and select "Log Out". This will log you out completely from Sugar and you must log in again in order to access your account.




Automatic Log Outs

While working in Sugar, a user may be automatically logged out of the system. Currently, Sugar allows a username to be logged in under only one session, and any additional user sessions started using the same username will log out the previous session. This behavior is for your security as Sugar does not allow multiple sessions for the same username from different machines or browsers. To prevent situations like this, please do not share your login credentials (username and password) with users in your organization.

Another situation where users are automatically logged out is when the user does not perform any actions in Sugar for a certain period of time. The security timeout period in Sugar is controlled by configuration settings in PHP and the web server running your Sugar instance. Please note that the PHP session's lifetime persists until you close your web browser and the default session timeout value is 1440 seconds (24 minutes).

In order to prevent security timeouts, users can navigate or click the page(s) in Sugar every so often to keep the session active. If the session times out, click any button, tab, etc. on the current page once you are ready to continue working in Sugar, and you will be taken back to the Login screen. Another option is to completely close your current browser and open a new browser to navigate back to Sugar's Login page.

Please note that users can have multiple tabs of Sugar pages open within the same web browser (e.g. Chrome) without getting logged out of the system. For example, this is useful when working with multiple Sugar pages or records without navigating away from previous pages.

## New User Wizard

When users first log in to Sugar, they will step through the New User Wizard to configure some basic settings (i.e. Your Information, Your Locale, etc.). If the system administrator already configured your basic settings when adding you as a

user to Sugar, the fields in the wizard will be populated with the provided information. You can update your information as you go through the New User Wizard to make any necessary changes. Please note that you can skip the steps in the wizard if you wish to configure the settings via your user preferences at a later time.

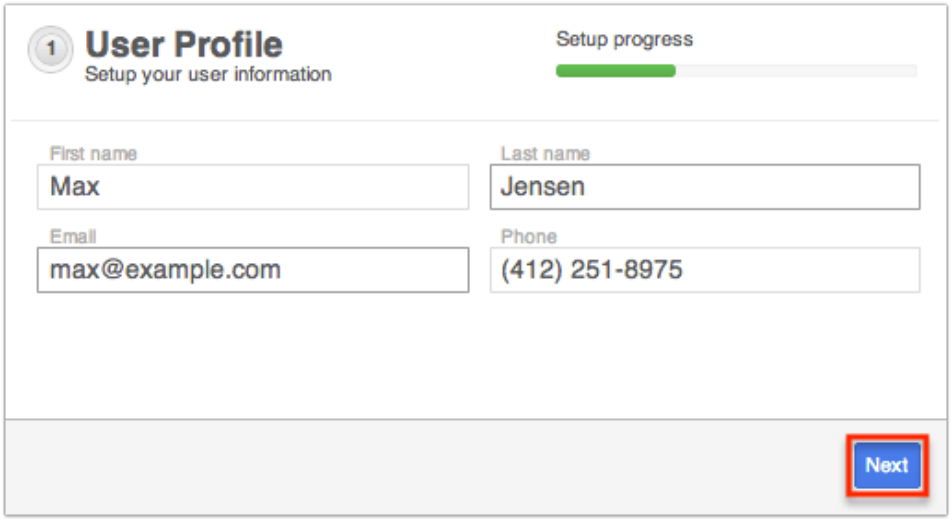
## Configuring Your Information

The Your Information step of the New User Wizard allows you to enter basic information (e.g. name, email address, phone) about yourself to be stored in your user profile. Please note that the information provided on this step can be updated in your user preferences at a later time if desired. For more information on configuring your personal information, please refer to the User Preferences section of this documentation.

The following options are available to configure your user profile:

- First Name : Enter your first name.
- Last Name : Enter your last name.
- Email : Enter your primary email address.
- Phone : Enter your office number.

Please note that all required fields will indicate "Required" in the field and must be completed prior to moving to the next step of the wizard. Once your personal information is entered, click "Next".




## Configuring Your Locale

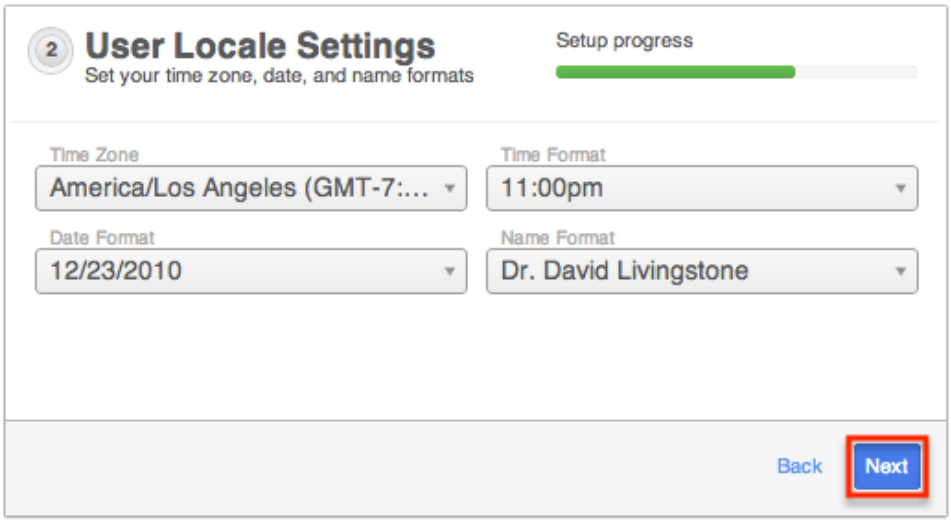
The User Locale Settings step allows you to configure the date, time, and name

format you want Sugar to display based on your current geographical location. Please note that the information provided on this page can be updated in your user preferences at a later time if desired.

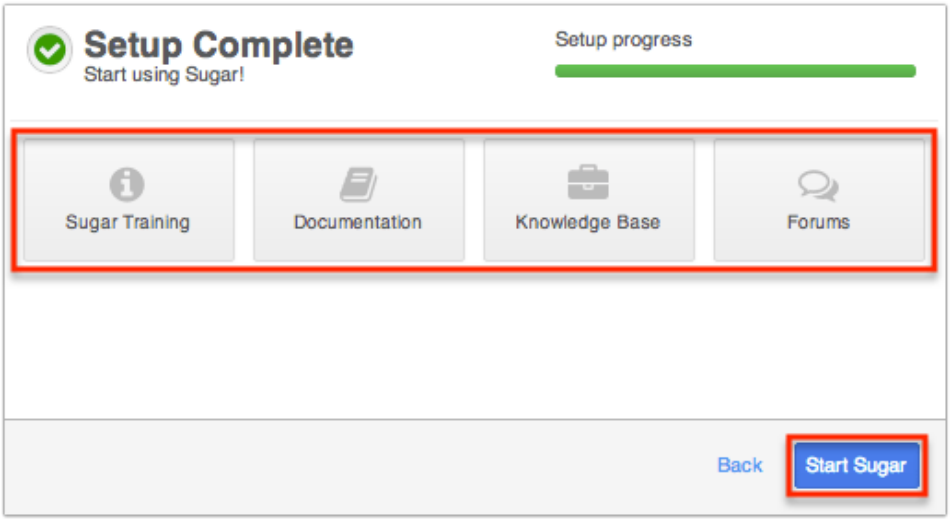
The following options are available to configure your locale settings:

- Time Zone : Select the time zone based on your current geographical location.
- Date Format : Select the format you want the date stamps displayed in Sugar.
- Time Format : Select the format you want the time stamps displayed in Sugar.
- Name Format : Select the format you want the concatenated name fields displayed in Sugar's list view and record view.

Once your locale information is entered, click "Next".

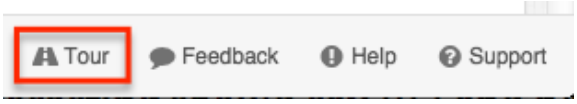



The following page will confirm that your set up is complete and that you are ready to use Sugar. You can access the various support resources (e.g. Documentation, Knowledge Base, etc.) available by clicking one of the boxes in the dialog box. Please note that you can click "Start Sugar" to go directly into your Sugar account.



## Tour

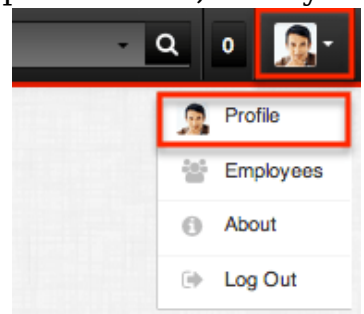
Upon your first log into Sugar, the Welcome to Sugar tour will launch on the Home page to show you key features of the user interface. The Welcome to Sugar window includes links which provide access to additional resources (e.g. training, documentation, etc.). Click the appropriate link or icon to be directed to the specific page in a separate tab. To begin the tour, simply click the Right arrow and a bubble will appear to point out the various parts of the application such as where to access the dashboard and activity stream, perform a global search, etc. You can click the Left arrow at anytime during the tour to go back through the key features again. Once you have completed viewing the tour, click the Done button to exit the tour. The tour will not automatically launch again for any subsequent logins as long as you click the Done button to close the tour. Please note that you can click the Tour icon in Sugar's footer at any time to launch the tour again. For more information regarding the Tour icon, please refer to the User Interface documentation. As you navigate around Sugar, you can launch the tour for any of the Sidecar modules (e.g. Accounts, Leads, Contacts, etc.) by clicking the Tour icon to view key features for the list view and record view.




Note: The tour will launch again upon logging into Sugar following the upgrade of your instance.

## User Preferences

There is a wide range of configuration options available to users when setting up their profile in Sugar. The User Preferences section gives users the ability to view and update their basic information, personal email settings, etc. To access user preferences, click your user name on the upper right of Sugar and select "Profile".



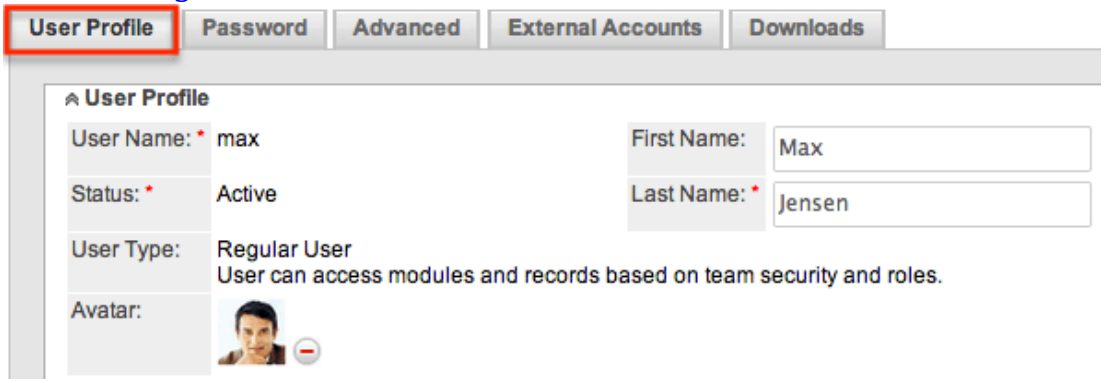

### User Profile Tab

The User Profile tab displays basic information such as your name, email address,

phone number, etc. If the New User Wizard was completed, the information you entered will appear under the User Profile tab. The system administrator can also enter the user's basic information when creating the user via Admin > User Management. For more information on creating new users, please refer to the User Management documentation. Your personal information on this tab is grouped by default into the User Profile, Employee Information, and Email Settings sections. To enter or update your information, simply enter the appropriate values for the fields then click "Save" to preserve the changes.

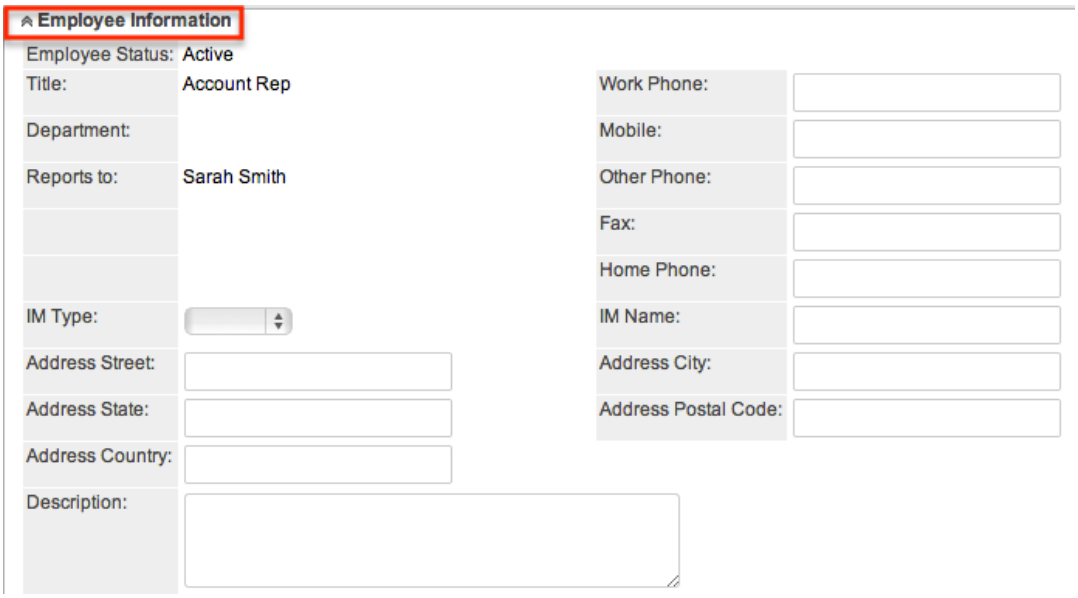
## User Profile

The User Profile section displays your Sugar user name, full name, status, user type (e.g. Regular User, System Administrator User), and profile picture (if uploaded). Your user name, full name, status, and user type will be populated as the system administrator must enter this information when creating a new user. Users have the option to update their user name, full name, as well as upload a profile picture to be displayed in the upper right of Sugar. Please note that only system administrators have the ability to change your status and user type. For more information on changing a user's status and user type, please refer to the User Management documentation.




## Employee Information

The Employee Information section displays your employee status, title, phone number, address, etc. If you completed the Your Information step of the New User Wizard, the information you entered will appear in this section. You can update your address, phone number (e.g. Work Phone, Mobile, etc.), description, IM Type (e.g. MSN, Yahoo!, etc.), and IM Name in this section accordingly. Please note that only system administrators can change your employee status, title, department, and supervisor information. For more information on administrator updates to the Employee Information section, please refer to the User Management documentation.




Email Settings

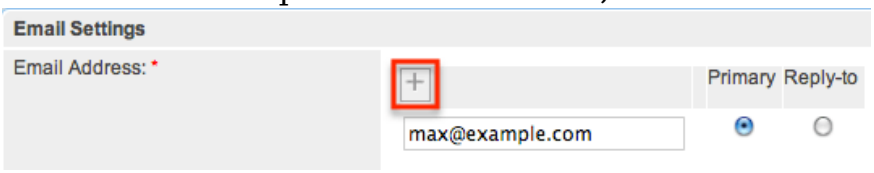
The Email Settings section is where users can configure their personal email settings. Administrators can also set up the users email setting when adding the user in the system. Please note that the email setting must be configured in user preferences prior to sending outbound emails from Sugar. In addition, the outbound mail server for the system must also be configured by the system administrator via Admin > Email Settings. For more information on setting up the system email settings, please refer to the Email documentation in the Administration guide.

Users will enter their primary email address where password reset emails, system-generated notifications, etc. will be sent. Multiple email addresses can be added in email settings, but only one will be marked "Primary". The primary email address will be displayed when sending outbound emails in Sugar and automatic notifications from Sugar will be sent to this address as well. Users will be able to send outbound emails automatically from Sugar if the administrator has enabled users to use the system mail account configured in Admin > Email Settings. If this option is not enabled, the SMTP Username and Password fields will appear in the Email Settings section for the user to enter their personal credentials corresponding to their mail account on the company's defined mail server. The user will need to enter these credentials in order to send emails using the system's outbound mail server.

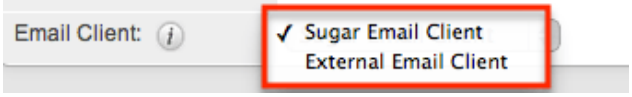
By default, outbound emails will be sent using the email client set up within the Sugar application. However, users have the option to use an external mail client if they would like to use an email client (e.g. Microsoft Outlook) outside of the application .

Use the following steps to configure your personal email settings in user preferences:

1. Enter in the primary email address in the Email Address field.
    - To add multiple email addresses, click the Plus button.



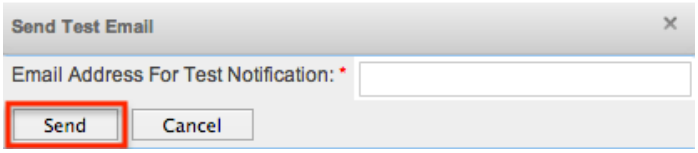

2. The email client will be defaulted to "Sugar Email Client", but users can choose to use an external mail client if they wish.




3. Enter in the SMTP Username and Password for your mail account on the company's defined mail server.
    - Note: The SMTP Username and Password field will only appear if the system administrator has not allowed users to use the system mail account to send outbound emails.




4. Click "Send Test Email" and enter in an email address to send the test email.
    - If you do not receive the test email, double check and re-enter the email account information to test again.

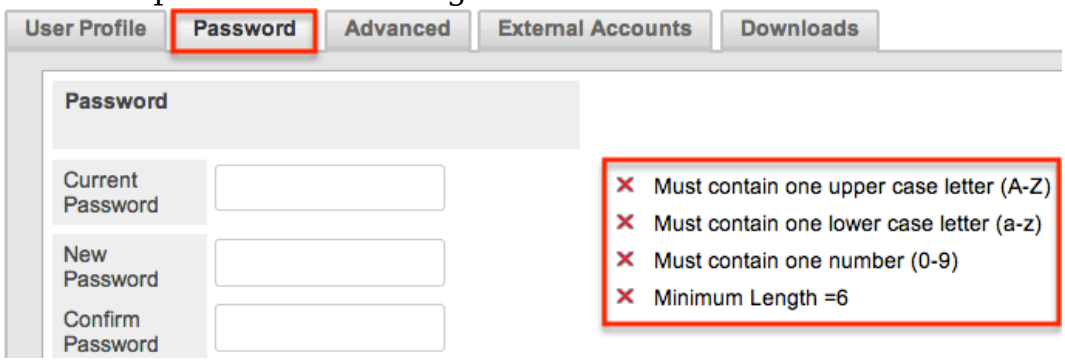



5. Click "Save" to preserve your email settings.

## Password Tab

Users have the option to change their password in Sugar by navigating to the Password tab in their user preferences. You can use this option to change temporary Sugar passwords, system-generated passwords for password resets, etc. Administrators also have the ability to change or reset a user's password via Admin > User Management. For more information on how administrators can reset a user's password, please refer to the Resetting User Passwords section of the User Management documentation. Please note that passwords can be changed as often as you wish in Sugar. Updating passwords in Sugar on a regular basis is recommended for the security of your account.

To reset your password, enter your current password, new password, and confirmed password making sure to meet the password requirements listed on the right. Each password requirement will be checked off in the list as the new password meets the required conditions. Please note that the new password you enter must meet all the restrictions in order for the password to save. System administrators can configure the password requirements via Admin > Password Management. They can choose the minimum and maximum lengths required for the password, as well as indicate if any special characters are needed. Additional requirements such as upper case, lower case letters, and numbers can also be part of the set restriction. The password requirement set by the system administrator determines what users will need to include when creating new passwords. Although not recommended, administrators can choose to not set password requirements if they wish, which will allow users to change their passwords without any restrictions. For more information on configuring password requirements, please refer to the Password Requirements section of the Password Management documentation. Once you have entered the new password, click "Save" to preserve the change.




## Advanced Tab

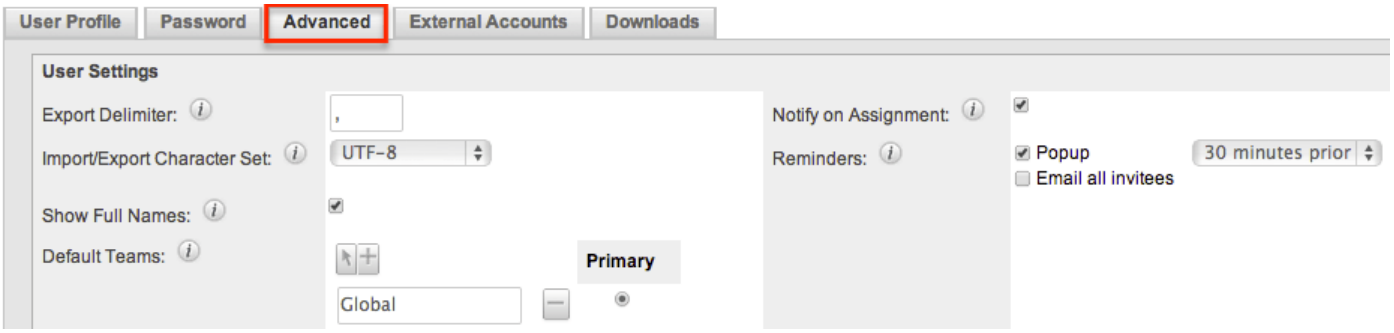
The Advanced tab shows information specific to the user's preferences in Sugar. This information includes user settings, locale settings, PDF settings, calendar options, and layout options. Users can set up, view, or change the information under this tab based on their geographical location and personal preference.

### User Settings

The User Settings section allows you to configure various settings for your account such as default team(s), reminders, notify on assignment, etc. The system administrator can configure these settings for you when adding you as a user in Sugar, but you can change these settings accordingly based on your personal needs and preference.

The options available to configure in the User Settings section are as follows:

- Export Delimiter : Specify the character used to delimit exported data from Sugar. By default, the comma is used to separate exported data in Sugar.
- Import/Export Character Set : Select the default character set used for data import, data export, and vCard generation. By default, UTF-8 (US or Western Europe region) is selected as the import/export character set.
    - Please be sure to select the proper character set based on your locale setting in Sugar. This will make sure that the character set between Sugar and your local machine matches when you export data, import data, or generate PDFs.
- Show Full Names : Check this box if you would like your full name (e.g. John Smith) instead of your assigned user name (e.g. jsmith) displayed in Sugar. If enabled, your full name will appear in the My Activity Stream dashlet, Assigned to fields, and on the upper right of your Sugar account.
- Default Teams : Select the default team(s) that will be automatically assigned to new records you create in Sugar.
- Notify on Assignment : Check this box to receive an email notification when a record is assigned to you by another user. Both the outbound mail server and
- Reminders : Mark the popup or email reminder checkbox to set default reminders for calls and meetings. Once marked, you can select the default reminder time (e.g. 10 minutes prior) to send reminders to invitees.

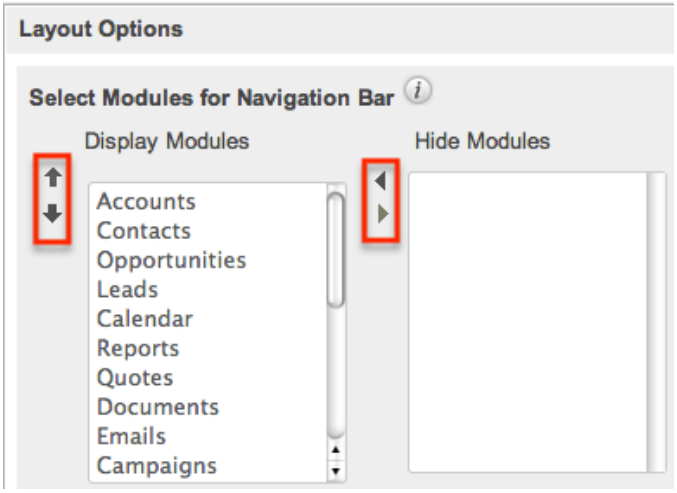



Layout Options

The Layout Options section allows users to select what modules they want Sugar to display or hide in the navigation bar.

The options available to configure in the Layout Options section are as follows:

- Select Modules for Navigation Bar : Select which modules will be displayed or hidden in the navigation bar by using the left and right arrow to move modules between the Display and Hide Modules column. You can also designate the order of the modules displayed in the navigation bar by selecting the module in the Display Modules column and clicking the up and down arrow.



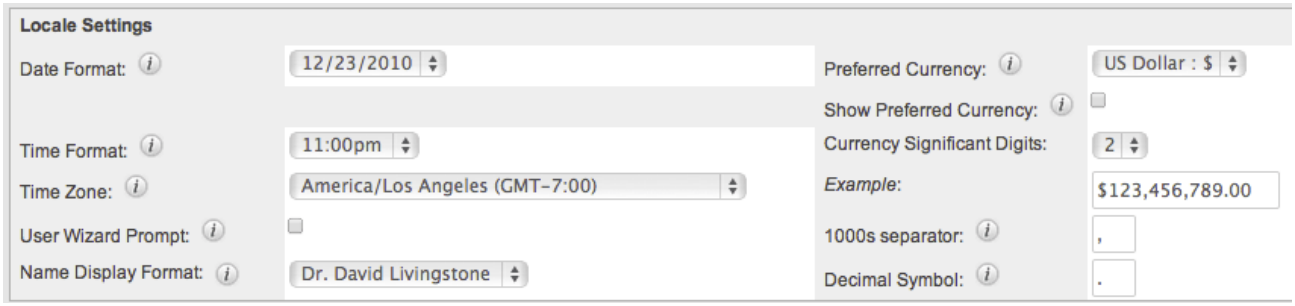

Locale Settings

The Locale Settings section is where you can specify how you would like the data in Sugar displayed based on your geographical location. Please note that system administrators can set the system locale settings via Admin > Locale, which will be the default setting for all users in Sugar. But each user has the option to change the default locale settings for their Sugar account in their user preferences.

The options available to configure in the Locale Settings section are as follows:

- Date Format : Select the format you want the date stamps displayed in Sugar.
- Time Format : Select the format you want the time stamps displayed in Sugar.
- Time Zone : Select the time zone based on your current geographical location.
    - Please note that if the selected time zone is different from your browser's set time zone, a warning message ("Your browser's timezone does not match your saved timezone Adjust Your Timezone.") will appear upon your next log into Sugar. You can click the link in the warning dialog box to change the time zone in your user preference accordingly.
    - Note: This Time Zone setting only applies to modules using the Legacy user interface. Modules using the Sidecar user interface will utilize the browser's time zone.
- User Wizard Prompt : Mark the checkbox to have new users go through the New User Wizard upon first login.
- Name Display Format : Select the format you want the concatenated name fields displayed in Sugar's list view and record view.
- Preferred Currency : Select the default currency you want Sugar to display.
- Show Preferred Currency : Mark the checkbox to convert the base currency to user-preferred currency in list views and record views.
- System Significant Digits : Select how many digits will appear after the decimal symbol for currencies.

- 1000s Separator : Enter the default character used to separate numeric values in the thousands.
- Decimal Symbol : Enter the default character used as the decimal symbol.




PDF Settings

The PDF Settings section allows users to set and change the default font settings for PDF documents generated in Sugar.

The options available to configure in the PDF Settings section are as follows:

- Font for Header and Body : Select the font for the header and body of PDF documents when generated in Sugar.
- Main Font Size : Enter the default font size for the PDF header when generated in Sugar.
- Font for Footer : Select the font for the footer of the PDF document when generated in Sugar.
- Data Font Size : Enter the default font size for the PDF body when generated in Sugar.




Calendar Options

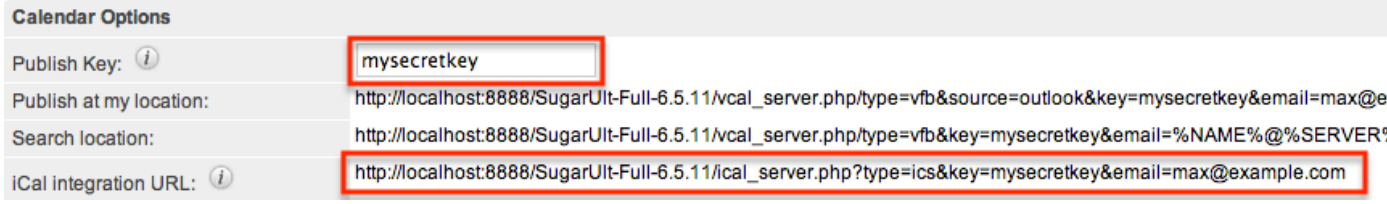
Sugar calendars can be shared and viewed with various iCal compatible calendar applications such as Apple Calendar, Google Calendar, Yahoo! Calendar, Mozilla Thunderbird, etc. The calendars are viewable as read-only in the external calendar applications and any edits to existing calendar events (e.g. meetings, calls, etc.) can only be done in Sugar. The Calendar Options section allows users to generate

a unique publish key to sync their Sugar calendar to external calendar application(s). The publish key is a security feature as it prevents other users from viewing your calendar unless they have this information. The user must have your publish key information in order to view your Sugar calendar via the external calendar application.

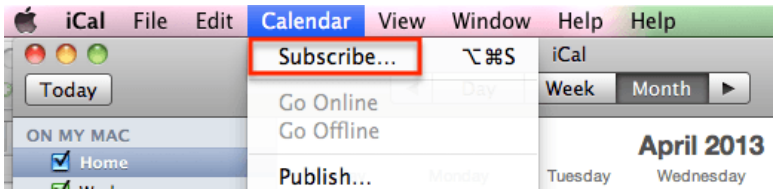
- Publish Key : The publish key is used to uniquely identify a user's calendar and sync Sugar's calendar to external calendar applications (e.g. Google Calendar, Apple Calendar, etc.). A system-generated alphanumeric value (e.g. 948fc65a-9c89-a11f-b40c-5) is displayed by default, but users can change this key (e.g. mysecretkey) to whatever they wish. The Publish at my location site, Search location, and iCal integration URL all reflect the publish key within the URL.
- Publish at my location : Use this URL to sync free/busy information for meetings from Microsoft Outlook to Sugar. This is helpful when scheduling meetings in Sugar as you can view the user's free/busy information to avoid scheduling conflicts.
- Search location : Use this URL to sync free/busy information for meetings from Microsoft Outlook to Sugar. This is helpful when scheduling meetings in Sugar as you can view the user's free/busy information to avoid scheduling conflicts.
- iCal integration URL : Use this URL to integrate the external calendar application with your Sugar calendar.
- First Day of Week : Select the first day of the week that will display in Week, Month, and Year views when viewing your Sugar calendar. This setting also applies to calendar pickers which display when users are setting a value for a date field (e.g. Expected Close Date).

Use the following steps to integrate the external calendar application with your Sugar calendar:

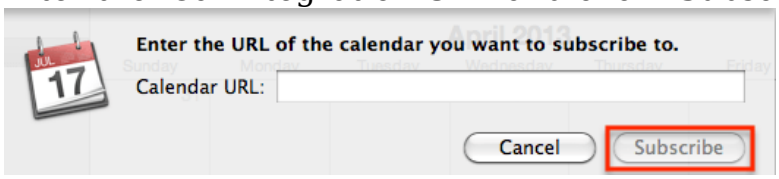
1. Navigate to the Advanced tab in your user preferences and scroll to the Calendar Options section.
2. Enter a new publish key (e.g. mysecretkey) and Sugar will automatically generate the iCal integration URL.



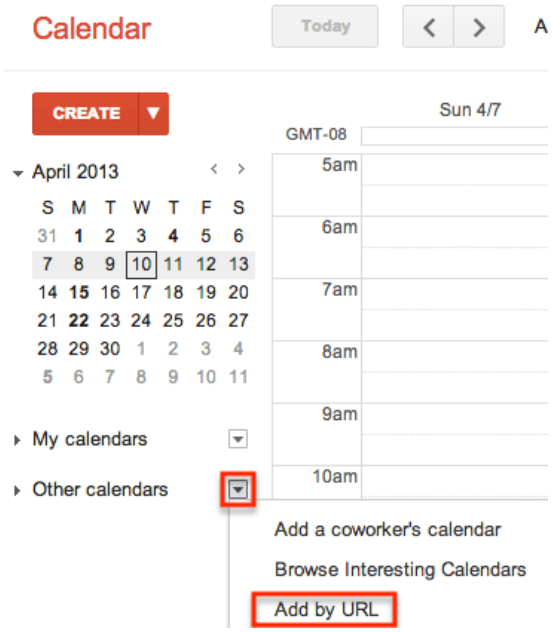

3. Copy and paste the iCal integration URL into your iCal compatible calendar application.
    - Example: Adding the URL into Apple Calendar.
        1. Click "Calendar" then select "Subscribe".



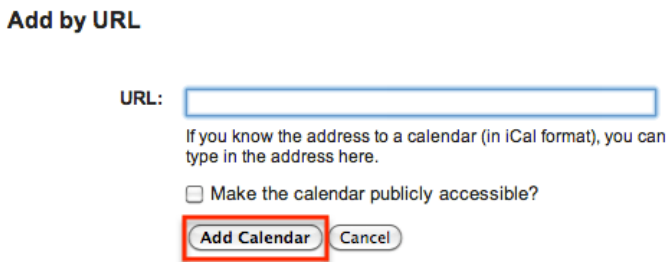

2. Enter the iCal integration URL and click "Subscribe".




- Example: Adding the URL into Google Calendar ( https://www.google.com/calendar).
  1. Click "Other Calendars" then select "Add by URL".




  2. Enter the iCal integration URL and click "Add Calendar".




Use the following steps to sync the free/busy information from the Sugar calendar to Microsoft Outlook:

1. Navigate to the Advanced tab in your user preferences and scroll to the Calendar Options section.
2. Copy the Search location URL.

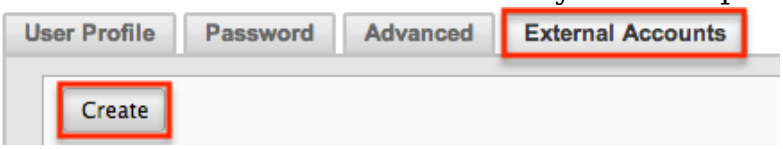
3. In Outlook, go to File > Options > Calendar > Free/Busy Options.
4. In the Internet Free/Busy section, paste the Search location URL into the corresponding box.

Please note that the settings must be configured on each user's computer. Once configured, the invitee shows as busy for any times currently scheduled in Sugar if the user's email address in Sugar matches the invitee email address in Outlook.

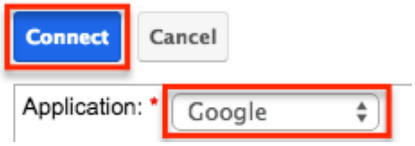
## External Accounts Tab

The External Accounts tab allows users to connect to external applications (e.g. Google, GoToMeeting, WebEx, etc.) from Sugar. Please note that you must have an existing account with the external application prior to connecting in Sugar. Connecting to your Google account enables you to upload and access documents stored in the Google Drive™ from the Documents module. In addition, you can upload and view Sugar documents via the Google Drive. For more information on how to upload and view external source documents, please refer to the Documents documentation. If you connect to your GoToMeeting and WebEx accounts, you will be able to schedule meetings in Sugar to be hosted by one of these applications. Please note that you must indicate the specific meeting type (e.g. Sugar, GoToMeeting, WebEx) when creating the meeting in Sugar. For more information on scheduling meetings, please refer to the Meetings documentation.

The following steps cover connecting to the Google application as an example:

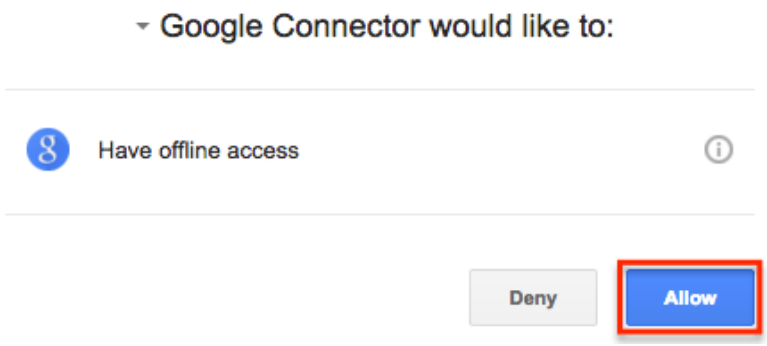
1. Click the External Accounts tab in your user preferences then click "Create".


2. Select "Google" in the Application field then click the Connect button.
    - Note: If the Google option is not available to select in the Application field, the Google connector may not have been configured properly via Admin > Connectors. Please reach out to your Sugar administrator to have the Google connector configured. For more information on configuring connectors, please refer to the System documentation in the Administration Guide.




3. After clicking "Connect", a pop-up window will appear. Click "Allow" to grant permission for the connection to occur.
    - Google's login screen may appear inside the pop-up if you are not

already logged in to your Google account in the active browser window. Simply enter your credentials then click "Allow" in the next window.
- Note: Your browser's pop-up blocker must be disabled to ensure that the Google account connects successfully to Sugar.




The Google application is now connected to your Sugar account and will appear under the External Accounts tab. Please note that for Google, GoToMeeting, and WebEx, you can only be connected to one account per application in Sugar.

## Access Tab

Users can view their access information (e.g. Access table, Roles, My Teams) via the Access tab in the detail view of their profile. System administrators can assign users to various teams and roles depending on what each user is allowed access to in Sugar. You will be able to view the team(s) and role(s) assigned to you via the Roles and My Teams section in the Access tab.

### Access Table

The Access table summarizes the set of permissions assigned to the user and allows them to view the type of access they have along with the actions (e.g. View, Edit, Delete, etc.) they can perform in Sugar. Only system administrators have the ability to create roles and assign them to users. Users who are assigned to the role will only be able to perform actions defined by it. Please note that users with more than one role assigned will have the more restrictive role setting prevail on the access table. For example, if one role allows the user to delete records in the Contacts module, but the other role does not allow record deletion, the user will not be able to delete records in the Contacts module. The table will list the modules in rows on the far left with column headers representing the type of action (e.g. Delete, Edit, Export, etc.) users can perform in each module. For more information on the Access table column headers, please refer to the Setting Module-Level Permissions section in the Role Management documentation.

The following setting options are available for the Access column on the table:

- Enabled : The user is allowed access to this module.
- Not Set : Does not restrict or grant access to this module, defaults to having "Enabled" access when selected.
- Disabled : The user will not be able to access this module, view any of its records, or see any trace of its existence in Sugar.

The following setting options are available for the Access Type column on the table:

- Normal : The user will be able to perform standard functions in this module barring restrictions from other roles or team settings. The user will not have any type of access to the Admin menu for this module.
- Not Set : Does not restrict or grant additional access to this module, defaults to having "Normal" access when selected.
- Admin : The user will supersede any team restrictions for this module and be able to view all records.
    - Note: User does not get access to developer tools such as Studio and Workflow Management.
- Developer : The user will be given access to the module-specific sections of Studio, Workflow Management, Dropdown Editor and any other necessary menus in Admin that are specific to the module.
  For more information on developer tools, please refer to the Developer Tools documentation.
- Admin & Developer : The user will be given the rights defined with the Admin and Developer role settings.

The following setting options are available for the actions (e.g. Edit, Delete, Export, etc.) on the table:

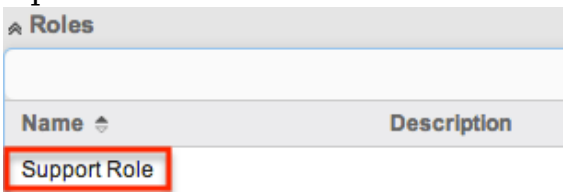
- All : The user will be able to perform this action on any and all records that can be accessed.
- Owner : The user will only be able to perform this action where the Assigned To field is set to be this user.
- Not Set : Does not restrict or grant access to this function and actions default to having "All" access when selected.
- None : The user is not able to perform this action while using this module.




Roles

Sugar Roles define permissions for users such as what kinds of records they can access and what level of access they are allowed . Roles work in conjunction with teams to form a robust security model for non-admin users in Sugar. Roles control three different layers of access for users within Sugar: module, field, and action-level access. Please note that only users who are assigned to the specific role will be able to perform actions (e.g. view, edit, delete, etc.) defined by it. For more information on the various actions and setting options for roles, please refer to the Access Table section of this documentation. Users who are not assigned to a role can access and perform actions in any module as long as they are assigned to the record or a member of the team assigned to manage it. System administrators have the ability to create various roles and assign additional roles to users via Admin > Role Management. For more information on creating and assigning roles, please refer to the Role Management documentation.

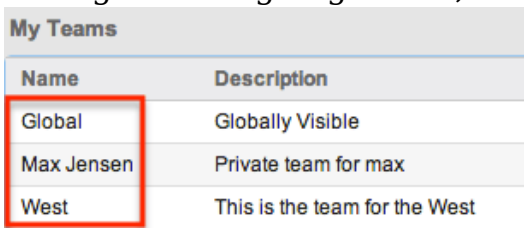
The Roles section displays the list of roles (if any) assigned to the user. Please note that if you are assigned to more than one role, the more restrictive role setting prevails. For example, if you have two roles where one role allows exporting of records in the Leads module and the other does not, then you will not be able to export lead records due to the more restrictive role setting.




My Teams

Teams consist of one or more users who are assigned to manage records in Sugar. The defined permissions determine what records a user is and is not able to access. Teams are used in conjunction withroles to form a robust security model for non-admin users in Sugar. The My Teams section displays the list of teams a user is associated with, which determines what records the user has access to in Sugar. Please note that every record is assigned to at least one team, but can be

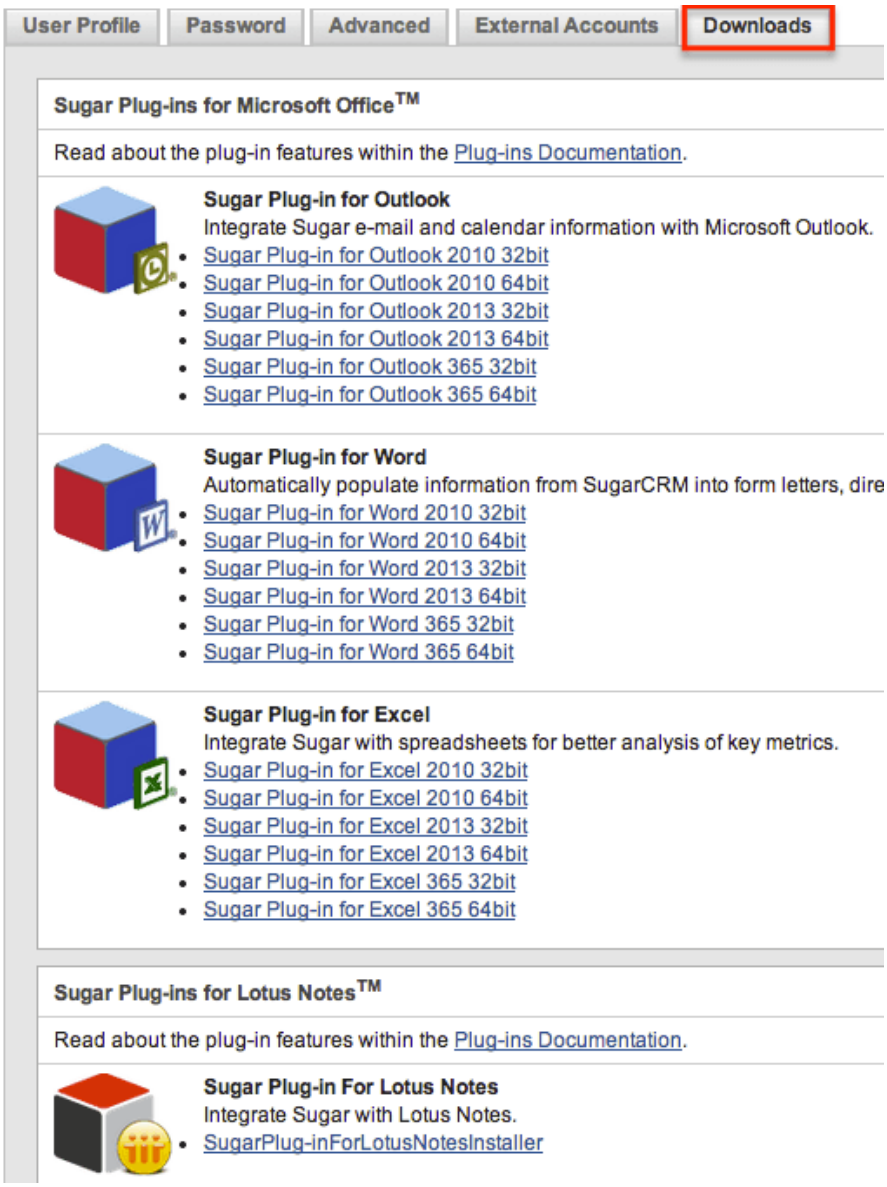
assigned to multiple teams as well if different users need access to it. The default team(s) set in the User Settings section under the Advanced tabwill automatically be assigned to new records created by the user. Users assigned to the record, as well as system administrators can access the record regardless of team membership. When a user is created in Sugar, they are automatically associated with the Global team (universal team) and a Private team (users own personal team) is created by default. System administrators can assign users to additional teams via Admin > User Management or Admin > Team Management as necessary. For more information on teams as well as creating and assigning teams, please refer to the Team Management documentation.




## Downloads Tab

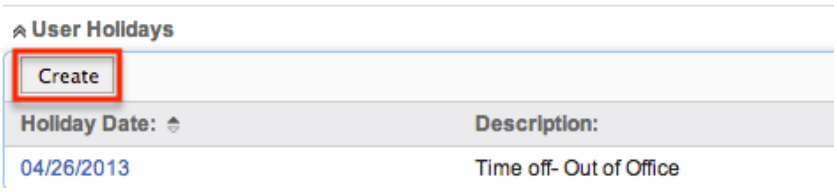
The Downloads tab contains the Sugar Plug-ins for Microsoft Office (i.e. Sugar Plug-in for Microsoft Excel, Outlook, and Word) and Sugar Plug-in for Lotus Notes. Excel plug-in enables you to create, delete, update, or view data that is in your Sugar application. Outlook plug-in allows you to archive emails to Sugar, synchronize contacts, meetings, and tasks, as well as create new Sugar records. Word plug-in enables you to merge data, such as names and address in Sugar to perform mail merges. These plug-ins are available with all commercial editions of Sugar and must be installed on each Windows computer running the Microsoft Office application where the plug-in is desired. Lotus Notes plug-in allows you to integrate with Sugar by synchronizing meetings, tasks, and contacts, as well as archiving emails to records in your instance. The plug-in comes with the Enterprise or Ultimate editions of Sugar and is available for purchase a la carte for Professional and Corporate customers.

To download the plug-in(s), click the appropriate file that corresponds to your version and bitrate of Microsoft Office Excel, Outlook, or Word. Please be sure to check for the correct version and bitrate of your Microsoft Office application in order to download the correct file for installation. For the Lotus Notes plug-in, the latest version will be available for installation in the Downloads tab. For more information on downloading and installing the Sugar plug-ins, please refer to the appropriate Plug-ins documentation.




## User Holidays

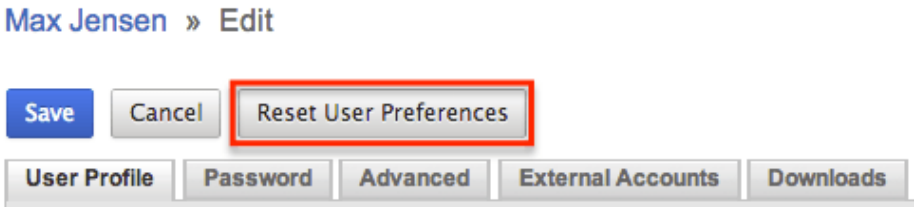
The User Holidays subpanel appears in the detail view (e.g. User Profile tab, Advanced tab, etc.) of the user's profile. Administrators can record the days that users will not be working so that the time off is considered when calculating project timelines in the Projects module. To add a holiday, click the Create button and enter the date of the holiday along with a description and then click "Save". Users will be able to select the scheduled holiday(s) via the Project Holidays subpanel in Projects-related modules. For more information on creating and managing projects, please refer to the Projects documentation.




## Resetting a User's Preferences

Users can reset their user preferences back to the default out-of-the-box settings, which will revert all changes made to the user preferences section (e.g. User Profile, User Settings, Locale Settings, etc.). To reset your user preference, click the Reset User Preferences button at the top of your profile in edit view or click the Actions menu then select "Reset User Preferences" in detail view.

From edit view:

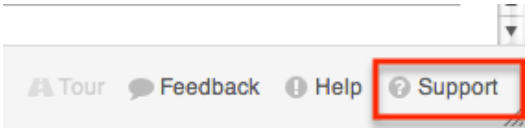



From detail view:



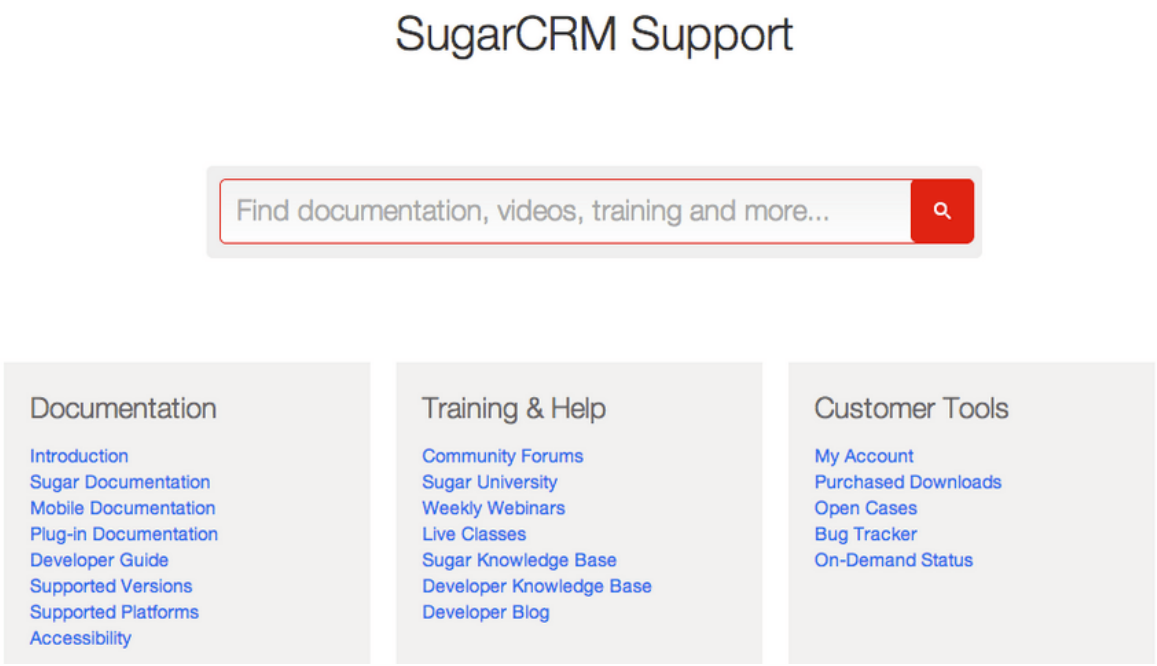

# Accessing Support

The SugarCRM Support page provides access to various Sugar Support resources such as the case portal, documentation, knowledge base, training, etc. Users can access the support page by clicking the Support icon on the bottom right of every Sugar page. To access Sugar's Support page outside of your instance, go directly to the SugarCRM Support page (http://support.sugarcrm.com) on your web browser.



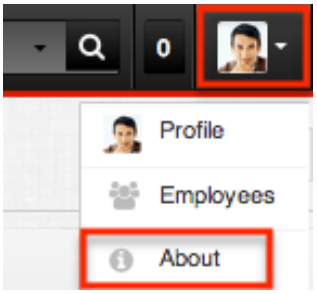

The Get Started section of the Support page provides users, administrators, and

developers with the appropriate resources to get them started in configuring, customizing, and utilizing the application. The Documentation and Training & Help sections provide access to Sugar's self-help area where you can learn how to use various parts of the application via online documentations, classes, videos, knowledge base articles, etc. It also provides key information on supported versions and platforms to ensure you are running Sugar in the best performing environment. The Sugar Knowledge Base provides articles based on specific topics and areas of Sugar while the Documentations go over the entire Sugar application in detail. The Customer Tools section enables you to keep up-to-date with the latest version of Sugar. In addition, support authorized contacts can manage their Sugar subscription, view all purchased orders with Sugar, as well as download purchased software (e.g. Sugar Plug-in for Outlook, Sugar Plug-in for Word, etc.) for installation.




## Viewing Instance Information

Users can find information regarding their version and build of Sugar by clicking their user name on the upper right of Sugar and selecting "About". For example, this will be useful if you need to confirm the current version and edition of your instance.



Last Modified: 01/25/2017 01:46pm

# User Interface

## Overview

Sugar's user interface is where modules, fields, subpanels, dashboards, etc. are housed for users to view, edit, and create data in the application. Knowing how to properly navigate around the application along with what the various layouts, options, and action items do in Sugar will be critical in managing your data in the system. This documentation will go over the basics of Sugar's user interface as well as the various layouts, options, features available to navigate around the application.

## Sidecar Modules

This documentation will cover the new user interface which was introduced in Sugar 7 called Sidecar. Below is a list of modules which use the Sidecar user interface. Other modules continue to use the Legacy user interface which is described in detail in the User Interface (Legacy) documentation.

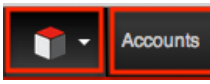
- Accounts
- Bugs
- Calls
- Cases
- Contacts
- Forecasts
- Home
- Leads
- Meetings
- Notes
- Opportunities
- Quoted Line Items
- Revenue Line Items
- Targets
- Target Lists
- Tasks

Note: Custom modules that are created in Module Builder will utilize the Sidecar user interface. Custom modules installed to an instance prior to Sugar 7 that were not created in Module Builder will use the Legacy user interface upon upgrade to

7.x.

## Navigation Bar

All pages within Sugar display a navigation bar spanning across the top of the screen. The navigation bar allows you to access the various modules (e.g. Accounts, Contacts, etc.), access your Home page, perform a global search, etc. Please note that you can configure the navigation bar in your user preferences to select what modules you want displayed or hidden, as well as the order it is displayed. For more information on configuring the navigation bar, please refer to the Layout Options section of the Getting Started documentation.

The default navigation bar consists of the following options from left to right: 

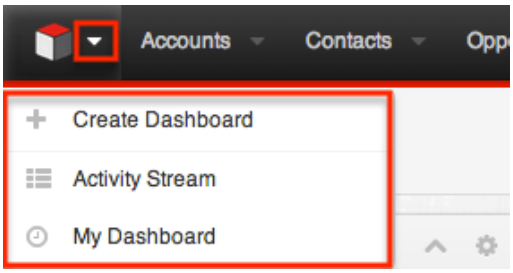

| Navigation Item | Description |
|---|---|
| Home | Click the Sugar Cube icon on the upper left to access the Home page dashboard, as well as the Activity Stream. |
| Module Tabs | Both default and custom modules can be displayed in the navigation bar. Click the triangle within each tab to display the Actions, Recently Viewed, and Favorites menu. |
| Global Search | Enter keywords into the global search bar to search for information across the entire Sugar database. |
| Notifications | View and access system notifications (if any) by clicking the notification box. The displayed number in the box indicates the number of pending notifications. |
| User Menu | Click the user profile image to display the user menu, which allows access to your profile, employees page, etc. |
| Quick Create | Click the Plus icon to display the Quick Create menu. |

### Home

Sugar's home page houses both the users dashboard and activity stream. By default, the "My Dashboard" will display on your Home page and include stock

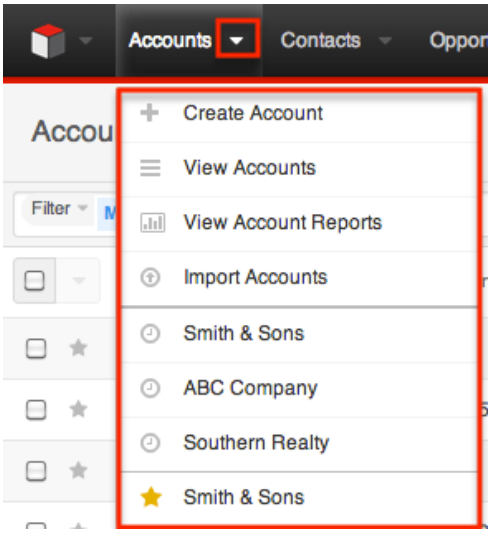
dashlets such as "My Contacts", "Top 10 Sales Revenue Line Items", etc. Users can also access the activity stream from their Home page to view user posts and record posts specific to the various module records. As you navigate around in Sugar, you can return to your Home page simply by clicking the Sugar cube icon on the upper left of the screen.

You can click the triangle next to the Sugar cube icon to create a new dashboard, as well as access your existing dashboard(s) and activity stream. For more information on creating dashboards, please refer to the Intelligence Pane documentation.



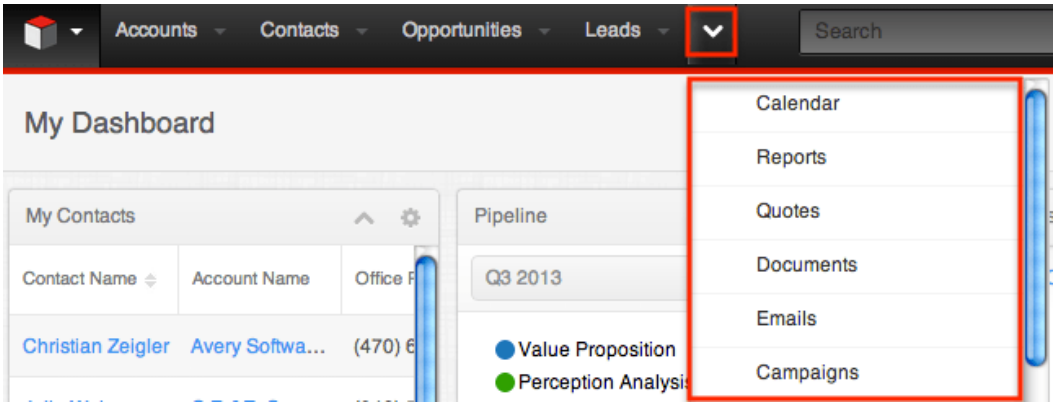

## Module Tabs

Module tabs are located to the right of the Sugar cube icon on the navigation bar at the top of any Sugar screen. To access the specific modules list view, simply click the module tab. You may also click the triangle within the module tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. TheRecently Viewed menu displays the list of records you last viewed in the module. The Favorites menu displays the list of records you most recently marked as favorites in the module.




The number of displayed module tabs depends on your screen resolution as well as the size of your browser window. The additional module tabs that are not displayed on the navigation bar will appear when you click the Down arrow to the right of

the last module tab.




If you do not see a particular module tab in Sugar, please check the following:

- The module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the module for your entire Sugar instance. Reach out to your Sugar administrator to have the module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

## Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full-Text Search is used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right-hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.



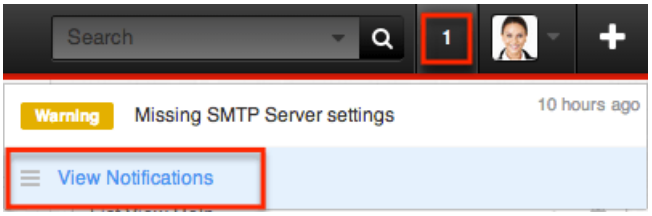

To use the global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with

words beginning with your keyword. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

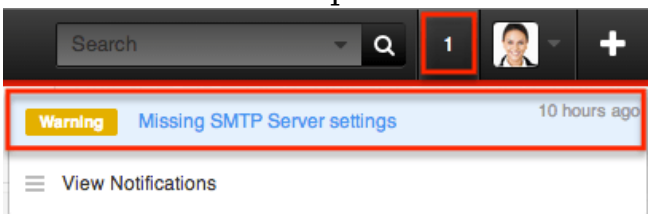
Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

## Notifications

The Notifications indicator is available to all users and is located on the upper right of the screen next to global search. The number displayed in the notifications box indicates the number of messages with a status of "Unread". A "0" will appear if there are no unread notifications. Clicking the number will reveal the Notifications dropdown which displays key messages, warnings, and alerts relevant to the current user. From the open Notifications dropdown, click "View Notifications" in order to see all notifications in a list view.




You can also navigate directly to a single notification's record view by clicking it in the Notifications dropdown.




### Notifications Severity Levels

Each notifications will have one of four severity levels:

- Alert (Red) : Indicates something is critically wrong with your Sugar instance

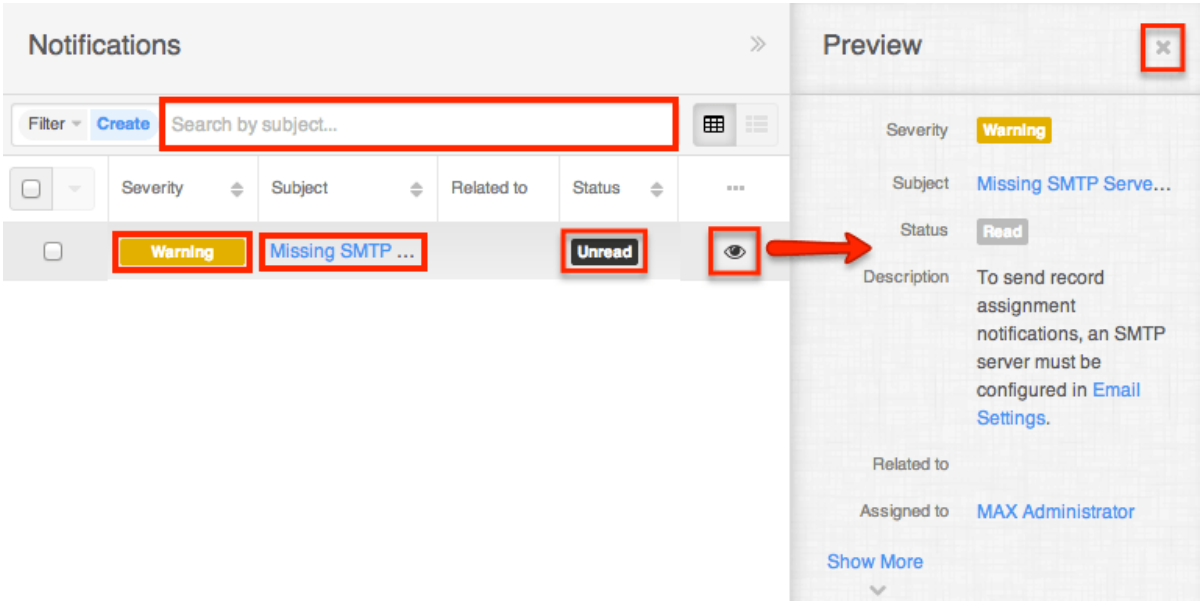
and needs the attention of your Administrator immediately
- Warning (Orange) : Indicates something in your Sugar instance needs your attention or the attention of your Sugar Administrator to remedy
- Information (Blue) : Standard notification including reminders of an upcoming meeting, call, or task

    - Note: In order for a notification to appear, a newly created activity must be scheduled to begin at least one hour later than the time it was created.
- Success (Green) : Indicates the successful completion of an action or configuration change

Notification List View

The Notifications list view displays all notification records meeting the current search criteria. For more information about searching for the desired records, please refer to the Module Search section. The following information and options are available from list view:

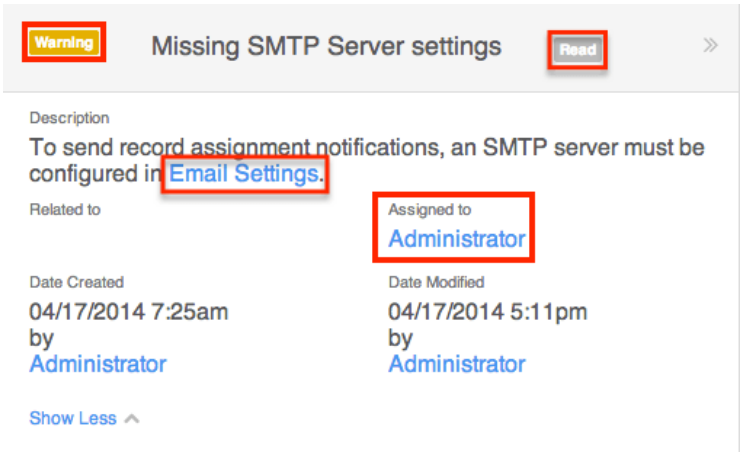
- Preview : You can preview a notification record's details by clicking the Preview button to the right of the notification. A preview can be closed by clicking the "x" at top right.
- Severity : The color-coded severity of each notification is displayed.
- Status : The Status field indicates whether or not a notification has been viewed. A notification will be automatically marked as "Read" if the record view is opened or the notification is previewed. Users may also manually toggle the Status field by clicking its current value.
- Record view : To open a notification in record view, simply click the notification's subject.




Notifications Record View

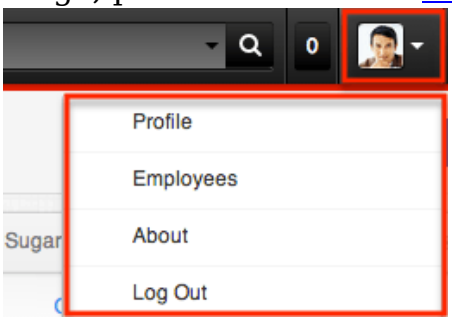
The Notifications record view displays the details of a specific notification. The following information and options are available from record view:

- Links : If a notification requires actions within the Sugar application, a link may appear in the Description field. Clicking the link will take you to the related record or area the notification mentions.
- Severity : The color-coded severity of each notification is displayed.
- Status : The Status field indicates whether or not a notification has been viewed. A notification will be automatically marked as "Read" if the record view is opened or the notification is previewed. Users may also manually toggle the Status field by clicking its current value.



## User Menu

A profile image icon will display on the upper right of Sugar and you can click this to display the user menu where you can access your profile, the employees page, etc. Please note that you can upload an image via your user profile to display as your main profile image in Sugar. For more information on uploading your profile image, please refer to the Getting Started documentation.



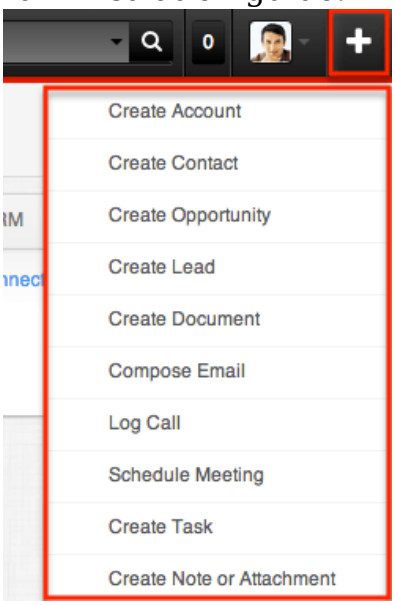

The user menu allows you to perform the following operations:

| Menu Item | Description |
|---|---|
| Profile | View your user profile, change your password, and personalize various aspects of Sugar |
| Employees | Navigate to the Employees module list view to search and view employee records<br><br>Users with administrative privileges can also create and edit employees in the system<br>Note: Every user is listed as an employee; however, not every employee has to be a user in Sugar |
| Admin | Navigate to the Administration page to configure and customize various aspects of your Sugar instance<br>Note: Available only if you have administrative access or developer privileges in Sugar |
| About | Navigate to the About page which displays the current edition, version, and build of Sugar as well as credits and source code references |
| Log Out | Log out of your current user session<br><br>Note: You will be directed back to the |

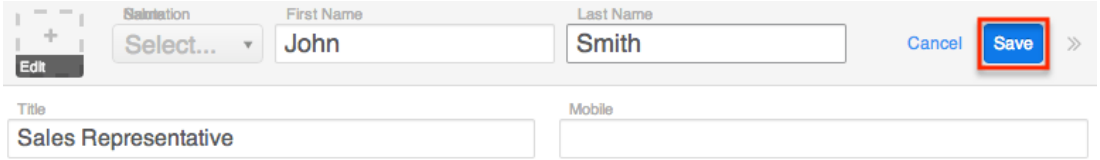
| | |
|---|---|
| | main login page |

## Quick Create

The Quick Create menu allows you to easily create new records for various modules from anywhere in Sugar. Simply click the Quick Create button on the upper right of any Sugar page to access the menu. Please note that a maximum of ten modules may be enabled to display in the Quick Create menu. Administrators can configure which modules are enabled in the Quick Create menu via Admin > Configure Navigation Bar Quick Create. For more information on how to add or remove modules from the Quick Create menu or to change the order of the modules in the menu, please refer to the Developer Tools documentation in the Administration guide.




Clicking on an item in the Quick Create menu will open the record view form for the specific module. When using quick create to make a record while viewing an existing record of another module where there is a relationship between the two modules, Sugar automatically creates a relationship between both records. For example : if you are viewing an account record (e.g. ABC Company) and create a new contact via the quick create form, the Account Name field in the contact record will automatically populate with "ABC Company", thus creating the link between the two records. All required fields will indicate "Required" in the field and must be completed prior to saving. Please note that administrator's have the ability to configure the record view layout via Admin > Studio. For more information on configuring record view layouts, please refer to the Studio documentation in the Administration guide.



Once the necessary information is entered, click "Save". If you do not wish to create the record, simply click the Cancel button.

Note: Because the Quick Create drawer overlays the page from where it is launched, using the browser's back button will appear to send you back two pages instead of to the previous view. To return to the previous view, use the Quick Create form's Cancel option instead.

## Footer

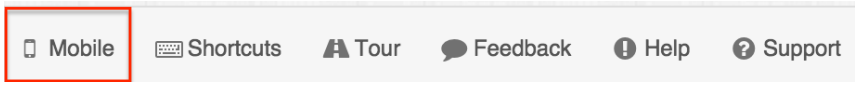
Sugar's footer displays the SugarCRM logo (By default), Tour link, Feedback link, Help link, Support link, as well as links to enabled third-party integrations. Users can click these links to go back to their Home page, take a tour of Sugar's user interface, access the SugarCRM Support page, etc.

The following links are available in Sugar's footer:

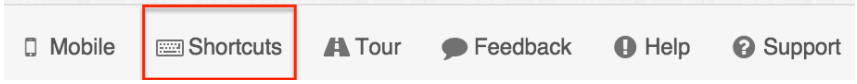
- Logo : Click the logo on the bottom left of Sugar to go back to your home page. Please note that an administrator can replace the SugarCRM logo with the organization's logo via Admin > System Settings. For more information on how to change the logo in the footer, please refer to the System Settings documentation in the Administration guide.



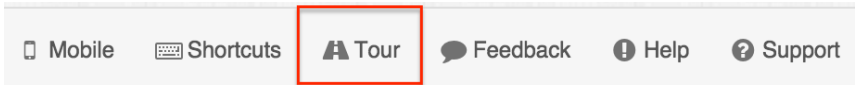

- Widgets : To the right of the SugarCRM link, any third-party widget icons will appear here.
- Mobile : When viewing Sugar via a touch-screen device, the Mobile link will appear allowing you to view Sugar's mobile site.




- Shortcuts : Access the Keyboard Shortcuts help page to view the various shortcut keys available to use along with a description of the actions they perform. For more information regarding the Keyboard Shortcuts help page, please refer to the Accessibility documentation.

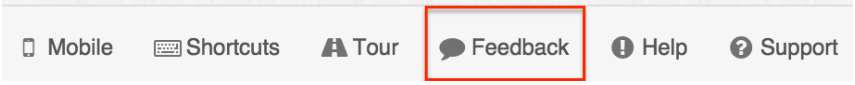



- Tour : Launches a quick tour to show key features of the user interface for the Sidecar module page (e.g. Accounts) you are currently viewing. For more information regarding the Sugar 7 tour, please refer to the Tour section of the Getting Started documentation.

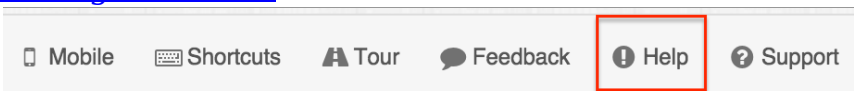



- Feedback : The Feedback window will pop up allowing you to communicate

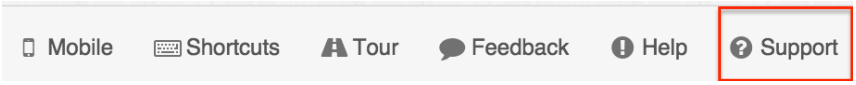
your overall satisfaction with Sugar. Once you have entered the necessary information, simply click "Send" to submit your feedback.




- Help : Access the Help dashboard via the Home page or a Sidecar module's list view/record view (e.g. Accounts). Clicking the Help icon again hides the Help dashboard and displays the stock My Dashboard (if available) again. For more information on viewing the Help dashboard, please refer to the Intelligence Pane documentation.



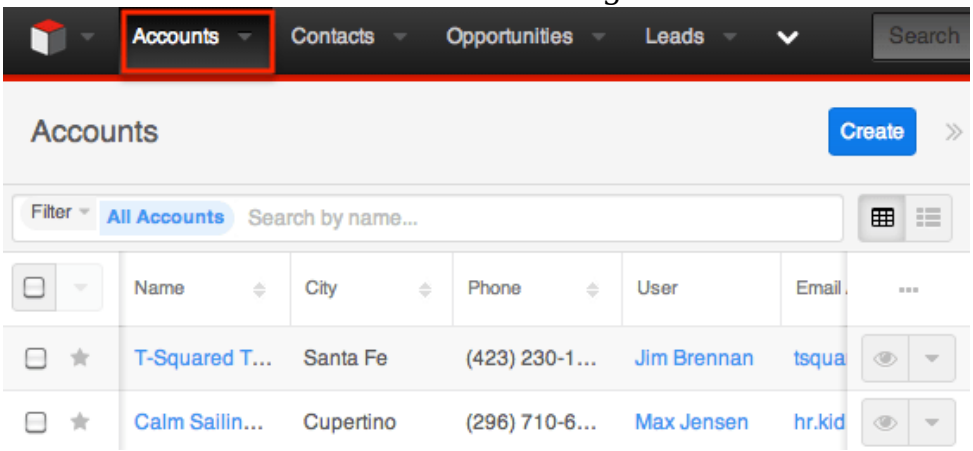

- Support : Opens the SugarCRM Support page where you can access the case portal, documentation, online training, etc.




## List View

A module's list view displays all records meeting the current search criteria and to which users have access. You can view the basic details of each record within the field columns of the list view or click the record's name to open the record view. To access a module's list view, simply click the module tab (e.g. Accounts) in the navigation bar at the top of Sugar.

Please note that you will only be able to see records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

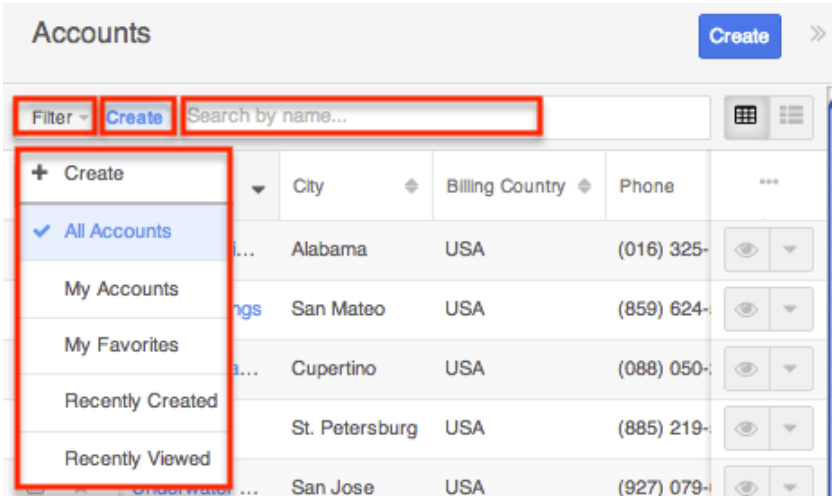



Users with administrator or developer access have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Module Search

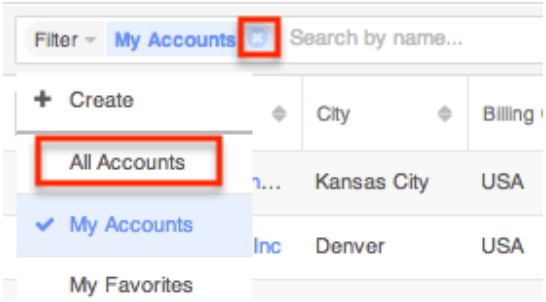
Module search enables users to easily search by the record's name within the module and pull up matching records in the list view. The search also provides a Filter option allowing you to narrow your search further using the available options as follows:

- Create : Create a new custom filter which you can use to filter your search
  - Note: You can also click "Create" to the right of the Filter option.
- All "Module Name" : Returns all records in the module (e.g. Accounts) to which you have access
- My "Module Name" : Returns only records assigned to you
- My Favorites : Returns only records you have marked as favorites
- Recently Created : Returns only records you created in the module within the last 7 days
- Recently Viewed : Returns only records you have viewed in the module within the last 7 days




When you choose a filter, Sugar will return record's which match both the selected filter and any name provided in the open Search box in the filtered list view results. For example, if you select "My Accounts" in the Filter options and enter an account name, Sugar will only return account records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search bar. To see all account records to which you have access, simply select the All Accounts option in the filter and remove any text from the search bar. You can also click the Clear icon within the selected filter option (e.g. My Accounts) in the Search bar to clear the filter and pull up all list view search results. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the module. In addition, searches using the open Search box only or in combination with advanced filters (e.g. My

Favorites) are preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter.




Please note that you will only be able to see records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Administrators can configure what fields appear on the Module Search via Admin > Studio for certain modules. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

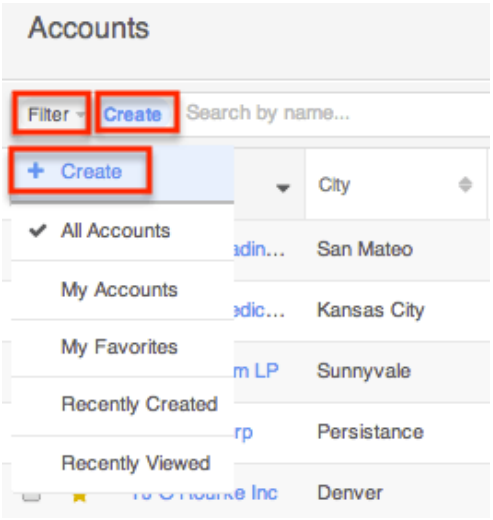
## Creating a Filter

Users can also create new filters via the Create option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the module's list view. You have the option to add multiple fields to your new filter by clicking the Plus button to the right of the filter selection dropdown lists and set select operators along with their value(s). A filter's criteria need to be true for a record in order for it to appear in the list view search result. Additionally, filters with no specified values may be saved as a custom filter to act as a filter template when a user often searches using the same fields but with varying values. Please note that only fields you have view access for will appear in the Filter list when creating a search filter.

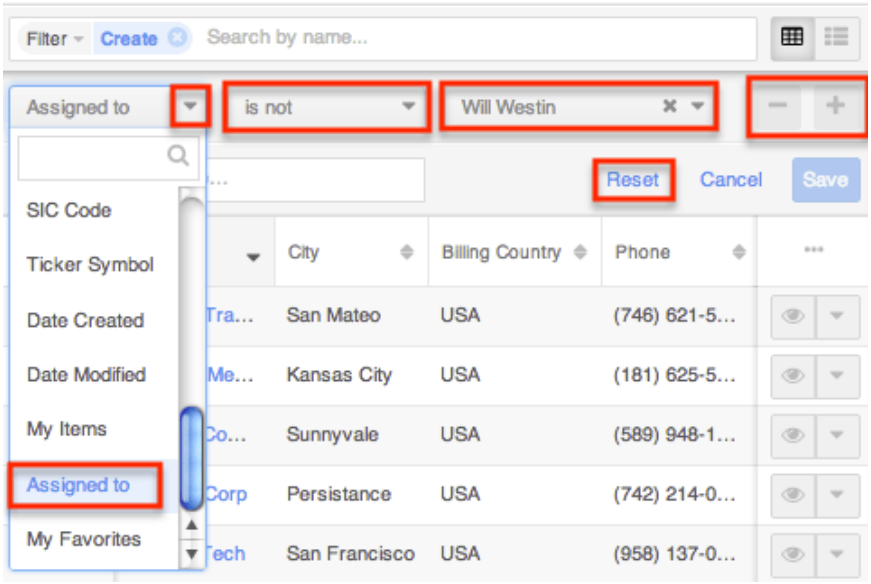
When you run a search using a created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter.

The following steps cover creating a new Assigned to filter for the Accounts module as an example:

1. Click the Filter option on the Accounts search bar then select "Create".
    - You can also click "Create" to the right of the Filter option.




2. Select the field you wish to add to your filter, as well as the condition and matching criteria.
    - Note: Only fields you have view access for will be available to add in the Filter list.
    - For Integer type fields (e.g. case number), you can select the "is any of" operator to pull up records that match any one of the set values (e.g. 100, 200, 300, etc.) in the search criteria.
3. To add additional fields to the new filter, click the Plus button to the right of the filter.
    - To remove fields from the new filter, click the Minus button to the right of the filter.
    - To clear any filter values (e.g. Will Westin), simply click the "x" to the right of the value or select "Reset" to the left of the Save button.

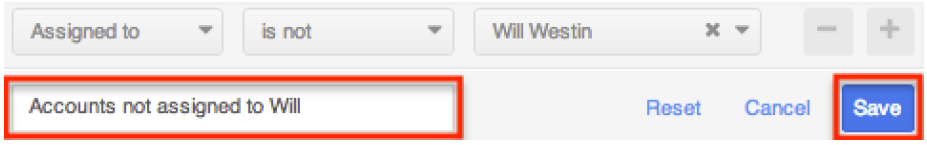



The list view will automatically display results matching your filters as you create and modify the criteria.

Saving a Filter

Saving a filter will preserve the chosen fields as well as the condition(s) of the matching value(s). Additionally, it will allow users to easily select previously created and saved filters from the Filter options.

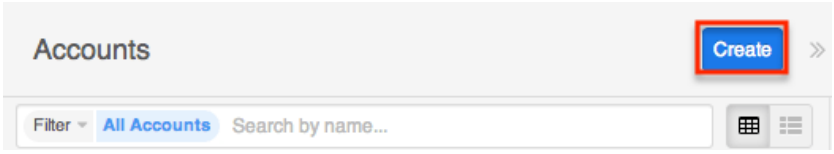
The following steps cover saving a new search by Name filter for the Accounts module as an example:

1. Create a new filter to perform a search on your desired fields.
2. Enter in a name for the new filter (e.g. "Accounts not assigned to Will").


3. Click "Save" to add this filter to the module's Filter options.

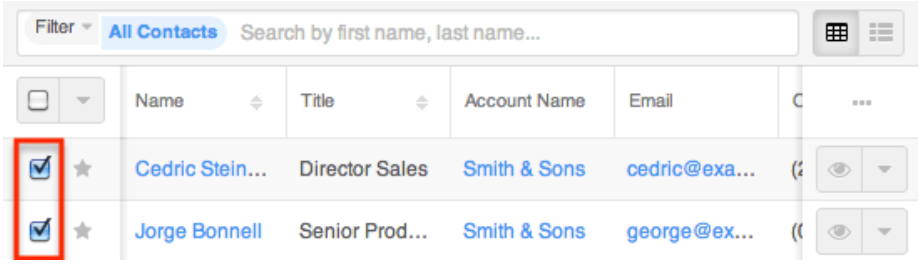
## Create Button

The Create button on the upper right of the module's list view allows users to easily create new record's in the module. Once you click the button, the module's record view layout opens where you can enter all of the relevant information to create the new record. Please note that administrators can configure the Record View layout via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

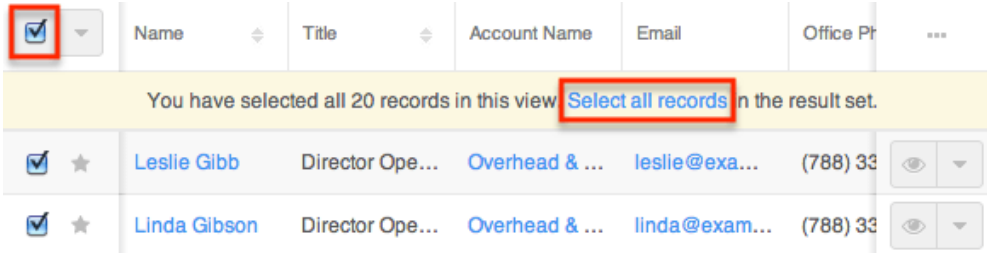



## Checkbox Selection

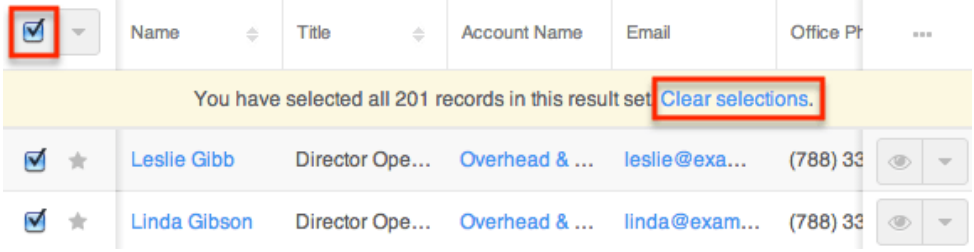
Users can perform various types of actions on module record's by first selecting the desired records from the module's (e.g. Contacts) list view. To select individual records on the list view, mark the checkbox on the left of each record row.



To select all records displayed on the current set of list view results, click the checkbox to the left of the Actions menu. Please note that a dialog will appear below the list view column headers indicating that you have selected all records on the list view's current results set (e.g. 20). To select all records in the module's list view search results, click "Select all records" in the dialog.

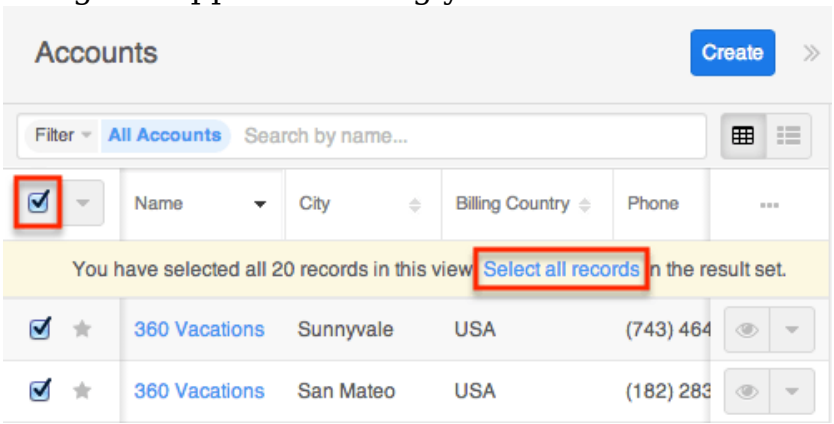



If you wish to clear the selection for all records on the list view result set, simply click "Clear selections" in the dialog. You can also clear the selections for all records by clicking the checkbox option again to remove the check marks.

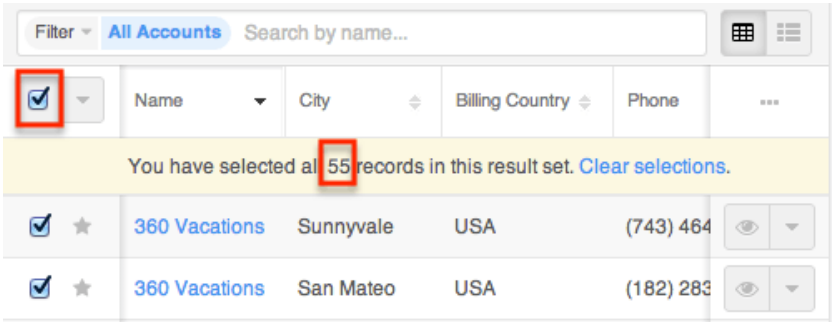



## Total Record Count

You can view the total record count on the list view by selecting all records displayed on the current set of list view results. Once the records are selected, a dialog will appear allowing you to select all records in the results set.

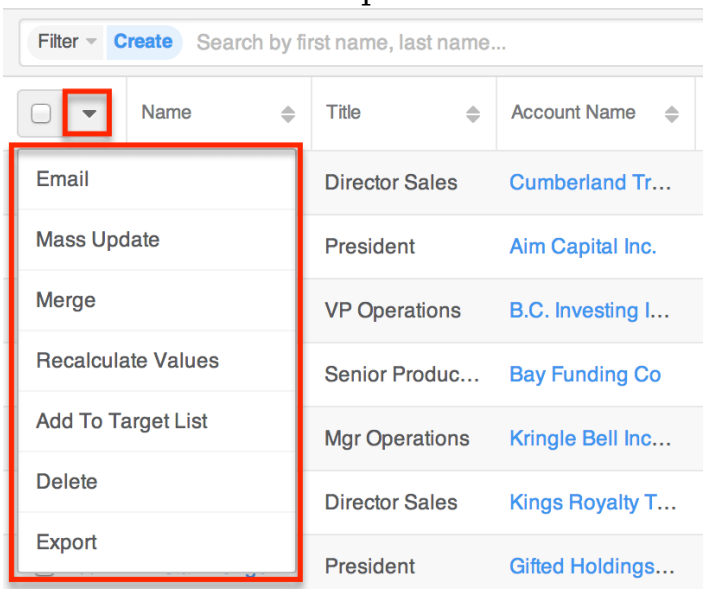



The total count of all records on the list view result set will appear in the dialog.




## Mass Actions Menu

The Mass Actions menu to the right of the checkbox option allows you to perform various actions on the currently selected records. Please note that the actions available (e.g. Mass Update, Add To Target List, etc.) to perform may vary between each of the modules. To access the Mass Actions menu simply click the triangle next to the checkbox option.




The following sections will cover the most common type of actions available in the Mass Actions menu. For more information on the actions available within a specific module, please refer to the list view section in the application guide pertaining to that module.

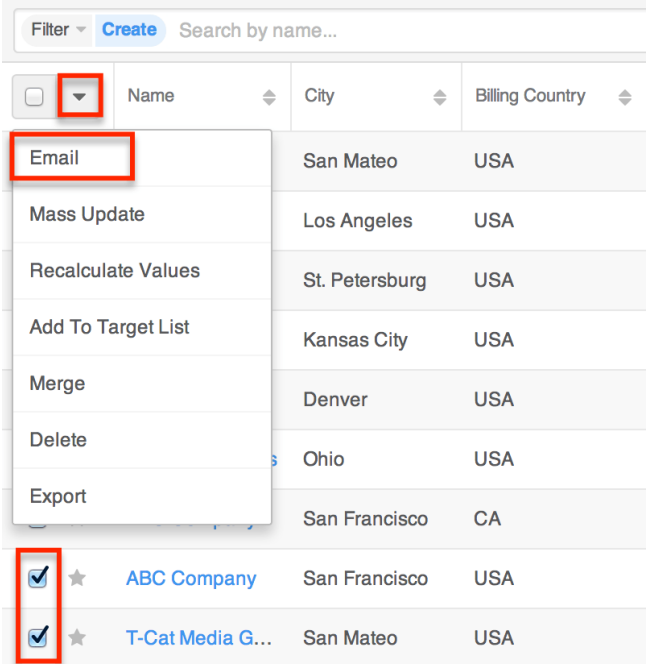
### Email

For modules which include an Email field, the Email option allows users to compose an email message and send it to one or more records at a time from the module's list view. Simply select the desired record(s) from the list view then choose "Email" from the list view Actions menu. The Compose Email window will open allowing you to enter in all relevant information (e.g. subject, body, etc.).

Please note that the email will be sent to the selected record's primary email address on file.

The following steps cover sending a mass email from the Accounts list view as an example:

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the Module Search to find the Account records you wish to include on the email.
3. Select the desired accounts then choose "Email" from the Actions menu.




4. In the Compose Email window, enter in the subject and body of the email message, then click "Send".
    - Note: The email's To field will automatically populate with the name of the selected account record(s).

Once the email is sent successfully, the email record will appear in the History dashlet and Emails subpanel of each account record.

## Mass Update

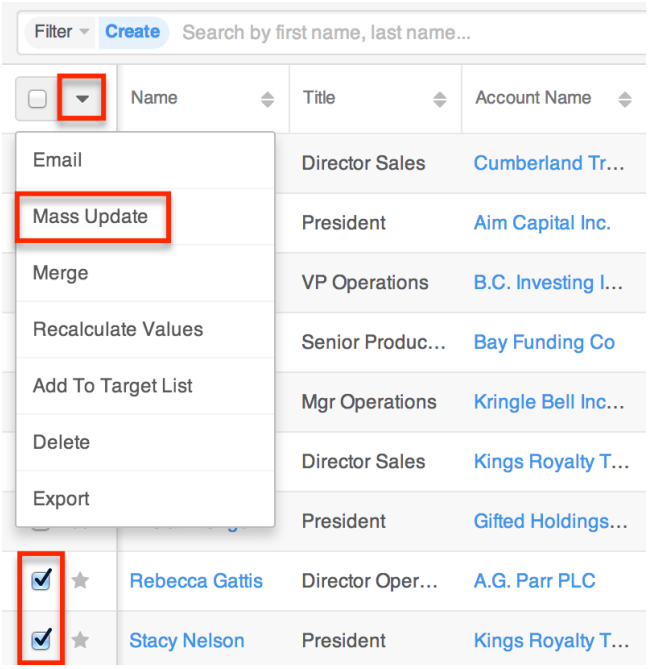
Mass Updating allows users to make the same change to multiple records at one time from the module's list view. Users with administrator or developer level access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide. Sugar allows you to select up to 1000 records at a

time for mass updates. If you desire to mass update more than 1000 records, you will need to perform the updates in several batches by creating a filter to partition the records into smaller subsets.

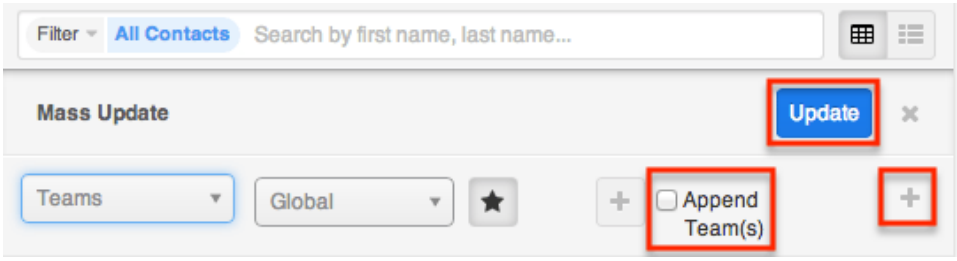
Please note that your ability to mass update may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

The following steps cover mass updating records from the Contacts list view as an example:

1. Navigate to the Contacts list view by clicking the Contacts module tab.
2. Use the list view's Module Search to identify contacts you wish to modify.
3. Select the desired contacts then choose "Mass Update" from the Actions menu.




4. The Mass Update panel will appear below the search bar. Set values for the field(s) you wish to alter.
    - To add additional fields for mass update, click the Plus icon to the right of the dropdown list.Note: For the Teams field, mark "Append Team(s)" to add the teams specified here to any existing team assignments. Not marking the checkbox will replace the existing team assignment with the new one.




5. Click "Update" to save the changes to all of the currently selected contact records.

## Merging

When duplicate records are identified in Sugar, you have the option to merge two or more records into a single record. Once the merge is complete, the duplicate record(s) will be deleted, and the primary record will remain. Please note that all relationships belonging to the duplicate records will be merged to the primary record meaning that any calls, meetings, cases, etc. related to the duplicate record(s) will automatically be related to the resulting, merged record.

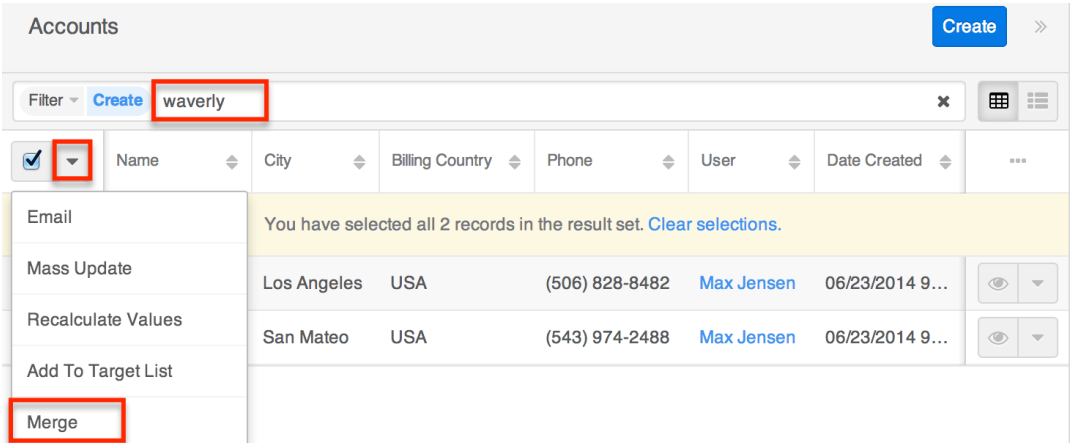
Note: Date Created, Date Modified, and Password field types are not supported when merging duplicate records in Sugar.

### Merging Via List View

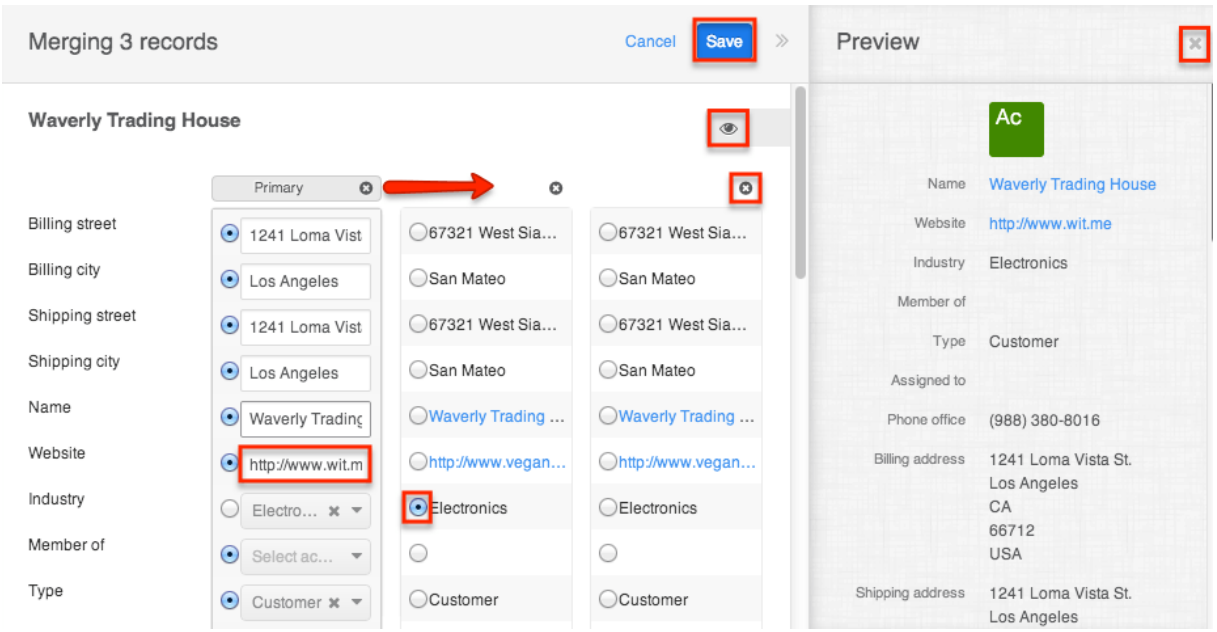
Module Search may be used to identify duplicate records by, for example, searching for records with similar names. Once your search has identified duplicate records, you can merge them directly from the list view.

Use the following steps to merge records via the list view:

1. Use the list view's Module Search to identify duplicate records.
2. Possible duplicates will be displayed in the list view. Select the duplicate record(s) that you wish to merge.
    - Please note that up to five records may be merged at once in Sugar. An error message ("Invalid number of records passed. The valid range is from 2 to 5 records.") will appear if more than five records are selected when attempting to perform a merge.




3. Select "Merge" from the Actions menu to display the Merging Records page. The primary record's field values are displayed on the left while other record's values are in columns to the right. For convenience, fields with differing values will appear on the top of the list. Saving the merge will preserve only the field values marked with the radio button into a single record.




If 3 or more records are selected to be merged, an X icon will appear at the top right of each record. Clicking the "X" will remove the record from the merge process but will not delete the record.

4. To change which record is considered the primary, drag and drop the Primary label on the top of a different column.
5. Review the field values in each column and click the radio button to the left of the value that should appear on the final record. You can also manually type or select a new value for any field as necessary.
    - Fields you do not have Edit access for cannot be edited on the merging records page.
    - Note: The Merging Records page aggregates the Teams field all in one

place and displays it under the designated primary record's column. You can choose which team(s) the merged record should be assigned to by marking the checkbox next to the team name.

6. Preview what the final, merged record will contain as you work by clicking the eye icon to display the preview in the Intelligence Pane.
7. Click "Save" once all fields you wish to appear on the single, merged record have their radio buttons selected.
8. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Confirm" to proceed.

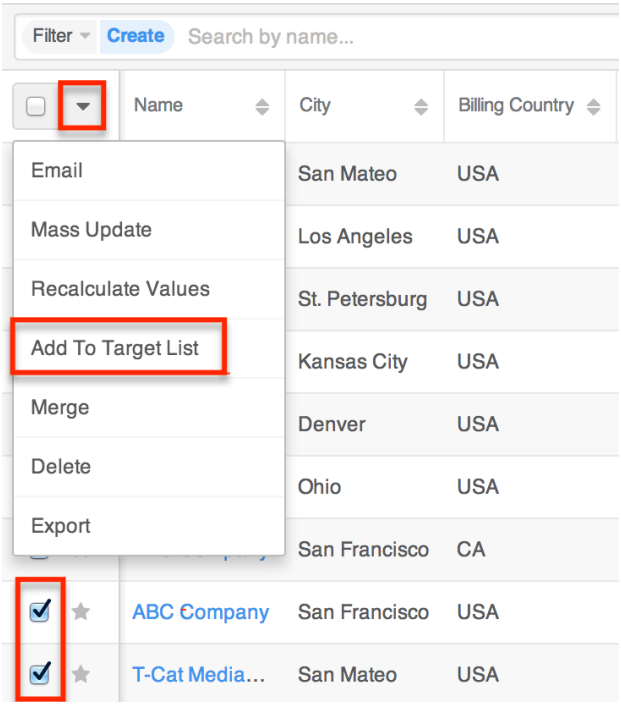
## Add To Target List

A target list consists of a group of individuals or organizations you wish to be included or excluded on a mass marketing campaign. These targets are typically identified based on a set of predetermined criteria such as being a prospect or existing customer, age group, industry, etc. Please note that only the Accounts, Contacts, Leads, Targets, and Users records may be added to the target list.

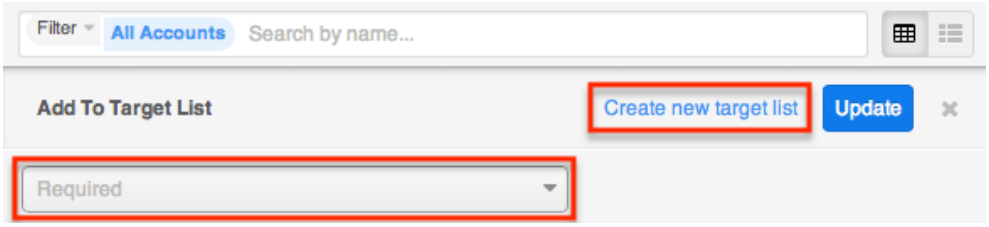
There are various ways to add records to a target list in Sugar including using the Add to Target List option from the module list view's Actions menu. For more information on target lists and other methods of adding records, please refer to the Target Lists documentation. Sugar allows you to select up to 1000 records at a time when adding to a target list. If you desire to add more than 1000 records to a target list, you will need to perform the additions in several batches.

The following steps cover adding account records to a target list via the Accounts list view as an example:

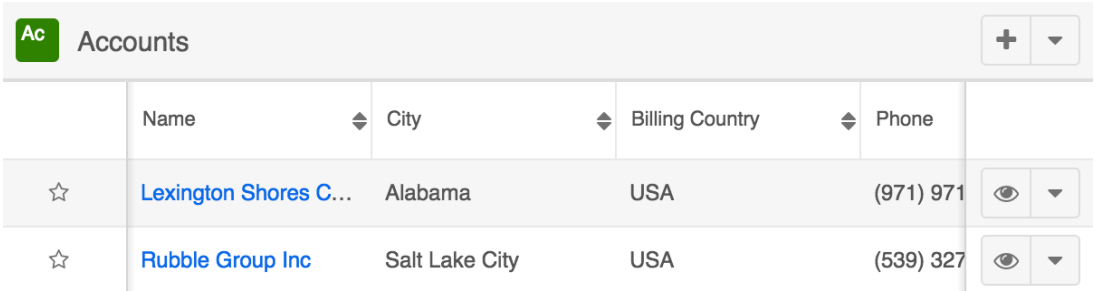
1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the Module Search to find the Account records you wish to add to a target list.
3. Select the desired account records then choose "Add to Target List" from the Mass Actions menu.




4. Below the Accounts search bar, locate and select the desired target list in the dropdown list or click "Create Target List" to add to a new target list. Click "Update" to add the record(s) to the new or existing target list.




In order to view the accounts that have been added, you can navigate to the Target Lists module. Click the target list's name to enter the record view, and you will see the account records within the Accounts subpanel.




Delete

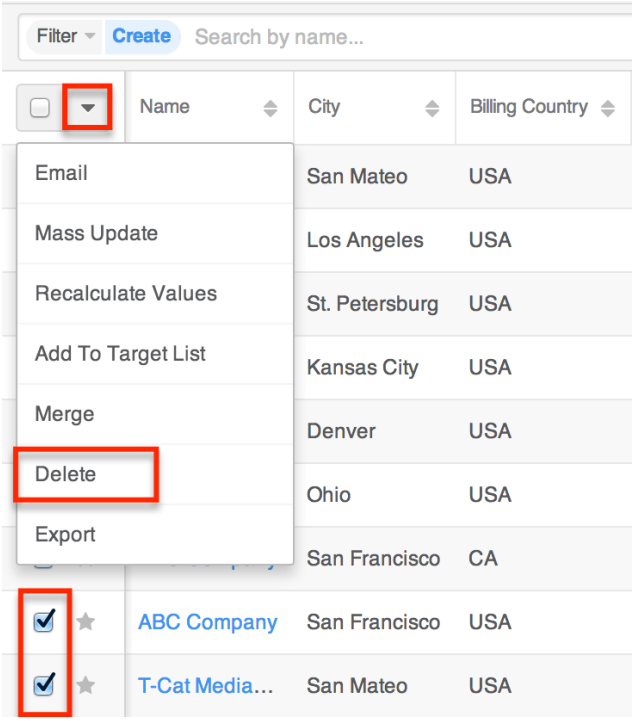
Users have the ability to delete record's that are invalid or should no longer appear in their organization's Sugar instance via the module's list view. Deleting via the list view allows for mass deleting multiple records at once as well as single record deletions. Please note that deleting records will not delete the related records and

will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

Please note that your ability to delete records in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

The following steps cover deleting account records from the Accounts list view as an example:

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the Module Search to find the Account records you wish to delete.
3. Select the desired account records then choose "Delete" from the Actions menu.
    - You can also click the Record Actions menu to the far right of the record's row and select "Delete" to delete individual records from the list view.

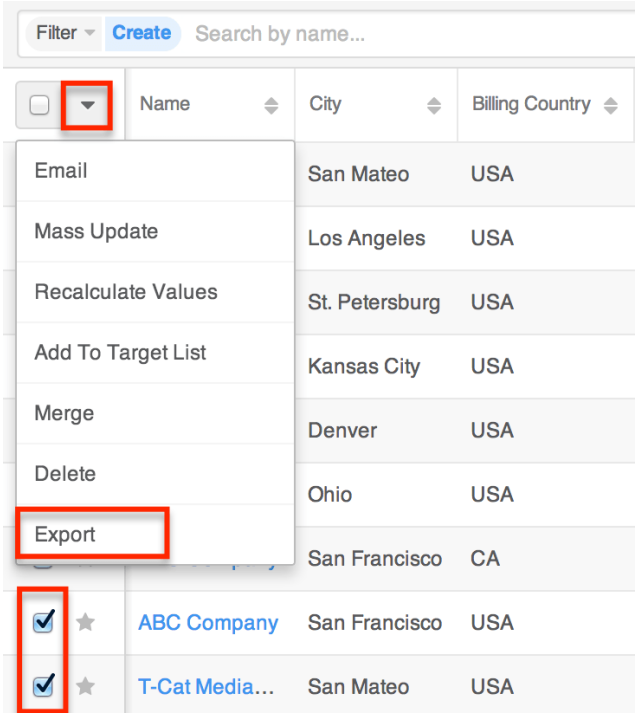



4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

Sugar allows you to select up to 1000 records at a time for deletion. If you desire to delete more than 1000 records, you will need to perform the deletions in several batches.

Export

Sugar's Export option allows users to download all fields for the selected records to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered records back into Sugar. For more information on updating existing records via import, please refer to the Import documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.
Records may be exported from the list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for records and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.




Please note that your ability to export from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

## Recalculate Values

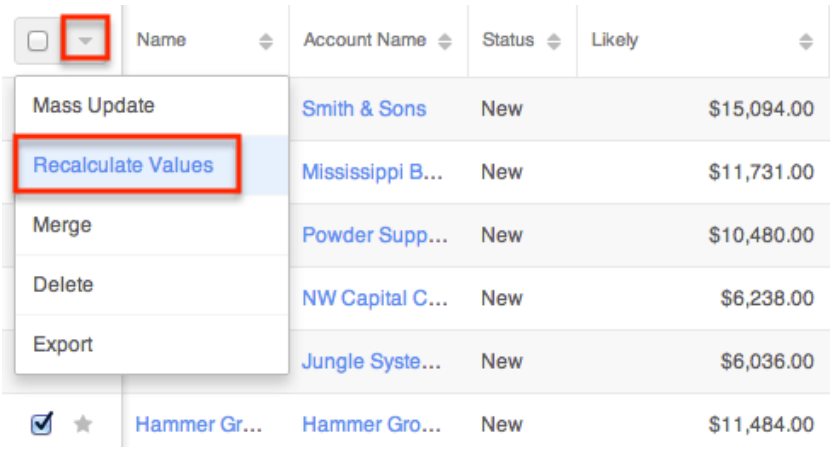
This feature allows calculated values to be recalculated following the addition or alteration of a calculated field in Studio. For more information on calculated fields, please refer to the Studio documentation in the Administration guide. Sugar allows

you to select up to 1000 records at a time for recalculating values. If you desire to recalculate values for more than 1000 records, you will need to perform the recalculation in several batches.

Note: This action will not appear unless the user is an Admin or has developer-level access to the module and if there is at least one calculated value in that module. Please note that your ability to recalculate values may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Recalculate Values option.

The following steps cover recalculating values for records from the Opportunities list view as an example:

1. Navigate to the Opportunities list view by clicking the Opportunities module tab.
2. Use the list view's Module Search to identify opportunities you wish to update.
3. Select the desired opportunities then choose "Recalculate Values" from the Actions menu.

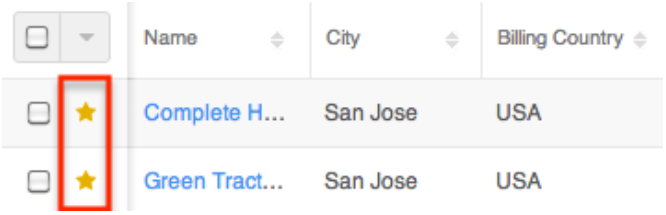



## Favorite Designation

Users have the option to mark records as favorites via the module list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter's My Favorites option or from the module tab's Favorites option. In the module's list view, the star on the left of each record's row is orange once marked to indicate a favorite record.

The following steps cover marking records as favorites via the Accounts list view as an example:

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the Module Search to find the Account records you wish to mark as favorites.
3. Mark the star icon on the left of each desired account's row.
4. To remove the account as a favorite, click the star again to revert it to gray.

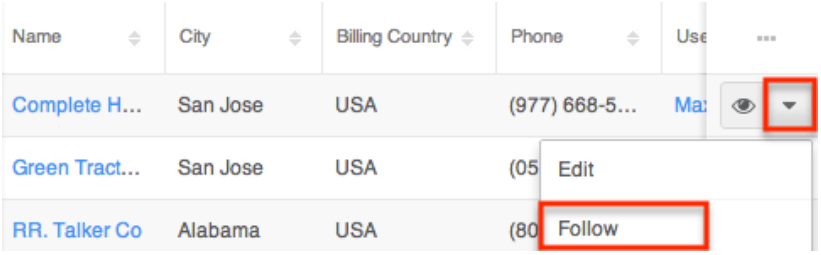



## Following Designation

Users can also choose to follow specific records to which they have access to in Sugar by selecting "Follow" in the Record Actions menu on the list view. The ability to follow records allows each user to personalize their activity stream by specifying which records' posts should appear on the activity streams displayed on their Home page and module list view. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. Should a user lose access to a record in Sugar, they will automatically stop following that record.

The following steps cover marking a record to follow via the Accounts list view as an example:

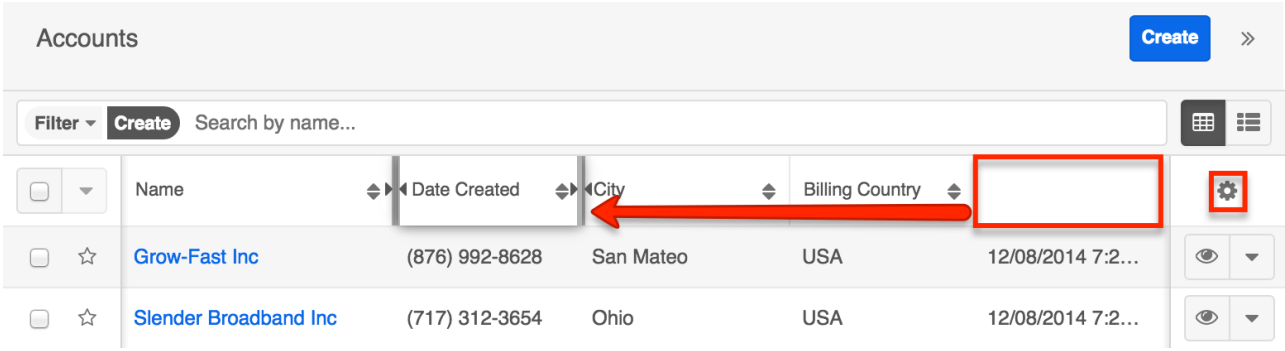
1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the Module Search to find the Account records you wish to follow.
3. Click the Record Actions menu to the far right of the records row and select "Follow".
4. To unfollow the account, click the Record Actions menu then select "Unfollow".




## Column Reordering

List view provides the ability to reorder columns by dragging and dropping the

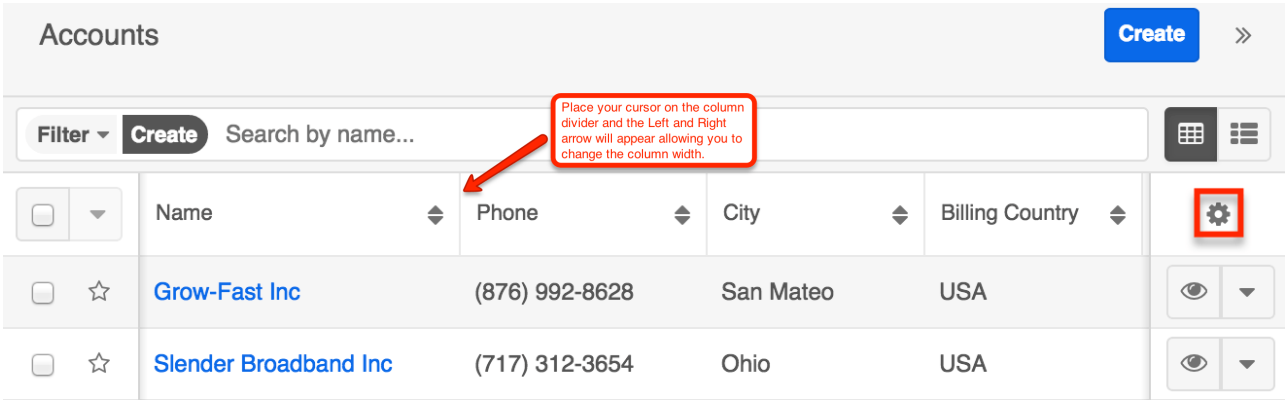
title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the default column order.




## Column Resizing

Users can easily adjust the size of columns in module list views per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the current list view is different from the default column width. Changes to the column width made by administrators in Studio are only respected if the user has not resized the specific column in the list view. The column width set by the user will supersede the default column width configured in Studio until the user resets the list view back to the default widths. For more information on how admins can set column widths, please refer to the Studio documentation in the Administration guide.

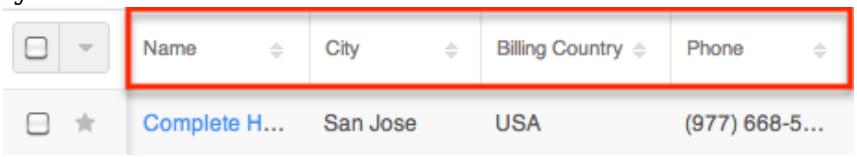
Note: Sugar enforces a minimum width for currency fields (e.g. Best, Likely, etc.) in list view columns which prevents the columns from being collapsed beyond this limit.




## Column Sorting

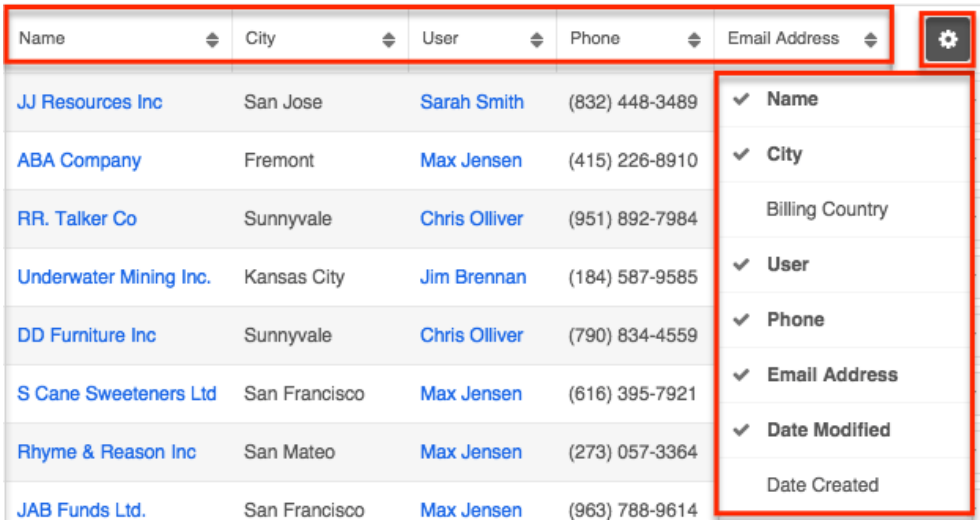
Sugar's list view provides users the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. You can click the column header again to reverse the sort order.

Note: List views may only be sorted by one column at a time and cannot be sorted by custom relate fields.



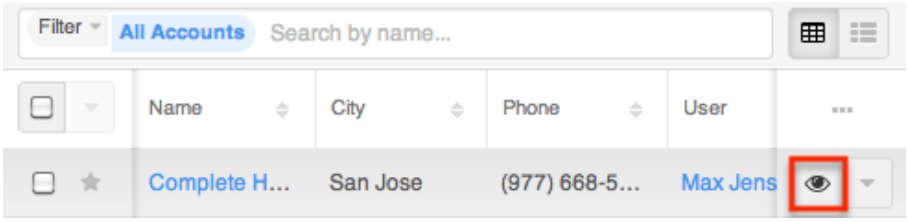

## Column Selection

Sugar gives users the ability to personalize the list view by specifying which fields they want to be displayed in the list view. You can click the Column Selection icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column on your list view. Please note that administrators have the ability to configure what fields are available to display in the list view via Admin > Studio. For more information on configuring fields to display in the list view, please refer to the Studio documentation in the Administration guide.

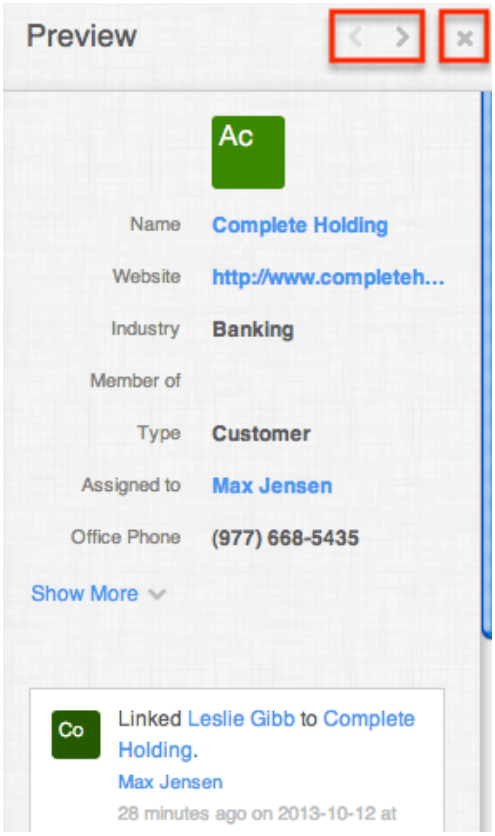



## Preview

Users have the option to preview a record's details directly from the module's list view by clicking the Preview icon to the far right of each record's row.

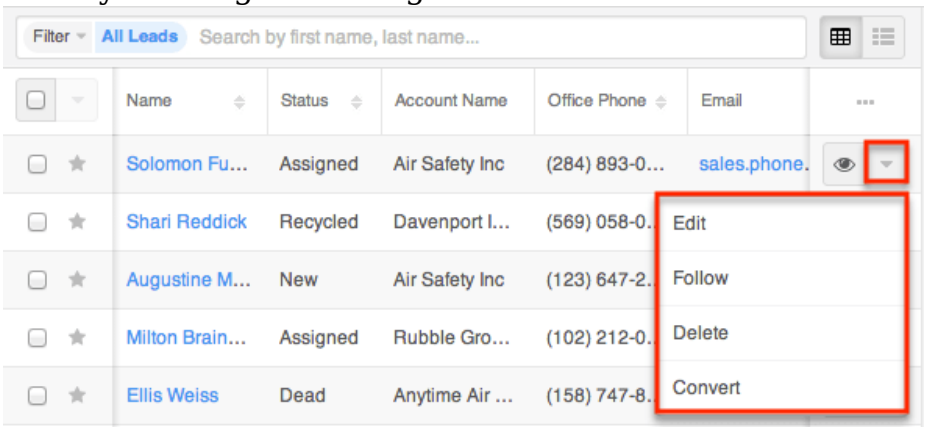



In the preview, Sugar displays the topmost fields from the module's record view and the record's most recent activity stream entries in the intelligence pane. To view all of the fields that are on the record view, click "Show more...". From module list views, left and right arrow buttons at the top of the intelligence pane allow you to preview the next or previous record of the current list. To close a preview, simply click the "X" in the corner of the intelligence pane.




## Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to edit, follow, delete, etc. specific records directly from the list view. For example, users have the ability to inline edit the display column fields directly from the list view by clicking the triangle next to the Preview icon then selecting "Edit".




The options in the Record Actions menu allow you to perform the following operations:

| Menu Item | Description |
| --- | --- |
| | |

| | |
|---|---|
| Edit | Edit this record |
| Follow | Follow this record |
| Delete | Delete this record |
| Convert | Convert this record<br><br>Note: Only available for Leads module |

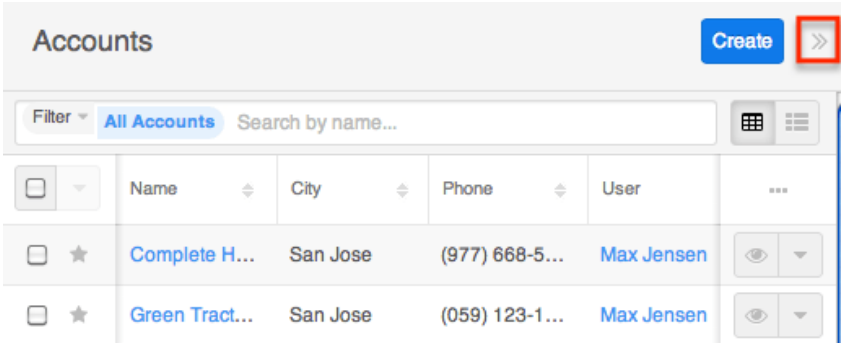
## More Records

The list view loads an initial number of records meeting the current search criteria with the option to show additional results at the users request. By default, Sugar displays 20 records per list view results set, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide. To load the next set of list view results, simply click the More "Module Name" (e.g. More accounts) link at the bottom of the list view.



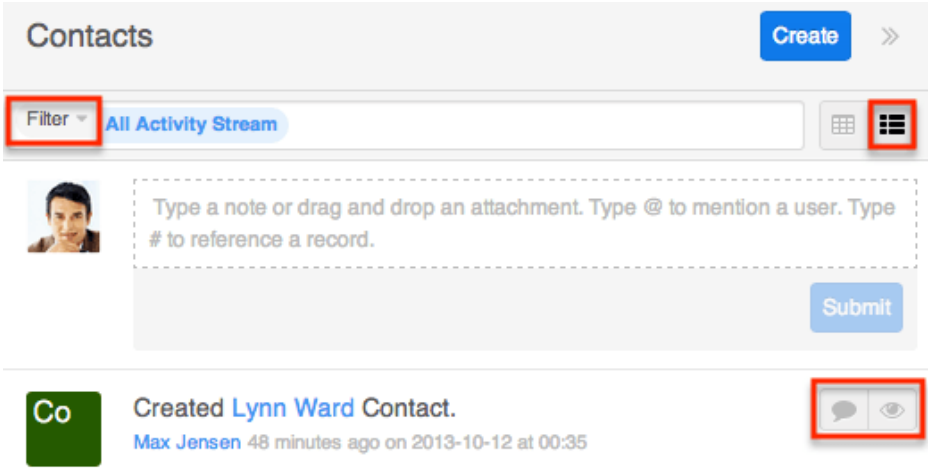

## Right Hand Side Drawer

On the upper right of the module's list view there is a Double arrow icon which allows users to expand the list view to the full screen width. The intelligence pane to the right of the list view will be hidden when the list view is expanded. To reduce the list view's width and reveal the intelligence pane, simply click the Double arrow icon again.




## Activity Stream

The module's activity stream displays user posts made directly via the module as well as record posts relevant to the module record. To view the module's activity stream, simply click the Activity Stream button to the right of the list view's search bar. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts using the comment button to the far right of each post. You can also preview the record referenced in record posts by clicking the Preview button to the right of each post. The activity stream can be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box and selecting the desired message type.



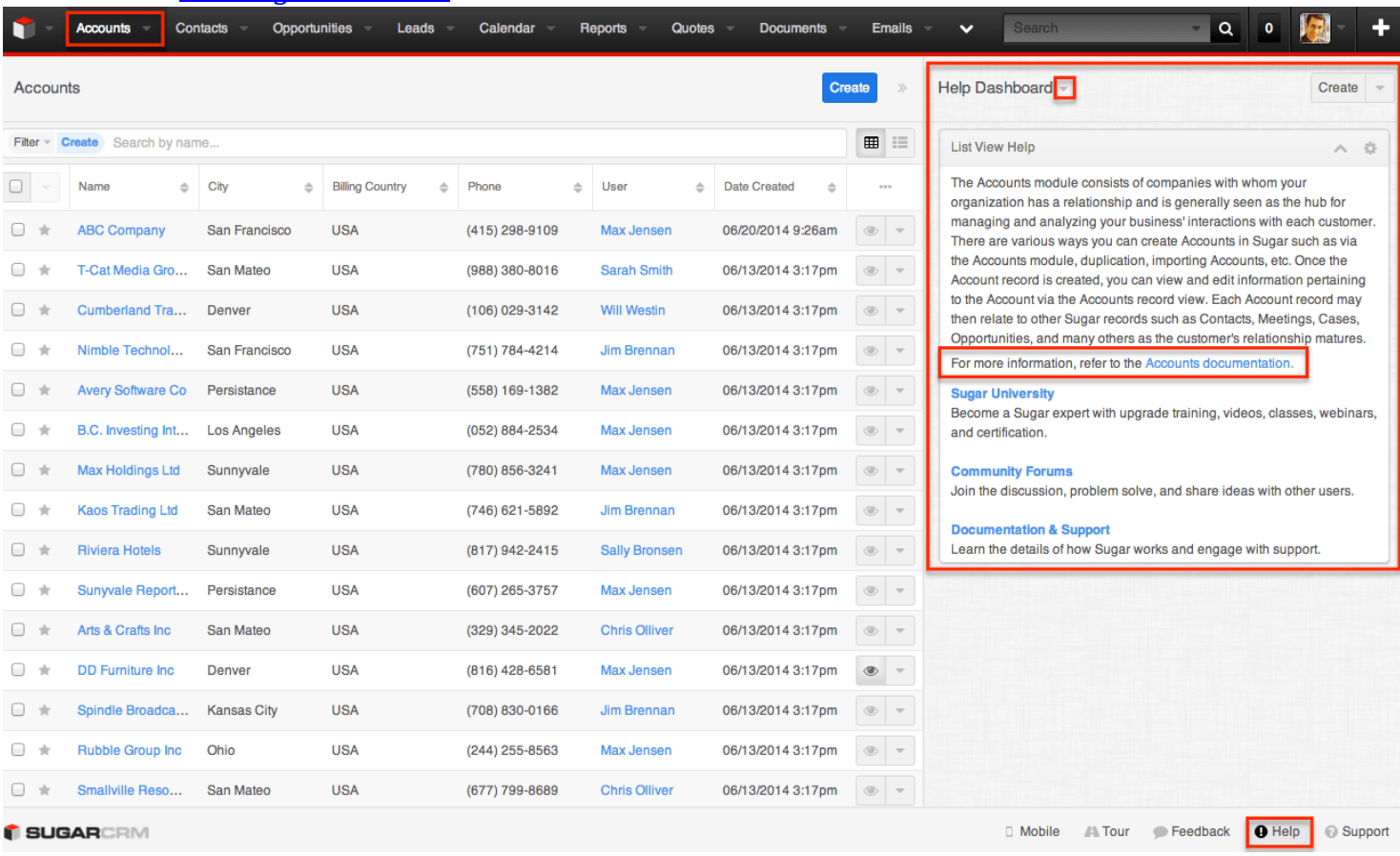

## Intelligence Pane

An intelligence pane displays to the right of the module's list view and provides users with valuable record information via various dashlets. By default, the list view's intelligence pane will display the Help Dashboard to the right of the screen along with the List View Help dashlet. The List View Help dashlet provides users with a brief introduction to the module and includes a link to the corresponding documentation (e.g. Accounts documentation) in the Application guide should you wish to view more information. In addition, you can access the Sugar University, Documentation & Support, and Community Forums websites. These links provide access to additional resources available to users. Simply click the appropriate link from the Help dashlet and the pages will open in a separate tab. Please note that clicking the Help icon in Sugar's footer allows you to toggle between viewing the list view's Help dashboard and hiding it. Simply click the Help icon or select the "Help Dashboard" again from the list view's intelligence pane to revisit the dashboard.

You can access the My Dashboard by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may create other dashboards for use within the specific module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add

additional dashlets (e.g. Saved Reports Chart dashlet, etc.) to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do no wish to view by clicking the Up arrow to the left of the Gear icon. Sugar will remember the state of your intelligence pane the next time you return to the module's list view. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.

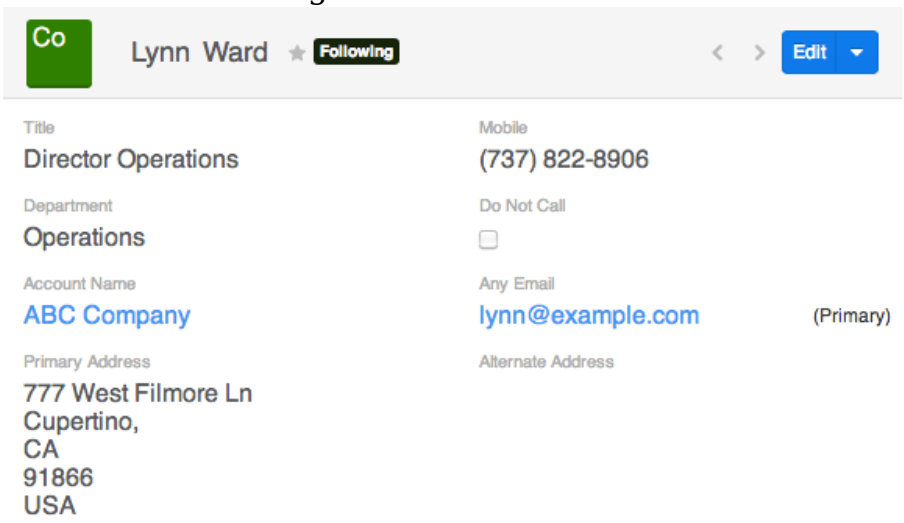



## Record View

The module's record view displays thorough information regarding the record such as name, email address, phone number, etc. Beneath the fields you can toggle between viewing a record's subpanels of related records (e.g. Opportunities, Leads, etc.) as well as the record's activity stream. The record view can be reached by clicking a record's link from anywhere in the application including from the module's list view.

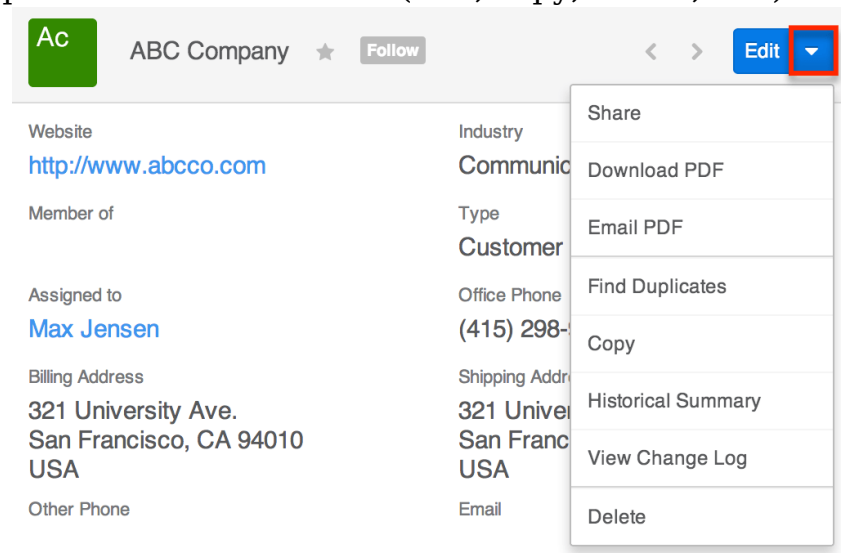
Please note that you will only be able to view a record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation

in the Administration guide. Users with administrator or developer access have the ability to change the record view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.




## Actions Menu

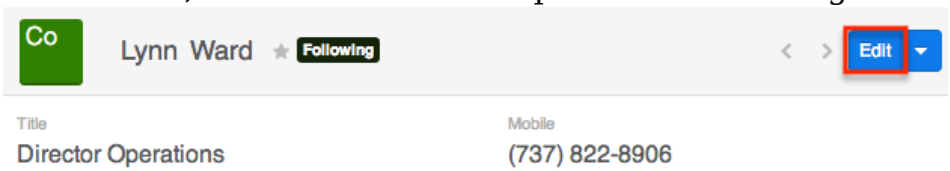
The Actions menu on the top right of each module's record view allows you to perform various actions (edit, copy, delete, etc.) on the current record.




Please note that certain action items (e.g. Convert Lead) in the Actions menu can vary between the various modules. The following sections will cover the most common action items across the modules. For more information on a specific action not listed below, please refer to the record view actions menu section for the specific module's documentation in the application guide.

### Edit

Records may be edited at any time to update or add information to the record. You can make changes to existing records by clicking the Edit button on the upper right of the page. Once the record view is open, update the necessary fields, then click "Save" to preserve the changes made. You can also edit individual fields by clicking the Pencil icon to the left of the field's values. Type or select a new value for the field, then click "Save" to preserve the change.

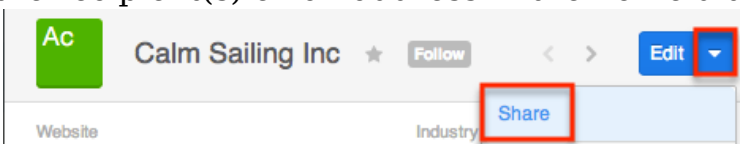



Please note that your ability to edit records in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure the module's record view via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

## Share

Individual records can be shared with other users in your organization by sending an email with the record's link directly from the record view. In the module's record view (e.g. account's record view), select "Share" from the Actions menu which will open a Compose Email window including the URL of the record. Enter the recipient(s) email address in the To field then click "Send"./

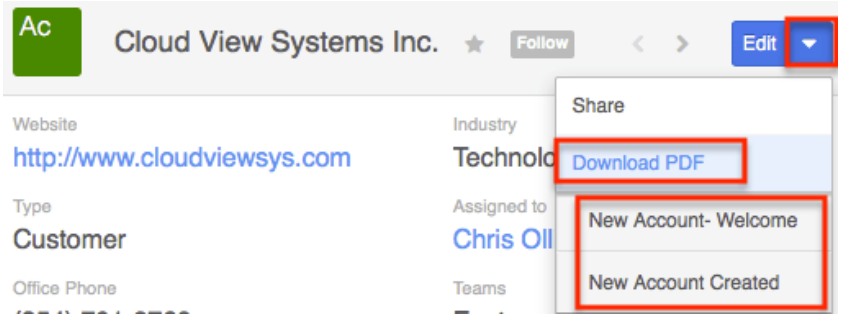



Users can simply click the link in the email to access the record in Sugar. Please note that the user must be logged into Sugar in order to access the record. Users will only be able to view the shared record as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

## Download Information as a PDF

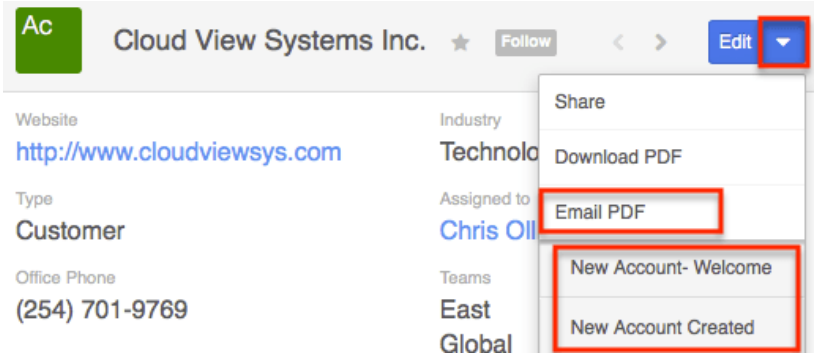
Users have the option to download module information as a PDF file via the record view by clicking the Actions menu and selecting "Download PDF". All PDF

templates which your administrator has created and made available for the module will appear beneath the Download PDF option in the Actions menu. Simply select one of the templates to generate the PDF file to view or save onto your local machine. Please note that the Download PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.

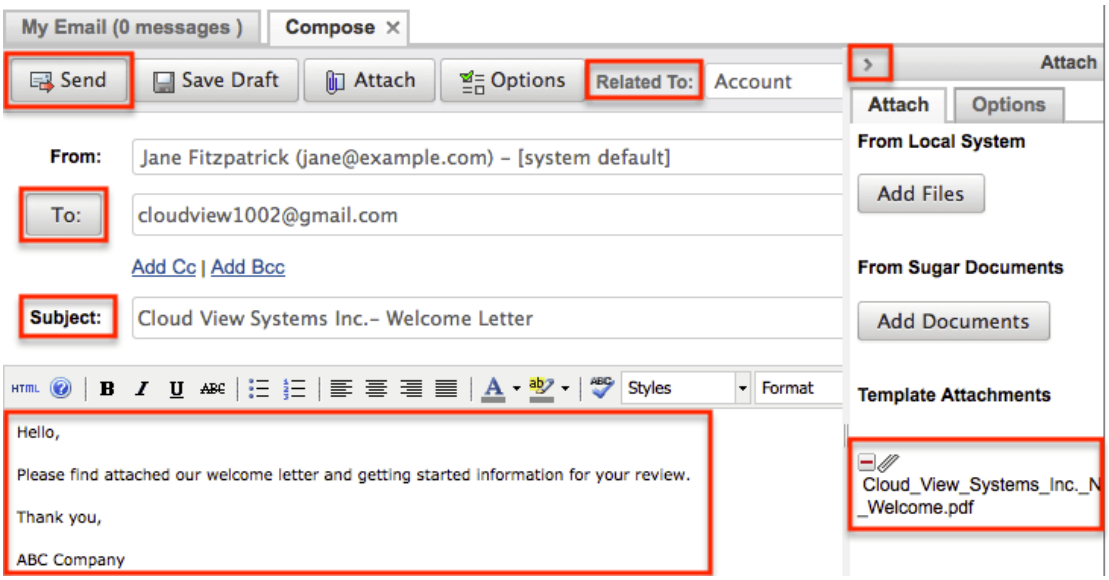



Email Information as a PDF

Users also have the option to email module information as a PDF file using any of the available PDF module templates using Sugar's email client. Simply click the Actions menu and select "Email PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Email PDF option in the Actions menu.




Select one of the templates to open a Compose window in the Emails module. The email's To field will automatically populate with the email address of the record, and the Subject field will display the record's name. The email is automatically related to the record, and the chosen PDF will be attached. You can update the fields as necessary and enter a body for the email message then click "Send". For more information on sending emails via the Emails module, please refer to the Emails documentation.




Please note that the Email PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.

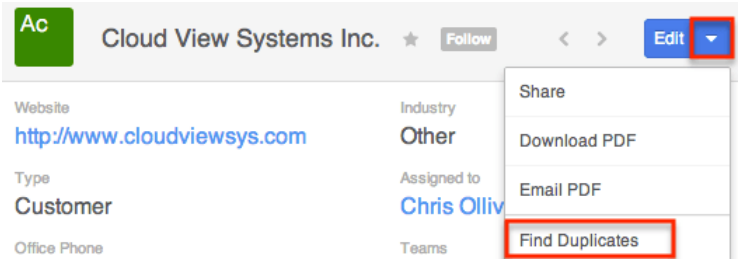
## Find Duplicates

Between multiple users working in Sugar, importing new records, and converting leads, it is possible for duplicate records to be accidentally input to the system. Before creating a new record, a good practice is to first check that the record does not already exist in Sugar. You can locate duplicate records for cleanup using module search from the list view. Searching for records with similar names or other information can turn search into a powerful, duplicates-finding tool. Sugar also provides a wizard for finding potential duplicates that is available from the record view and may be used as shown below. If duplicate records are detected, you can perform a merge per the Merging section of this documentation.

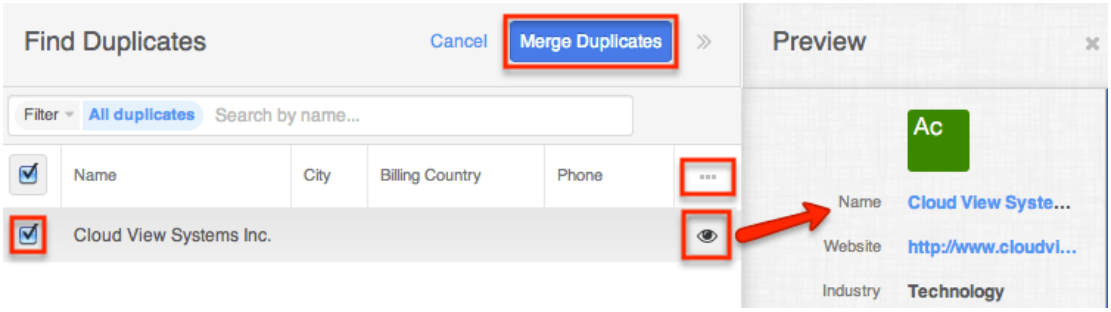
Please note that your ability to use the Find Duplicates action may be restricted by any role which prevents record deletion. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Find Duplicates option.

Use the following steps to locate duplicate records using the Find Duplicates option from the record view:

1. Navigate to a record view.
2. Choose "Find Duplicates" from the Actions menu.




3. Potential duplicate records will be listed on the Find Duplicates page. Select the duplicate record(s) you wish to merge then click "Merge Duplicates".
    - You can preview the duplicate record's details by clicking the Preview button to the far right of the records row.
    - You can search for specific records from the list view if you wish to check for more possible duplicates. For more information on performing a search, please refer to the Module Search section of this documentation.
    - You can also click the Column Selection icon above the Preview button to change the list of fields that display on the list view column headers.

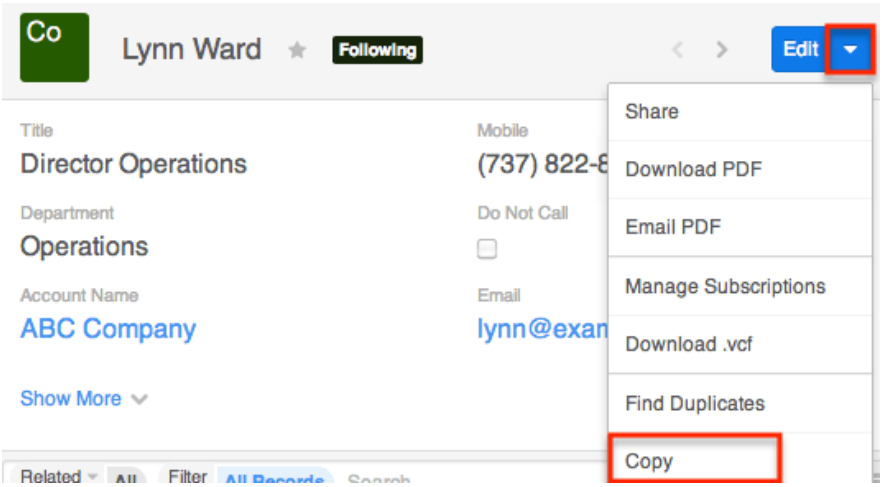



Once you click "Merge Duplicates", the merging process with the current record will begin. For instructions on performing the merge that follows, please refer to Steps 3-8 of the Merging Via List View section of this documentation.

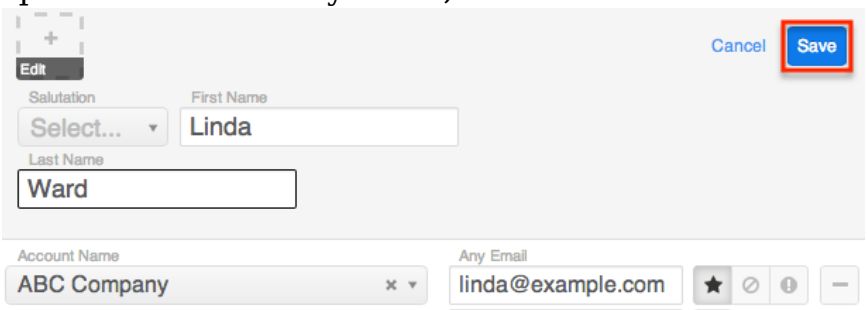
Copy

Users can create new record's by duplicating an existing record from the record view. The copy option is useful if the record you are creating has similar information to an existing record. Please note that related records to the original record will not be copied to the newly created record.
The following steps cover creating a contact by duplicating an existing record as an example:

1. Navigate to a contact's record view.
2. Click the Actions menu and select "Copy".

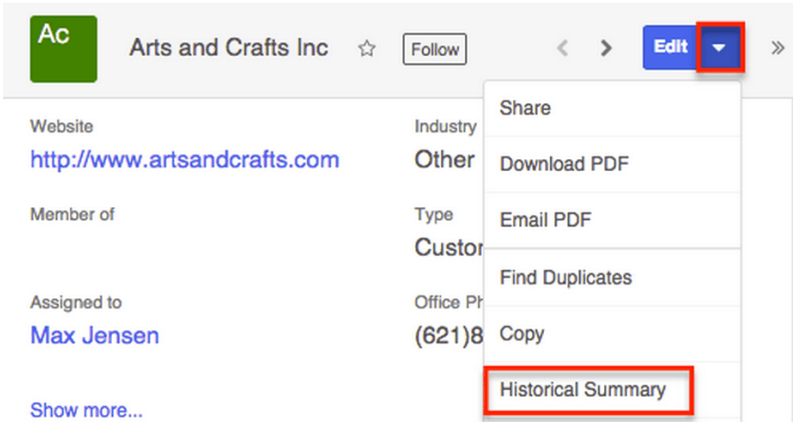



3. The displayed record view is pre-populated with the original contact's values. Update the necessary fields, then click "Save".




Historical Summary

Users can easily view quick details for the various related activities (e.g. calls, meetings, notes, emails, etc.) that have taken place via the Historical Summary option. Simply navigate to the module's (e.g. Accounts) record view and select "Historical Summary" from the Actions menu to view the historical activities related to the record in one place.

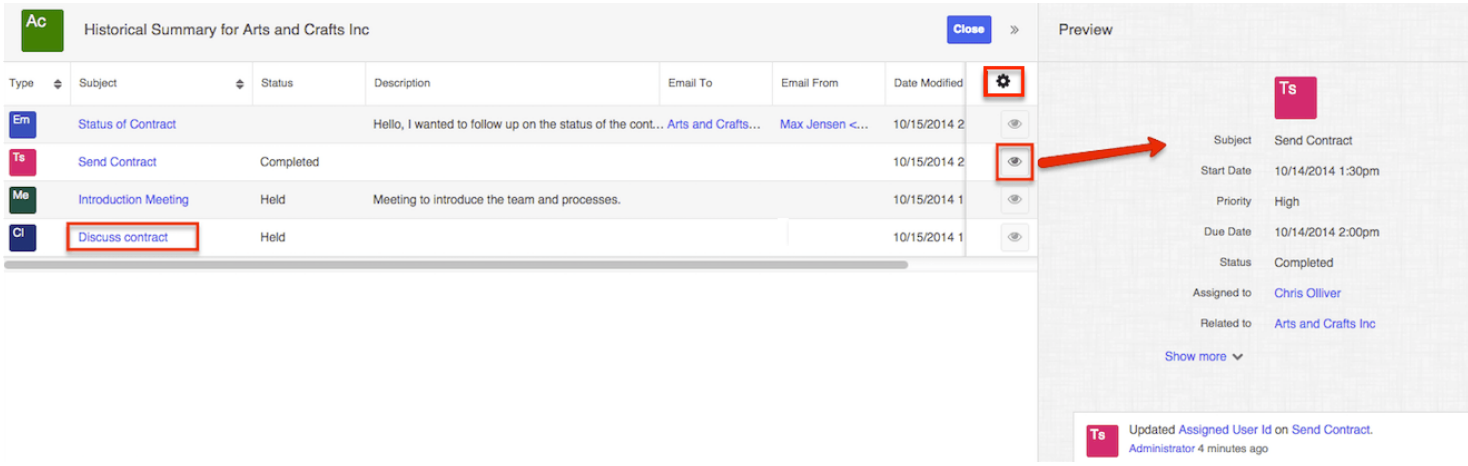



The Historical Summary page will display each activity's subject, type, status, date created, etc. and you can simply click the activity's name to view the full details for each activity. You can also preview the activity record via the intelligence pane by

clicking the Preview icon to the far right of each record's row. It will provide users with key information regarding the record as well as the related activity stream information (if any). For more information on activity streams, please refer to the documentation. Please note that preview is only available for modules (e.g. Task, Note) using the Sidecar user interface.

The historical summary list view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the system's default column order.

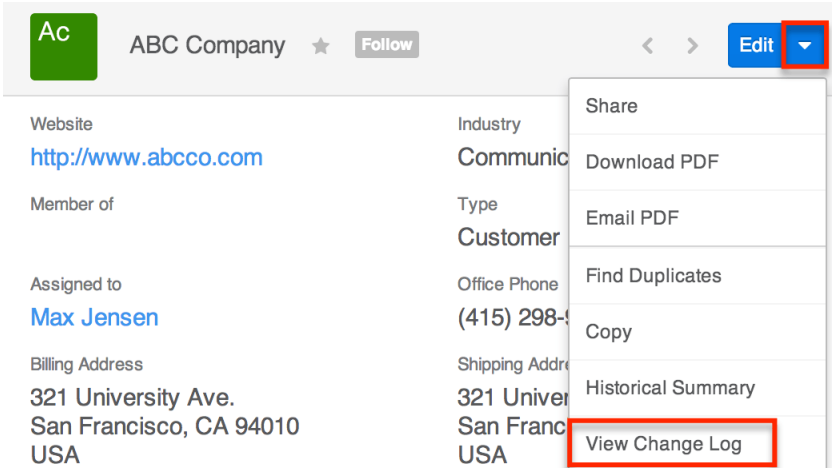
Users can also easily adjust the size of columns in the historical summary list view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the Historical Summary list view is different from the default column width.




View Change Log

Changes made to each record are tracked over time, and for most modules users are able to view the history of changes via the change log in each record view. To view the change log, navigate to a module's record view and select "View Change Log" from the Actions menu. Please note that only fields marked as "Audit" in Admin > Studio will be displayed in the change log. For more information on

designating a field for audit, please refer to the Studio documentation in the Administration guide.



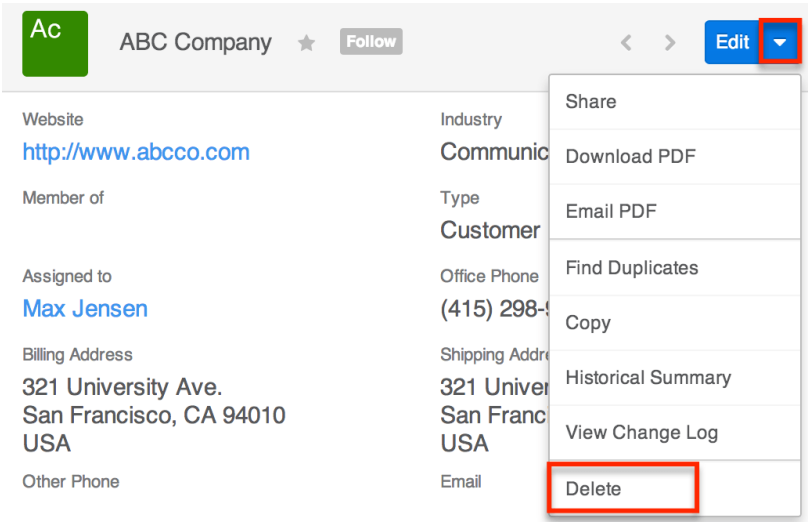

Delete

Users have the ability to delete record's that are invalid or should no longer appear in their organization's Sugar instance via the module's record view. Deleting via the record view allows you to delete a single record in the module. Please note that deleting records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

Please note that your ability to delete records in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

The following steps cover deleting an account record from the Accounts record view as an example:

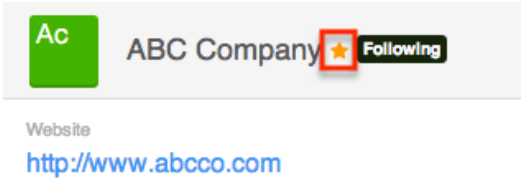
1. Navigate to an account's record view.
2. Select "Delete" from the Actions menu.




3. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

## Favorite Designation

Users have the option to mark records as favorites via the module's record view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the module tab. In the module's record view, the star to the right of the record's name is orange once favorited.

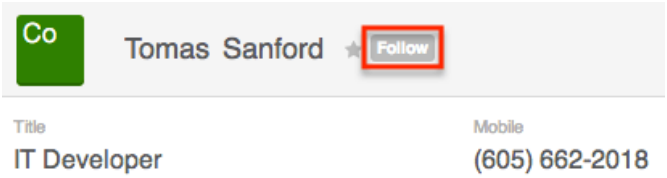



## Following Designation

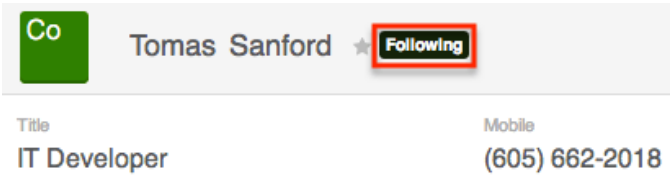
Users can also choose to follow specific records to which they have access to in Sugar by clicking the Follow button (If grayed out) to the right of the record's name. The ability to follow records allows each user to personalize their activity stream by specifying which records' posts should appear on the activity streams displayed on their Home page and module list view. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. Should a user lose access to a record in Sugar, they will automatically stop following that record.

The following steps cover marking a record to follow via the Contacts record view:

1. Navigate to a Contacts record view.
2. Click the Follow button to the right of the contact's name.




3. To unfollow the contact, click the Follow button again to revert it to gray.




## Next or Previous Record

On the upper right of the record view, there are two buttons that allow you to page through each record in the module's list view's current search results. Clicking the Left arrow button displays the previous record of the current search results while clicking the Right arrow button displays the next record of the current search results.




## Twitter Connector

Sugar comes with built in connectors to external data sources to enable you to connect your Sugar data to common social media platforms (e.g. Twitter). These integration's can help to bring you closer to your customers and partners using social media. For more information on what connectors are available and how to enable and configure them, please refer to the Connectors section in the System documentation of the Administration guide.

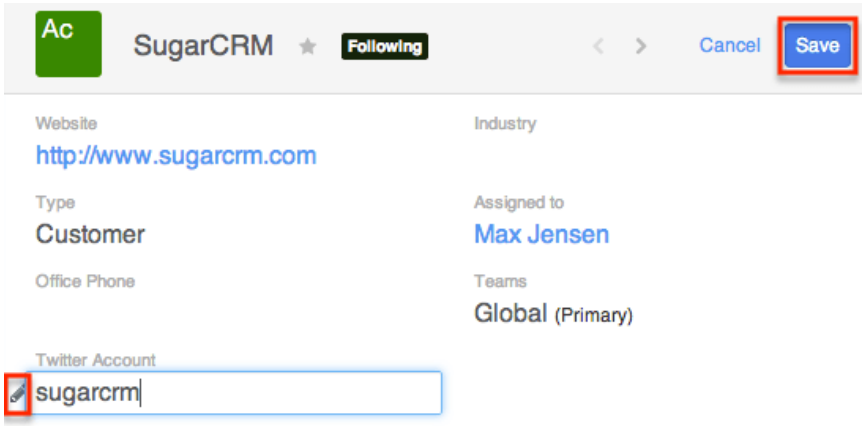
Users can view and access twitter feeds in Sugar as follows:

- Add and share twitter feeds via Sugar's Activity Streams
- View twitter feeds via the Twitter dashlet on Sugar's Home page and Intelligence Pane

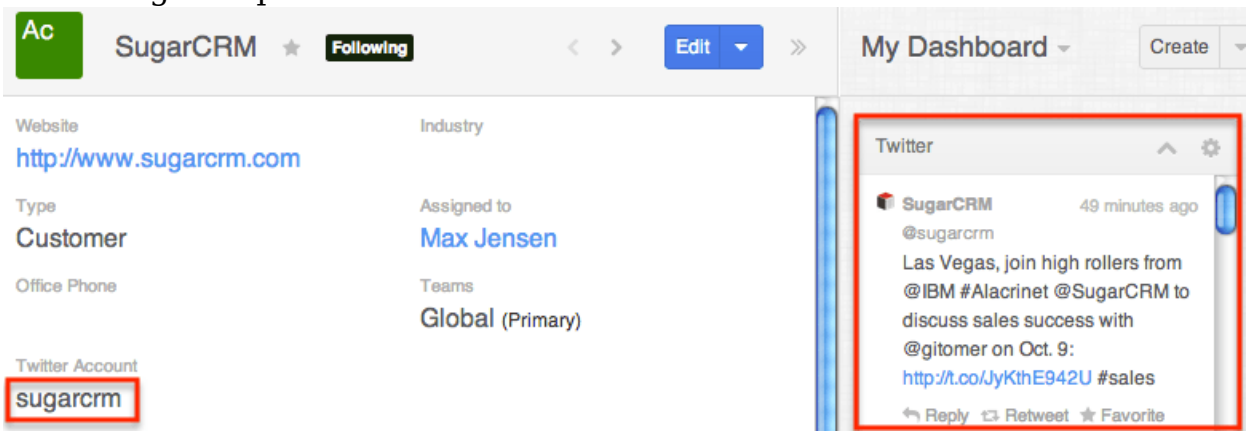
Please note that administrators must first configure the Twitter connector before users can view twitter feeds via the Twitter dashlet. For more information on how

to configure the Twitter connector, please refer to the Connectors section in the System documentation.
The following steps cover adding the Twitter ID to view feeds via the Account record views intelligence pane as an example:

1. Navigate to an account record view's intelligence pane and verify that the Twitter dashlet is there.
    - If the Twitter dashlet is not displayed in the intelligence pane, you can add the dashlet by editing the dashboard. For more information on adding dashlets, please refer to Adding Dashlets section of the Intelligence Pane documentation.
2. View the record's details and locate the Twitter Account field. Click the Pencil icon to the left of the Twitter Account field and enter in a Twitter ID. Click "Save" to preserve the change.
    - If the Twitter Account field is not available on the record view, administrators must add the field via Admin > Studio. For more information on adding fields to layouts, please refer to the Studio documentation.




Once the Twitter ID is saved on the record view, navigate to the Twitter dashlet in the intelligence pane to view the associated twitter feeds for the account.




Please note that if the Twitter ID is not entered in the Twitter Account field, then

the Twitter connector will try to pull feeds by finding a match based on the record's name (account name, contact name, etc.). Also, if there is a custom field to Twitter, the Twitter Account field will still be verified first to see if there is a valid Twitter ID and the Twitter dashlet will pull feeds using this account. If the Twitter Account field is blank, then it will check the custom field that is mapped and pull feeds based on the Twitter ID entered. If both fields are blank, then it will check the record's name to try and find a matching account to pull twitter feeds. For more information on mapping connector fields, please refer to the System documentation in the Administration guide.

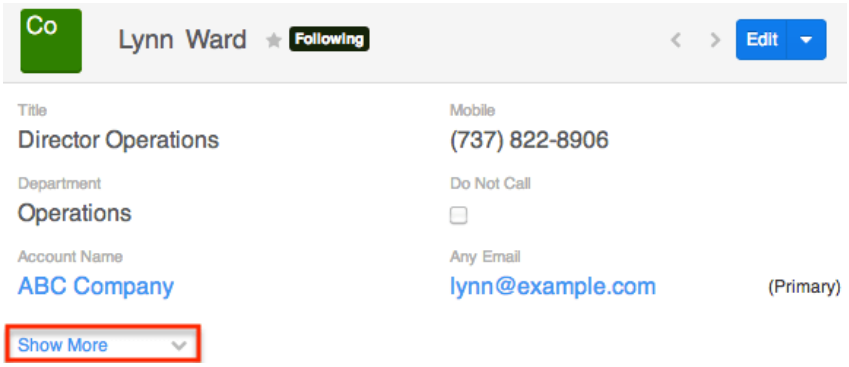
Twitter dashlets on the Home page and module's list view need to have a valid Twitter ID associated in order to display the feeds. Simply click the Gear icon on the upper right of the dashlet, select "Edit", and enter the appropriate Twitter ID. Save the change and the corresponding twitter feeds will display in the dashlet.

## D&B Connector

The D&B connector allows users to search, view, access, and import key information for companies via various D&B dashlets in the Account record view's intelligence pane. Please note that administrators must first configure the D&B connector via Admin > Connectors before users can utilize the dashlets in the Accounts module. For more information on how to configure the D&B connector, please refer to the Connectors section in the System documentation of the Administration guide. Once the connector is enabled, users can add the appropriate D&B dashlets to the account record view's intelligence pane. For more information regarding the various dashlets available to add, please refer to the D&B Dashlets section in the Intelligence Pane documentation.

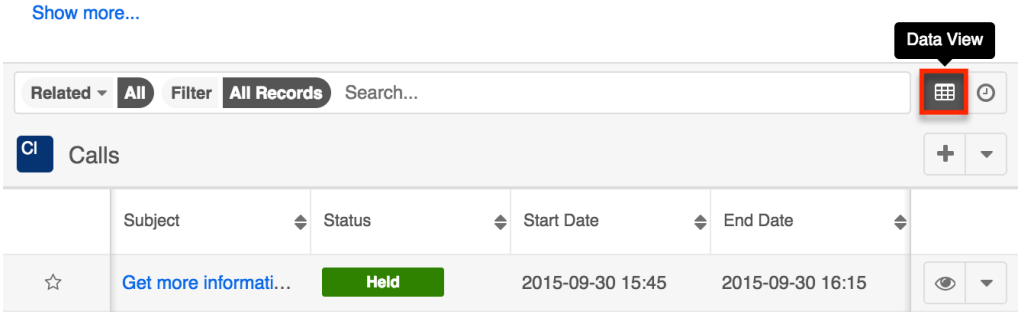
## Show More

The record view typically displays a few key fields (e.g. website, mobile phone, office phone, etc.) on the business card panel with the option to view more fields by clicking the Show More link on the bottom left. Please note that administrators can configure what fields appear on the business card panel via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.




## Subpanels

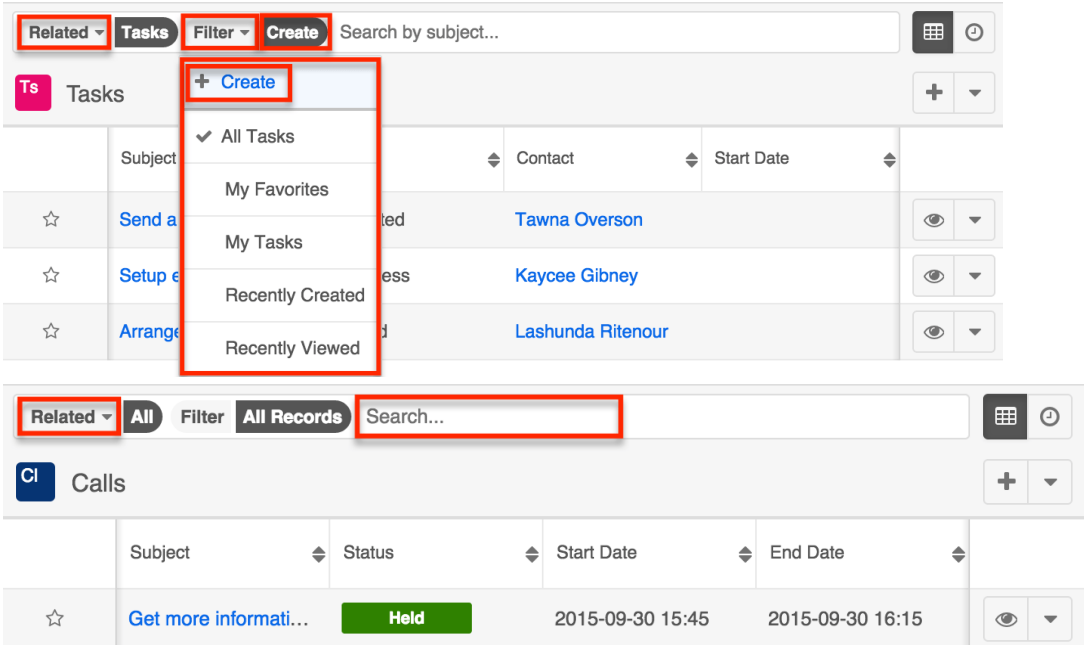
Beneath the module (e.g. Accounts) record's fields are subpanels containing related records from various modules (e.g. Contacts, Leads, Opportunities, etc.). You can create a related record as well as link an existing record directly from the subpanel. Once the records appear within the subpanel, users can preview the record's detail and edit the record's data directly from the record view. Please note that the subpanels are viewable when you access the Data View section of the module's record view.




### Filter Options

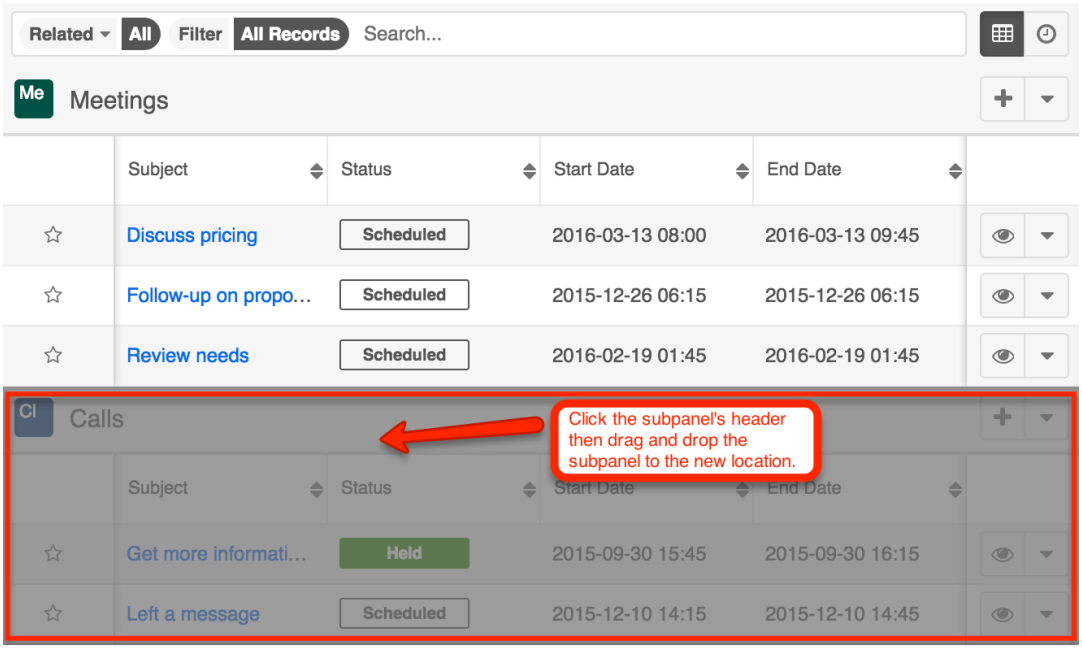
While in Data View, all of the module record's related records will be displayed beneath the record's fields. Users have the ability to search for records which appear in the subpanels as well as filter the view to only display a specific module (e.g. Leads, Contacts, etc.). To locate a record by name, enter the keyword into the Search bar, and the subpanel(s) with the matching record(s) will appear below. To filter, simply click the Related option to the far left of the Search bar and select the module whose subpanel you wish to view. Filter and search may be combined to only display matching records within a selected module. To see all subpanels to which you have access, simply select "All" in the Related options and remove any text from the search bar. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the page. In addition, searches using the open Search box only or in combination with advanced filters (e.g. My Favorites) are preserved when you navigate away from the page.

When a Sidecar module (e.g. Contacts, Leads, Tasks, etc.) is selected from the Related options, you have the option to filter the related subpanels further using one of the available options (e.g. My Favorites, Recently Created, etc.). Please note that you can also create custom filters for related Sidecar modules. Once the related module (e.g. Contacts) is selected, either click the Filter option and select "Create" or click "Create" to the right of the Filter option.




## Reordering Subpanels

Users can easily move subpanels to a new location on the record view by dragging and dropping the subpanel's header. The new subpanel order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared.




Related Record Subpanels

The most common type of subpanels displayed on a module's record view contain the related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. For example, an account may be related to multiple contacts which means that the related contacts will be displayed in a subpanel beneath the fields.

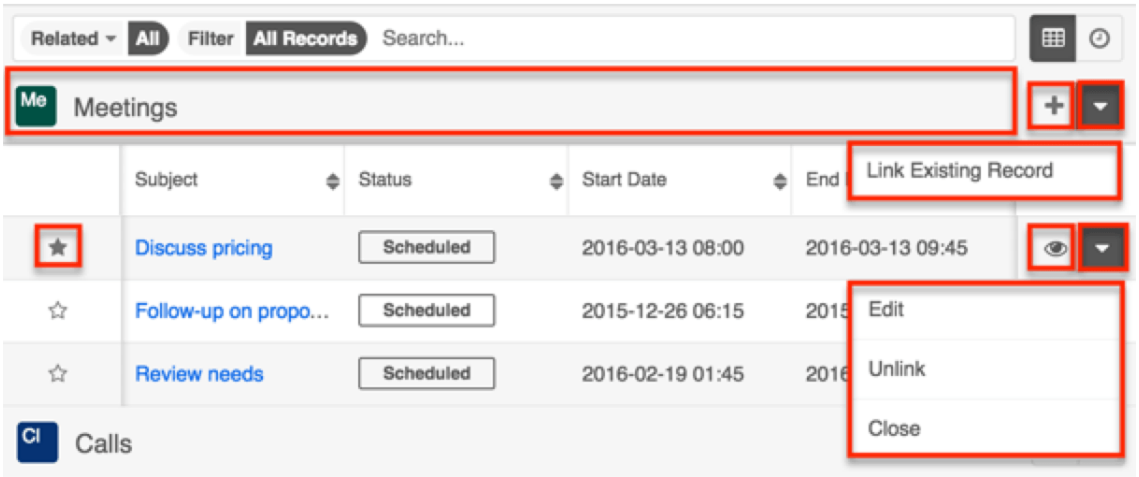
Users with administrator or developer access have the ability to change the fields (e.g. Name, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.

Related record subpanels allow the following operations to be performed:

- To view the details of a related record, click the record's name in the subpanel to open it in record view.
- To relate an existing record, choose "Link Existing Record" from the subpanel's Actions menu, then locate and select the desired record. Please note that the Link Existing Record option is not available when the relationship is required in the related module (e.g. Account Name field in Opportunities).
- To relate a new record, click the Plus button to the left of the Actions menu, then complete the record view layout and click "Save".
- To inline edit the record directly from the subpanel, choose "Edit" from the

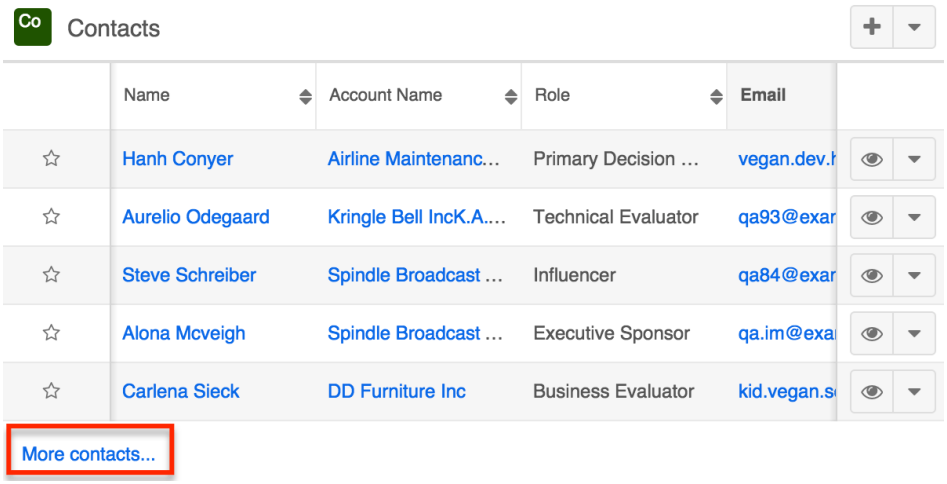
Actions menu on the far right of the record's row and click "Save" to preserve the change.

- To preview the record, click the Preview button to the far right of the record's row. The record's details will display to the right of the module's record view.
- To delete an existing relationship to a record, choose "Unlink" from the Actions menu on the far right of the record's row. This removes the relationship, but does not delete the record itself. Please note that the Unlink option is not available when the relationship is required in the related module (e.g. Account Name field in Opportunities).
- To mark the record as a favorite, click the star icon to the left of the desired record's row.
- To collapse or expand the subpanel, click anywhere on the subpanel's header.
- To change the column size in the subpanel, place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. For more information on resizing columns, please refer to the Column Resizing section of this documentation.
    - Sugar enforces a minimum width for currency fields (e.g. Best, Likely, etc.) in list view columns which prevents the columns from being collapsed beyond this limit.
    - Note: The subpanel column width will not be preserved when you navigate away from the page.



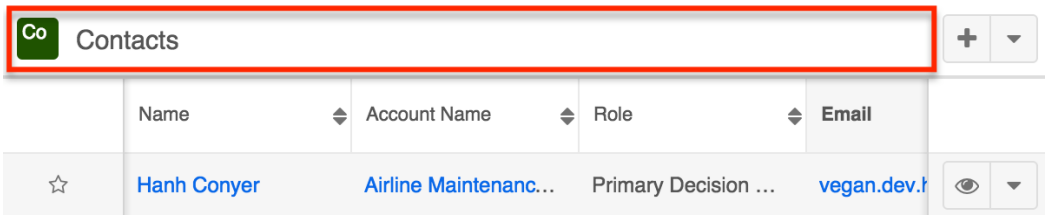

More Records

The subpanel will display a set number of records based on the number of subpanel items set via Admin > System Settings, By default, Sugar displays 5 records per subpanel results set, but administrators can change the number of records displayed. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide. To load the next set of records in the subpanel, simply click the link (e.g. More contacts) on the bottom left of the subpanel.



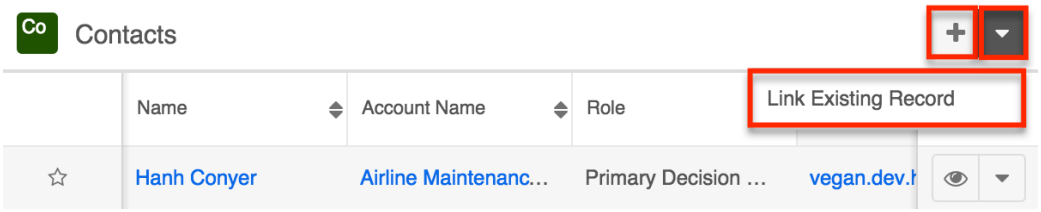

## Collapse and Expand

Subpanels in the record view can be collapsed to hide the information within by clicking anywhere on the subpanel's header. To expand the subpanel, simply click the header again.




## Actions Menu

The Actions menu in the subpanel allows users to either create a new record or link an existing record to relate to the current record you are viewing. To relate a new record to the current record you are viewing, click the Plus button to the left of the Actions menu. This will reveal a Quick Create drawer that overlays the current page. Complete the record view layout and click "Save". To relate an existing record, click the triangle to the right of the Plus button then select "Link Existing Record". On the following page, search and select the record you wish to relate to the current record.

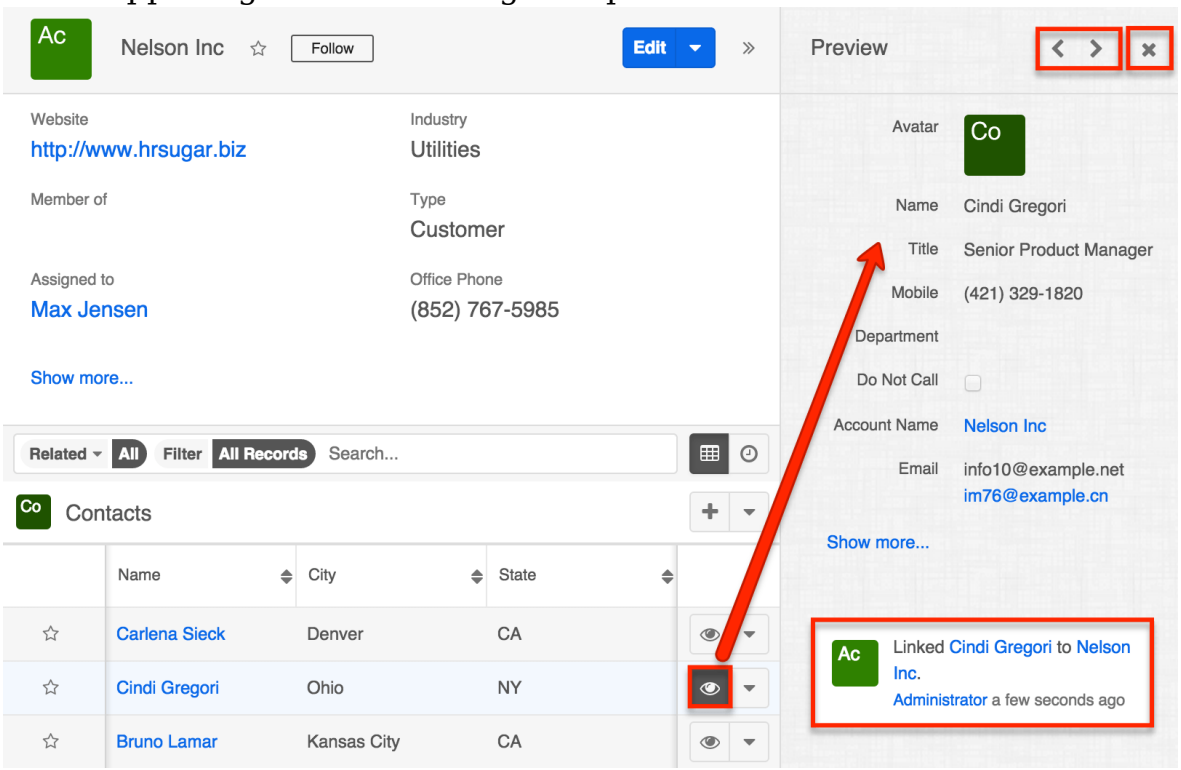



Note: Because a Quick Create drawer overlays the page from where it is launched, using the browser's back button will appear to send you back two pages instead of

to the previous view. To return to the previous view, use the Quick Create form's Cancel option instead.

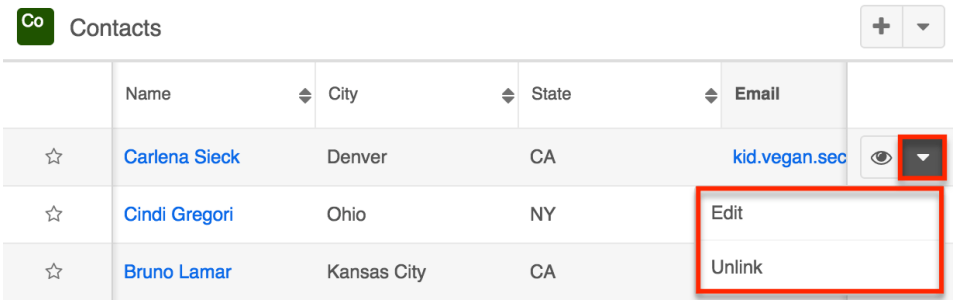
## Preview Button

Users have the ability to preview records in the subpanel directly from the record view. To preview a record's detail, simply click the Preview button to the far right of the record's row in the subpanel. The record's data will display to the right of the record view providing key information regarding the record as well as the related activity stream information. On the upper right of the intelligence pane, there is a Left and Right arrow button that allows you to scroll through and preview the record's currently in the subpanel. To close the preview, click the "X" on the upper right of the intelligence pane.



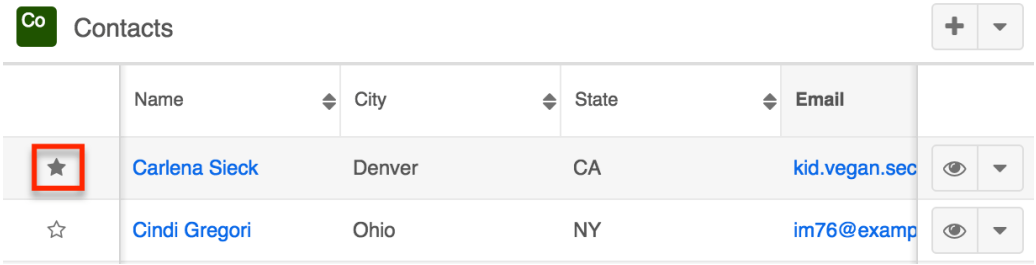

## Record Actions Menu

The Record Actions menu to the right of the Preview button allows users to edit or unlink specific records directly from the subpanel. Selecting "Edit" from the Record Actions menu allows you to edit the record directly from the subpanel and save the changes. You can also delete an existing relationship to a record by selecting "Unlink" from the Record Actions menu. Please note that this removes the relationship, but does not delete the record itself.



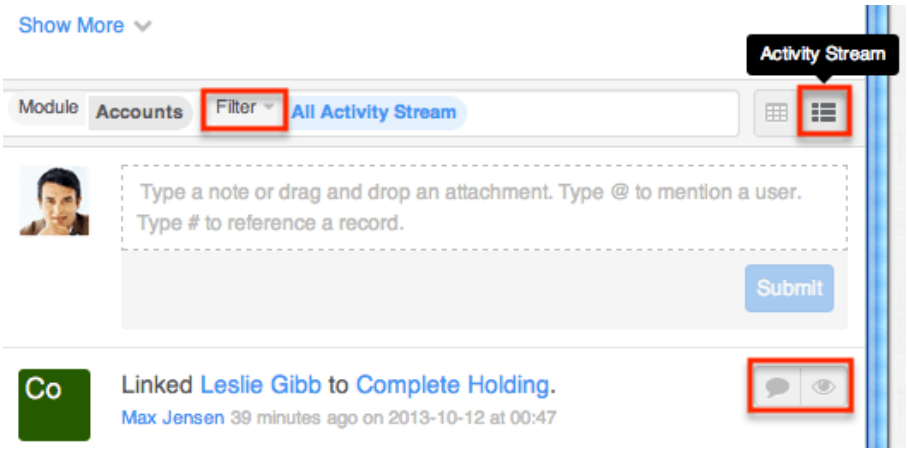

Favorite Designation

Users have the option to mark records as favorites via the subpanels in the record view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the module tab. To mark a record as a favorite, click the star to the left of the desired record's row in the related record subpanel. To remove the record as a favorite, simply click the star again to revert it to white.




## Activity Stream

The record view's activity stream displays user posts and record posts specific to the individual module record. To view the record's activity stream, simply click the Activity Stream button below the record's fields. Users can view all posts in the record view's activity stream even if they do not follow the record in Sugar. Please note that you must follow the record if you wish to view the record view posts via the Home page or List View activity stream. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts by clicking the Comment button to the far right of each post, entering in your comment, then clicking "Reply". You can also preview the record referenced in the record post by clicking the Preview button. The activity stream can also be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box then selecting the desired message type.



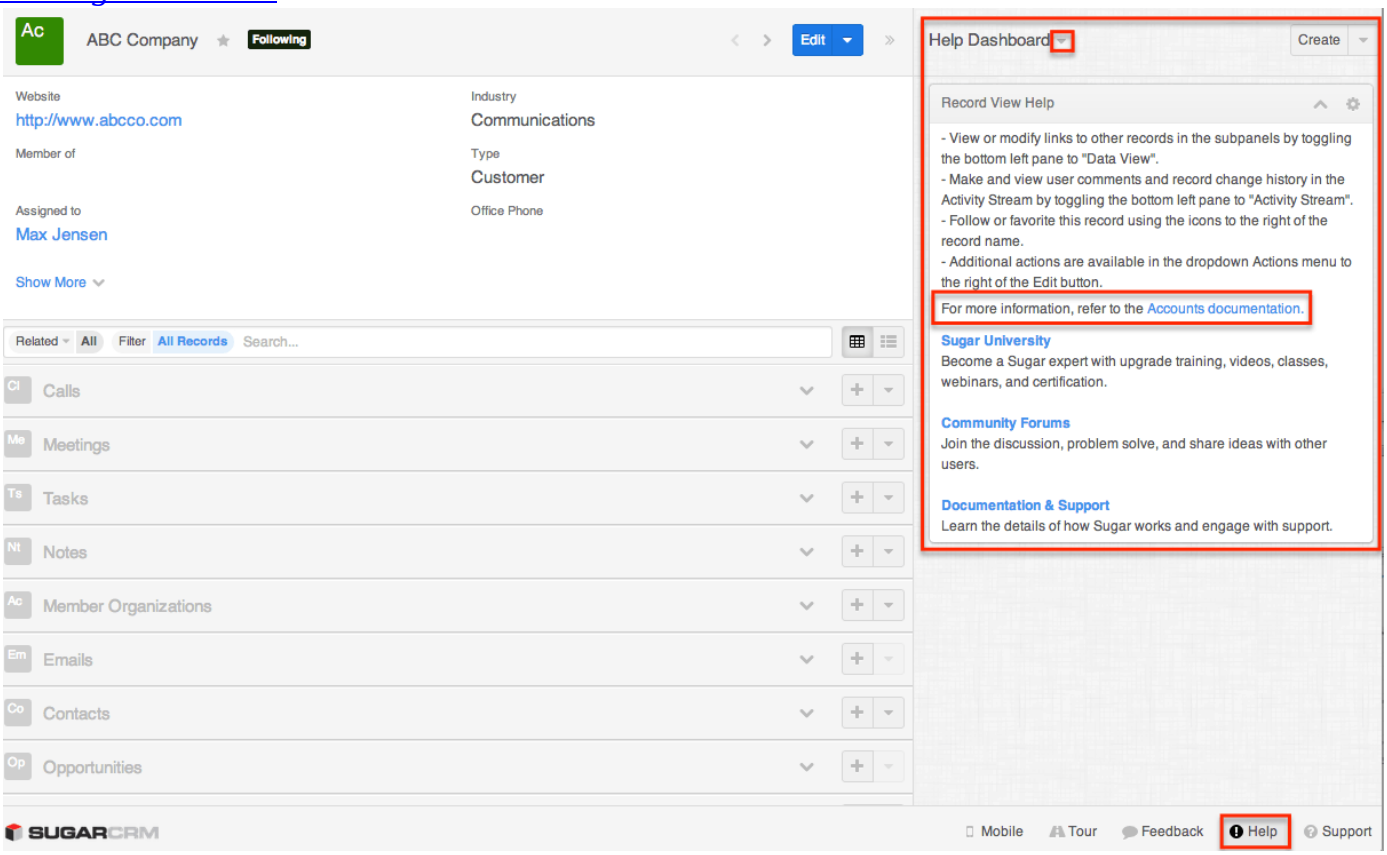

## Intelligence Pane

An intelligence pane displays to the right of the record view and provides users with valuable information (e.g. activities) specific to the record. For example, the Planned Activities dashlet provides upcoming activity information (e.g. calls, meetings) for the record. By default, the Help Dashboard displays to the right of the screen along with the Record View Help dashlet. The Record View Help dashlet provides users with a brief introduction to the module along with some instructions to help users utilize the record view. To access the corresponding documentation in the Application guide, simply click the documentation link (e.g. Accounts documentation) in the dashlet. In addition, you can access the Sugar University, Documentation & Support, and Community Forums websites. These links provide access to additional resources available to users. Simply click the appropriate link from the Help dashlet and the pages will open in a separate tab. Please note that clicking the Help icon in Sugar's footer allows you to toggle between viewing the record view's Help Dashboard and hiding it. Simply click the Help icon or select the "Help Dashboard" again from the record view's intelligence pane to revisit the dashboard.

You can access the My Dashboard by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". The My Dashboard will display some stock dashlets (e.g. Planned Activities dashlet, History dashlet, etc.) by default, and users can add additional dashlets if they wish by editing the dashboard. Clicking the Create button will allow users to create new dashboards to group different sets of dashlets together.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do not wish to view by clicking the Up arrow on the upper right of the dashlet or selecting the Minimize option under the Gear icon. Sugar will remember the state of your intelligence pane the next time you return to the module. For more information on editing,

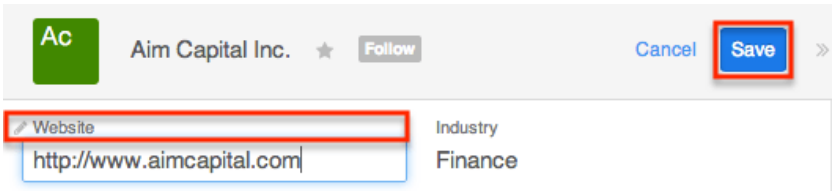
creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.




## Editing Records

Records may be edited at any time to update or add information to the record. You can make changes to existing records by clicking the Edit button on the upper right of the record view. Once the record view is open, update the necessary fields, then click "Save" to preserve the changes made. You can also edit individual fields by clicking the field name. Fields which are available for inline editing will display a pencil icon when hovering on the field name or value. This will allow you to type or select a new value and you can click "Save" to preserve the changes made to the field. In addition, users can edit via the list view by clicking the triangle to the far right of the record's row then selecting "Edit".

From record view:




From list view:




Please note that your ability to edit records in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

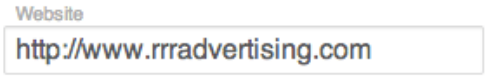
Administrators in Sugar have the ability to configure record views via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

## Editing Common Fields

There are various types of stock fields available out-of-the-box in Sugar. The record view will display a select number of these stock fields by default, but administrators have the ability to change the fields and configure the layout via Admin > Studio. For more information on configuring record view layouts, please refer to the Studio documentation in the Administration guide.

The following are the most common field types (e.g. text, number, dropdown, etc.) in Sugar:

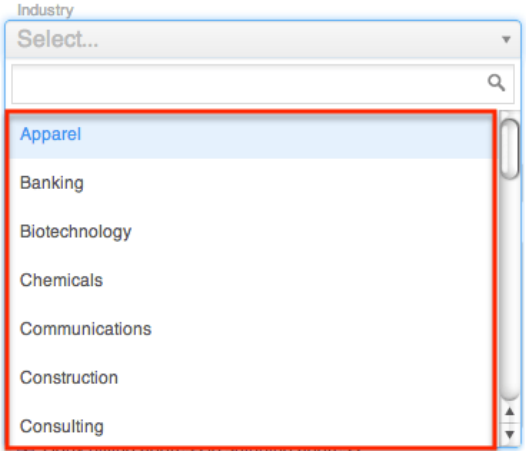
- Text Field : Allows users to enter any alphanumeric characters (e.g. ABC Company, Services 123, etc.) into the field.
  Note: Administrators can place a maximum character length restriction via Admin > Studio, which will only allow users to enter characters up to the specified limit in the text field. Please reach out to the administrator if the maximum character limit needs to be increased.

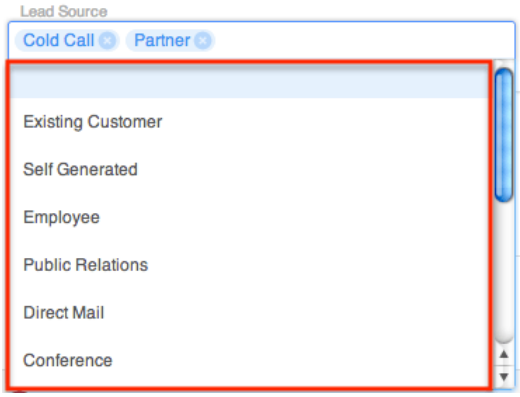
- Integer : Allows users to enter number values (e.g. 850) into the field.
  Note: Administrators can specify a minimum and maximum value for the field, as well as make it a required field via Admin > Studio.

- Dropdown : Allows users to select from a pre-defined list of values. Please note that only one selection is allowed in a dropdown field.



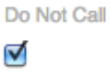

- Multiselect : Allows users to select from a pre-defined list of values. Please note that more than one selection is allowed in a multiselect field.




- Radio : Provides a list of values where the user can choose a radio button to select a value.




- Checkbox : Provides a boolean type typically used to answer a Yes or No question.

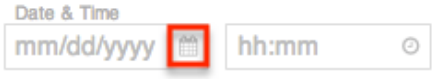



## Editing Date and Time Fields

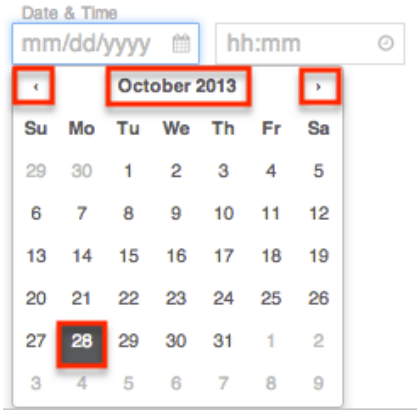
Sugar also has Date and Datetime type fields that allow users to select the date as well as the time via the date picker and dropdown field options.

The following will go over editing a Datetime field:

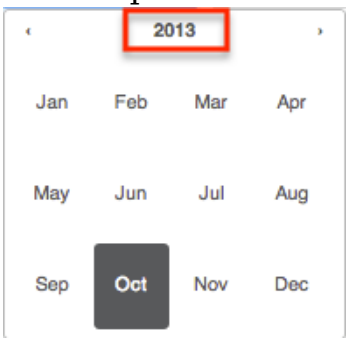
1. Click the Calendar icon within the Date field in order to open the date picker.



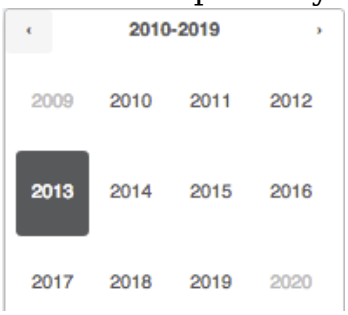

2. Click a day on the pop-up calendar to enter that date into the Datetime field. Use the Left and Right arrow at the top of the calendar to go back or forward a month.



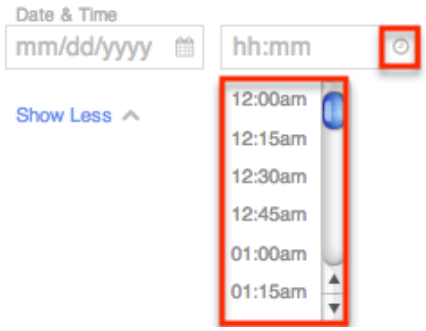

3. To set a specific month and year, click the currently displayed month and year at the top of the calendar.




4. To select a specific year, click the year at the top of the calendar.




5. To change the corresponding time, simply click the Clock icon in the Time field then select the time from the dropdown field. Please note that the times are displayed in 15 minute intervals.

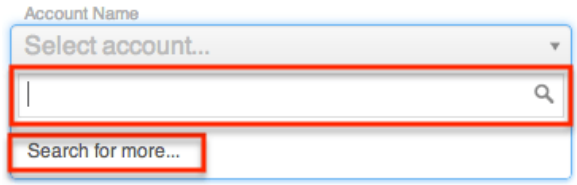



Editing Relate Fields

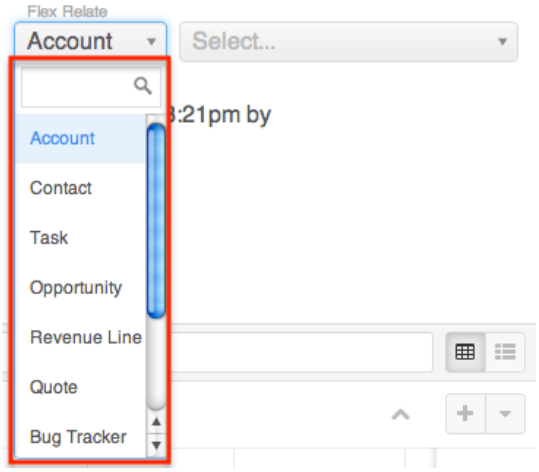
Users have the option to create relationships between various modules in Sugar using different relate type fields.

The following are some relate type fields in Sugar:

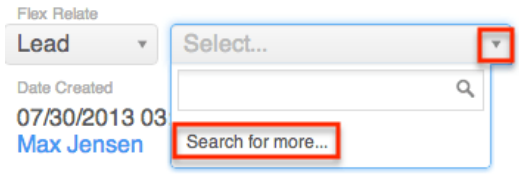
- Relate : Allows users to search and select related module records for a specific module. Please note that most one-to-many relationships in Sugar are represented by a relate field. Users can either search for the record by clicking the Search for more link on the bottom left or entering the record's name into the open text field and Sugar will pull up a list of records matching the name in the system.



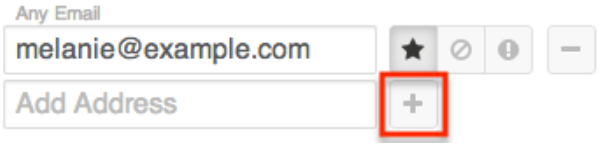

- Flex Relate : Allows users to select a module from the list of available modules with an existing relationship to the current module and choose a related module record. Please note that only one flex relate field may be added to a single module.



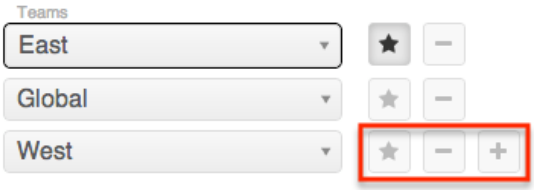
Once a module is selected, users can select the record from that module by clicking the triangle in the secondary field. You can then search and select the record to relate to the current module record.




- Email Addresses : Email address fields can be linked to many different email addresses for a single record. Click the Plus button to add additional email addresses to the record.
  Note: Please note that you can mark email addresses as Opted Out (Circle with slash button) or Invalid (Circle with exclamation point button) and only one email address can be set as the Primary (Star button). To delete the email address, click the Minus button.

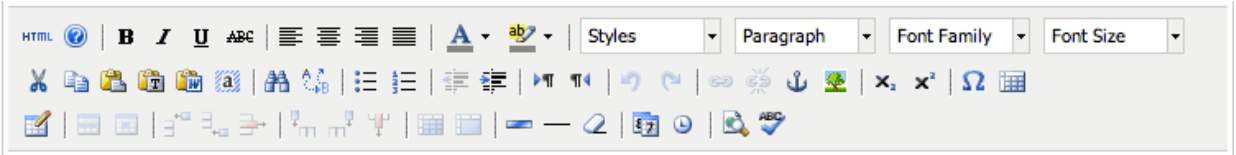



- Teams : The Teams field specifies the teams that have access to view the record. Click the Plus button to add additional teams to the record.
  Note: Please note that you can remove teams by clicking the Minus button and only one team can be set as the Primary team (Star button). For more information on teams, please refer to the Team Management documentation in the Administration guide.




## TinyMCE

TinyMCE is a third-party WYSIWYG tool that allows users to provide HTML formatting in specific sections in Sugar without requiring any HTML knowledge. TinyMCE is available when sending email, creating email templates, creating knowledge base articles, as well as other places within Sugar.

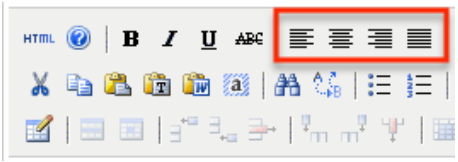



The following are some descriptions of the more commonly used features in TinyMCE:

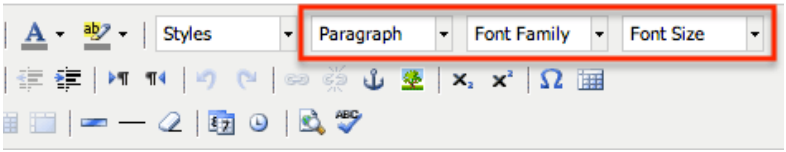
- Text Formatting : Use the folllowing buttons to format text to be bold, italics, underlined, or stricken through.



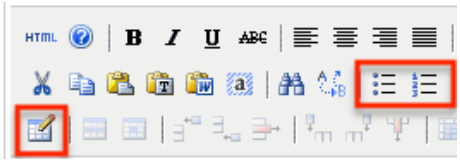
- Alignment : Use the following buttons to change the alignment of the text to be left, center, right, or justified.



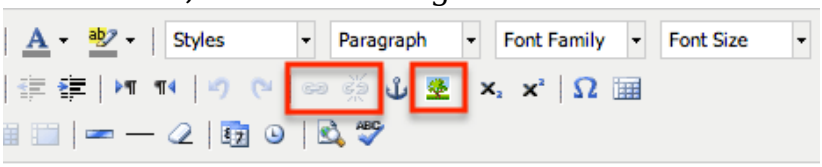
- Fonts : Use the following dropdowns to select special section formatting, fonts, and sizes.




- Layout Formatting : Use the following buttons to utilize bullet list, ordered lists, and tables.

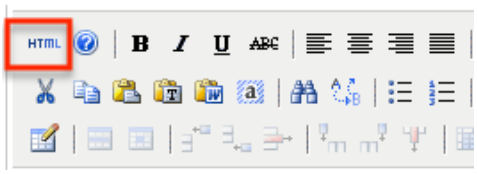


- Links and Images : Use the following buttons to create a link, remove a current link, or add an image.




- Advanced HTML : Click the HTML button to view your content in full HTML code. You may add and change the HTML to furthur refine your content.

  Not all HTML is allowed to be saved in Sugar. The following are some examples of HTML that will be removed when saved:
  - Anything outside of the <body></body> tags.
  - Any <style></style> tags.
  - Any <script></script> tags.
  - Any <form></form> tags.
  - Any <input> tags.Note: Inline CSS can be added to some elements (e.g. <p>, <pre>, and ), but due to different email client's rendering HTML email in unexpected ways, inline CSS is not allowed on some elements (e.g. , <img>, and <table>).




Last Modified: 01/23/2017 04:13pm

# User Interface (Legacy Modules)

## Overview

The user interface in Sugar is essentially everything you see and can interact within Sugar. Knowing what buttons allow you to do what actions and how to quickly add and edit information is critical to managing your customer information. This documentation is divided into related sections in order to cover in detail, interface options to perform specific tasks.

## Legacy Modules

This documentation will cover the Legacy user interface which is carried over from Sugar 6. Below is a list of modules which use the Legacy user interface. Other modules use the updated Sidecar user interface which is described in detail in the

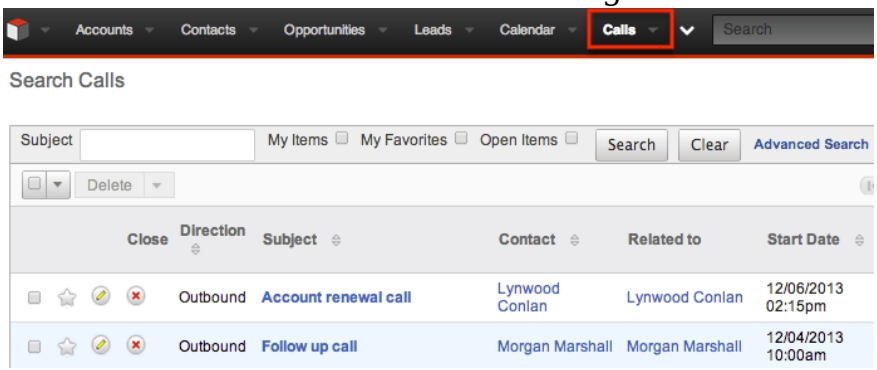
- Calendar
- Campaigns
- Contracts
- Documents
- Emails
- Knowledge Base
- Quotes
- Reports

Note: Custom modules that are created in Module Builder will utilize the Sidecar user interface. Custom modules installed to an instance prior to Sugar 7 that were not created in Module Builder will use the Legacy user interface upon upgrade to 7.x.

## List View

Each module in Sugar contains a list view to search and display records in a table format. To access a module's list view, simply click the module tab (e.g. Calls) in the navigation bar at the top of Sugar.
The list view displays all records meeting the current search criteria and to which your user has access. By default, Sugar sorts records in descending order of their creation date. You can view the basic details of each record within the field columns or select the record name to view it in the detail view.

Please note that you will only be able to see records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.




You have the option to change what fields are displayed in each module's list view by configuring your layout options in the Advanced Search. For more information on configuring your list view, please refer to the Layout Options section of the Search documentation. Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Basic Search

The basic search is at the top of the list view for each module and offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.
The following buttons and checkboxes are common across many Legacy modules' Basic Search panel and have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Items : Select this box to return only records assigned to you.

- My Favorites : Select this box to return only records you have marked as favorites.
- Open Items : Select this box to return only records with an open status (e.g. Planned).

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Items" and enter a name or subject, Sugar will only return records with a matching name or subject that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all records to which you have access within the module, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Administrators can configure what fields appear on the Basic Search for each module via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide. 

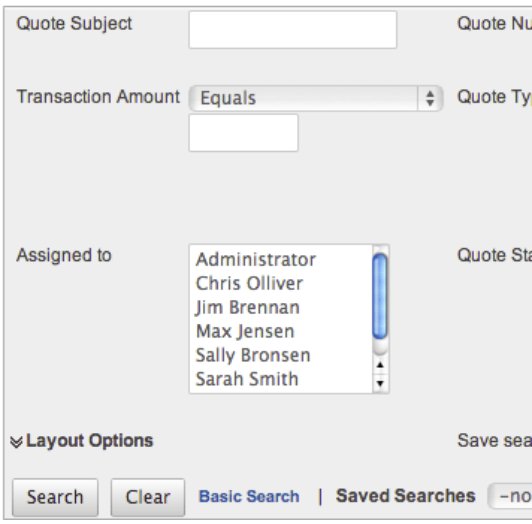

## Advanced Search

Advanced Search offers a more in-depth search experience than Basic Search including additional fields, layout options, and saved search capability. From the Advanced Search panel, you can click "Basic Search" for simplified searching.

The following buttons, checkboxes, and dropdowns are common across many Legacy modules' Advanced Search and have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Favorites : Select this box to return only records you have marked as favorites.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the Layout Options section of the Search documentation.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section of the Search documentation.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select "My Favorites" and enter in a field to search, Sugar will only return records matching that field that you have marked as favorites. When searching by a multiselect or dropdown field (i.e. "Assigned to"), however, Sugar will return records matching any of these selections. Once the search completes, the relevant results will populate in the list view below the search panel. To see all records to which you have access within the module, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.
Administrators can configure what fields appear on the Advanced Search for each module via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

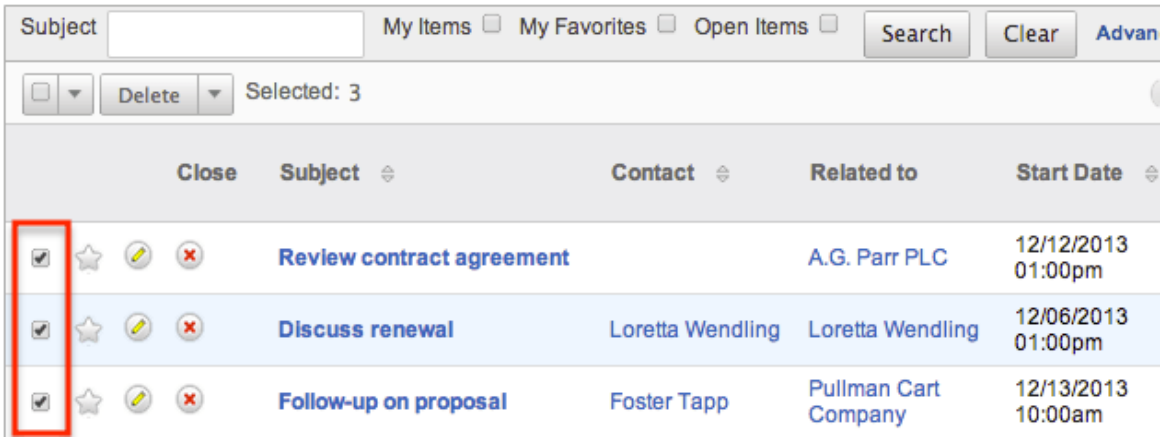



## Selecting Records

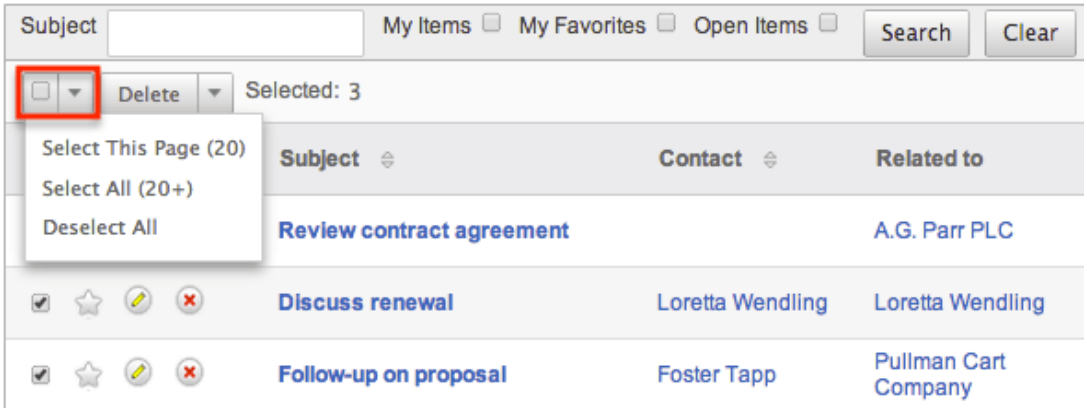
The list view in Sugar allows you to select a single record to view by clicking on the name or subject of the record to open it in the detail view. You can also select multiple records at once and perform certain actions on those records.

To select or deselect records in the Legacy modules list view, use the following methods:

- Individual Selection : Mark the checkbox on the left of each record's row on the list view you wish to select.




- Checkbox Selection : To select or deselect multiple records on the list view, use the options in this checkbox dropdown menu.
  - Select This Page : Selects all records shown on the current page of list view results. You can also click the open checkbox to the left of the Checkbox Selection menu to select all records on the current page.
  - Select All : Selects all records in the current search results across all pages of list view results.
    - Note: When using "Select All" you can not un-select single records, but will have to use the Deselect All option.
  - Deselect All : Deselects all records that are currently selected.

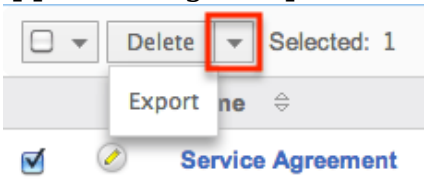



When selecting records, you can page through all of the records and Sugar will remember which records are selected. Depending on your Sugar settings you may see the count of records being selected or you may see a plus sign (+) to refer to more records. Simply select the Deselect All option to remove all selected records regardless of how they were initially selected.

## Mass Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records. It allows you to perform actions such as Delete, Mass Update, and Export for one or more records. Please note that not all Legacy modules have these actions available. The sections below will cover

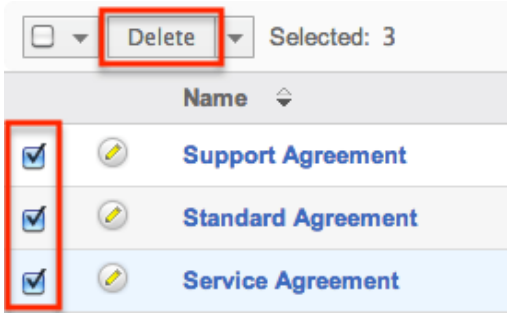
the most common actions across the modules. For more information on actions available within a specific module, please refer to the list view section in the application guide pertaining to the specific module.




Delete

The list view in Sugar allows you to easily mass delete records. Please note that deleted records are not permanently removed from the database, but are marked as deleted in the system so that it no longer appears in Sugar. These records can be recovered by anyone with direct database access. Also, deleting records in Sugar will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.
The following steps cover deleting call records via the Calls list view as an example:

1. Navigate to the Calls list view by clicking the Calls module tab.
2. Use the Basic or Advanced Search to find the Call records you wish to delete.
3. Select the desired call records individually or using the checkbox dropdown's
4. Choose "Delete" from the Actions menu.




5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

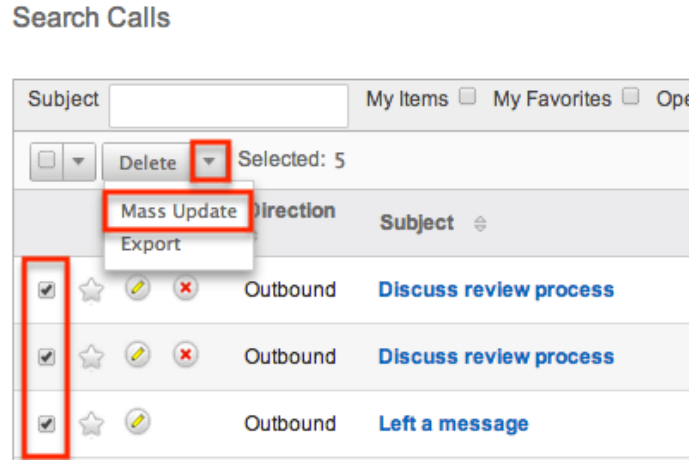
Due to PHP memory limitations on the server, there may be occasions when the application times out while deleting a large number of records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Mass Update

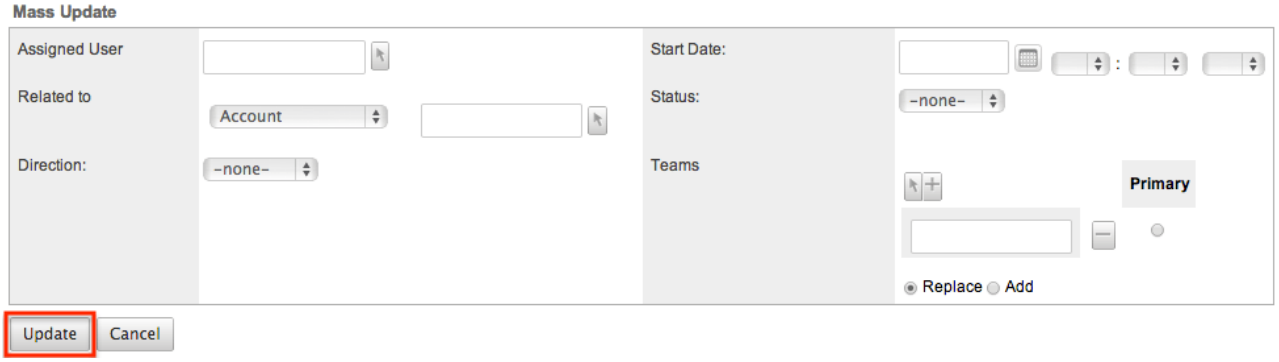
Mass Updating allows users to make the same change to multiple records at one time from the list view. Users with administrator or developer level access can

control which fields are available during mass updates via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide. Due to the PHP memory limitations on the server, there may be occasions when the application times out while mass updating a large number of records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.
Please note that your ability to mass update may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.
Use the following steps to mass update records from the list view:

1. Navigate to the list view by clicking the module tab in the navigation bar.
2. Use the list view's Basic or Advanced Search to identify records you wish to modify.
3. Select the desired records individually or using the checkbox dropdown's options.
4. Choose "Mass Update" from the Actions menu.




5. Scroll to the Mass Update panel and set values for the fields you wish to alter. Note: For the Teams field, use "Replace" to remove existing team assignments before adding those specified here. Use "Add" to add the teams specified here to any existing team assignments.

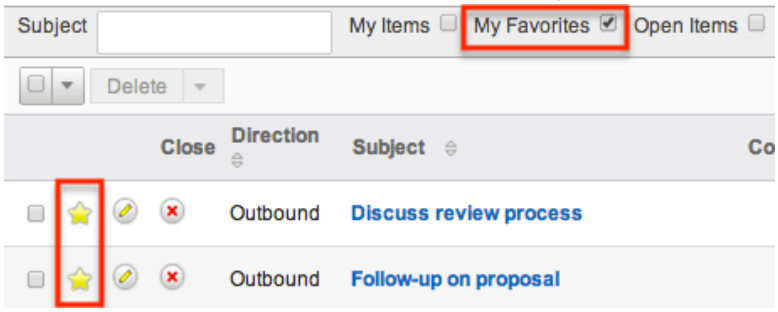


6. Click "Update" to save the changes to all of the currently selected records.

## Favorite Designation

Each Sugar user has the option to designate their own favorite records within modules which are important or will be viewed often so that they can easily be accessed via search or from the module tab. Once records are marked as favorites, use the My Favorites checkbox in the Basic or Advanced Search to retrieve your favorites or select from your most recent favorites directly from the module tab. Use the following steps to mark records as favorites via the list view:

1. Navigate to the list view by clicking the module tab in the navigation bar.
2. Use the Basic or Advanced Search to find the records you wish to mark as favorites.
3. Mark the star icon on the left of each desired record's row.
4. To remove the record as a favorite, click the star again to revert it to white.

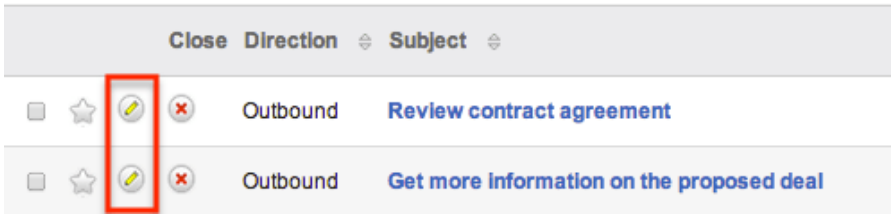



## Edit Option

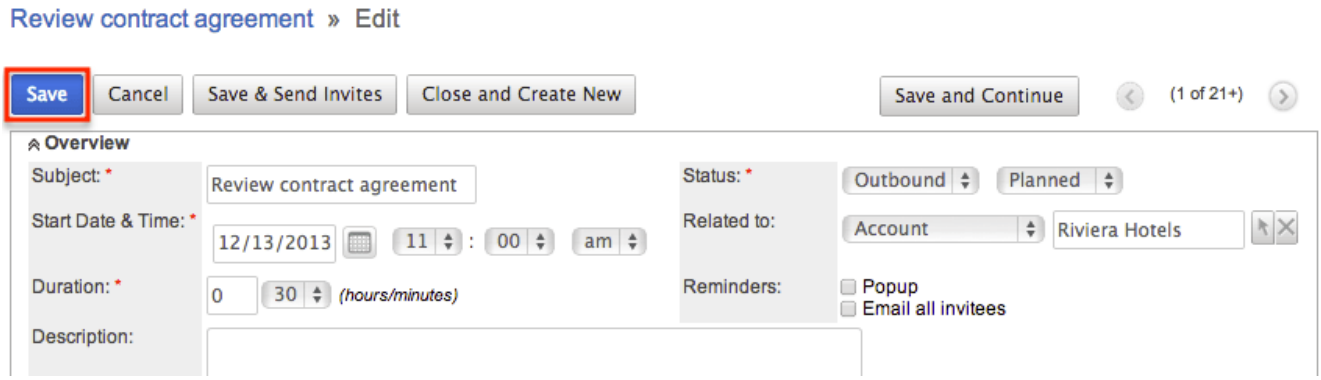
Records may be edited at any time to update or add information to the record. You can make changes to existing records by clicking the Pencil icon to the left of each record's name or subject in the list view. This will open up the records edit view layout to update the necessary fields and you can click "Save" to preserve the changes made.

Use the following steps to quick edit records via the list view:

1. Navigate to the list view by clicking the module tab (e.g. Calls) in the navigation bar.
2. Use the Basic or Advanced Search to find the records you wish to edit.
3. Click the Pencil icon to the left of the record's name or subject in the list view.



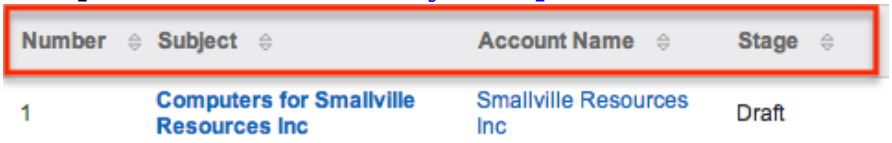

4. Update the necessary fields on the record's edit view layout, then click "Save" to preserve the changes.




Please note that your ability to edit records in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.
Administrators in Sugar may configure both the edit view and quick create via Admin > Studio. For more information on configuring layouts, please refer to the documentation in the Administration guide.

## Column Sorting

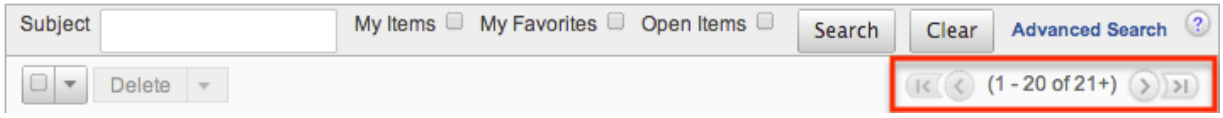
List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, simply click the column header noting that the fields which allow sorting will have a pair of arrows. You can click the column header again to reverse the sort order. Please note that the list view may be sorted by only one column at a time. You can also set a default order-by column using the layout options in Advanced Search. For more information on setting a default column sort, please refer to the Layout Options section of the Search documentation.




## Pagination

List view displays the current search results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. To the right just below the search panel you can see which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of your current results.

By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.




## More Information

Additional details for each record can be viewed by clicking the "i" icon to the far right of each list view row. This provides users a quick view of additional information in addition to what appears in the display column fields. The resulting pop-up window will show information such as Billing Address, Duration, Description, etc. fields by default. The list of fields appearing here may only be configured through a code-level customization.

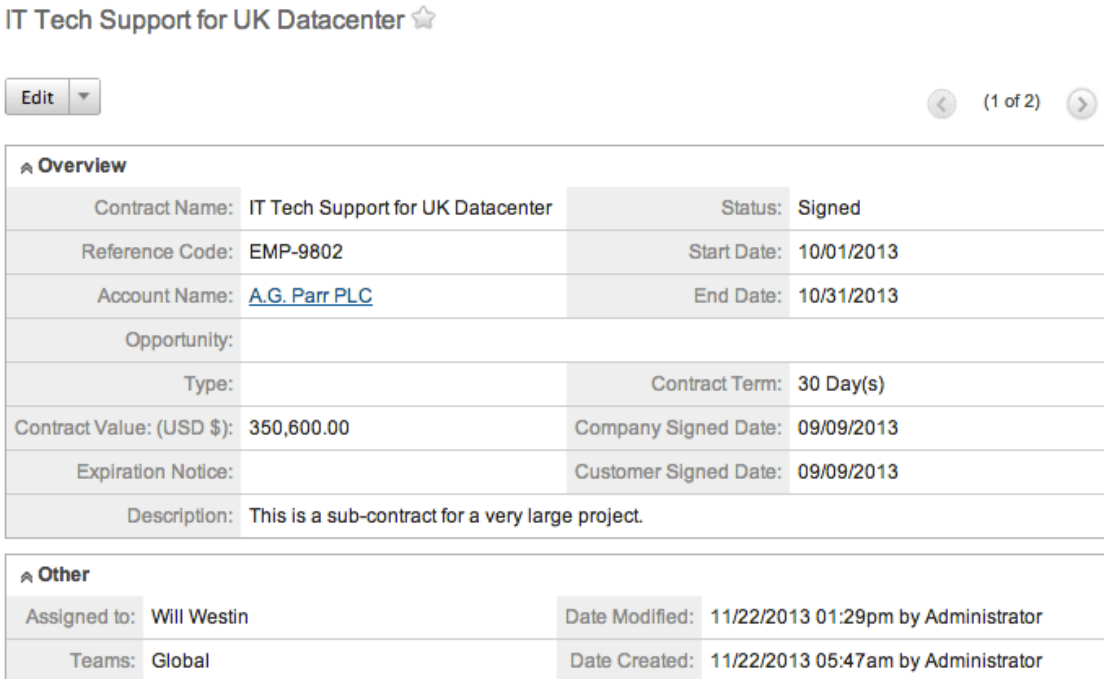



# Detail View

The modules detail view displays thorough information including all fields which are grouped by default into the Overview and Other panels. You can also view a record's related records (Activities, Documents, Contacts, etc.) which appear in subpanels beneath the records fields.

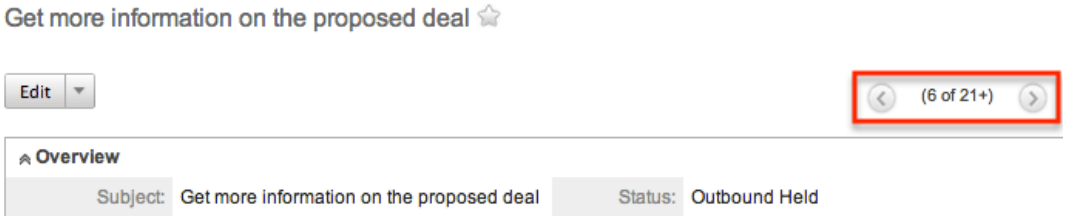
Please note that you will only be able to view a record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation

in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.To access a record's detail view, simply click on the name or subject link from anywhere in the application including from the module's list view.




## Next or Previous Record

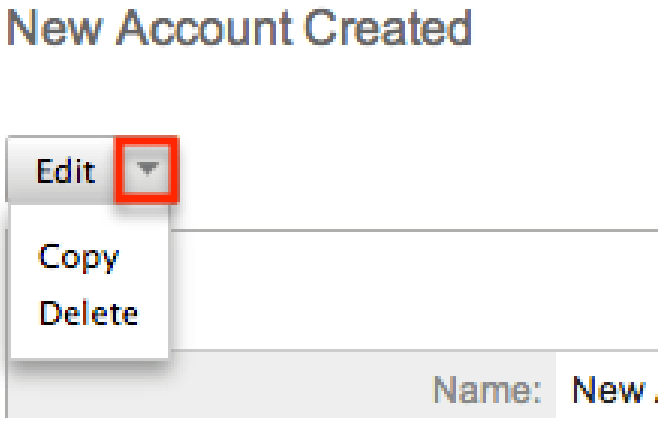
On the upper right of the detail view, there are two buttons that allow you to page through each record in the module list view's current search results. Clicking the Previous button displays the previous record of the current search results while clicking the Next button displays the next record of the current search results. The text in between shows which record result you are currently viewing within the total number of current results.



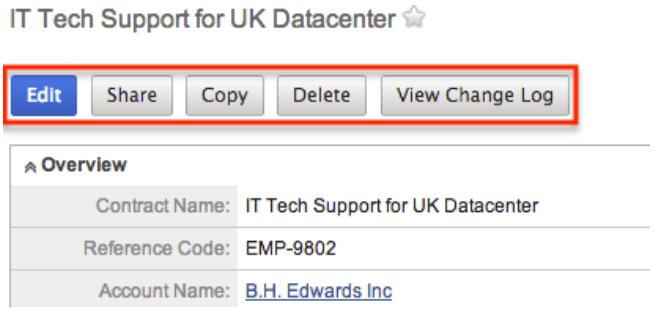

## Actions Menu

The Actions menu on the top left of each detail view allows you to perform various actions (e.g. Edit, Share, Copy, Delete, etc.) on the current record. Please note that the action items available in the Actions menu will vary between each Legacy

module.

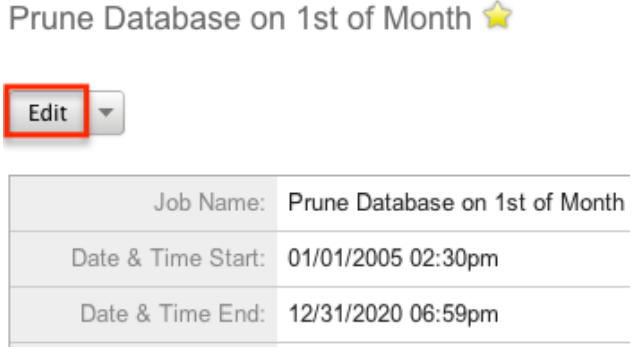



Administrator users can also change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the System documentation in the Administration guide. The following sections will cover the most common action items available across the Legacy modules. For more information on action items not listed here, please refer to the Detail View > Actions Menu section of the specific module's documentation.




Edit

You can edit records via the detail view by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve the changes made. For more inform ation regarding the edit view and how to edit records in Sugar, please refer to the Edit View section of this documentation.

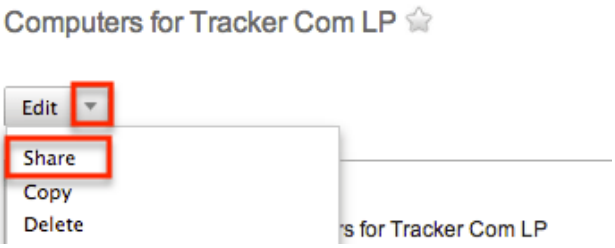


Please note that your ability to edit records in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure the module's editview via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

## Share

Individual records can be shared with other users in your organization by sending an email with the record's link directly from the record view. In the module's detail view (e.g. Quotes), select "Share" from the Actions menu which will open a Compose Email window including the URL of the record. Enter the recipient(s) email address in the To field then click "Send".

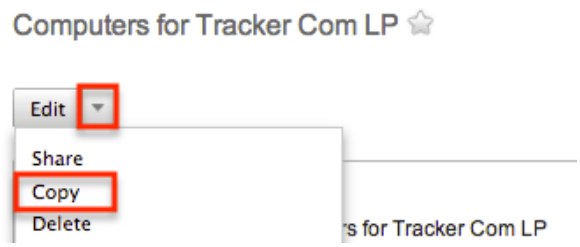



Users can simply click the link in the email to access the record in Sugar. Please note that the user must be logged into Sugar in order to access the record. Users will only be able to view the shared record as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

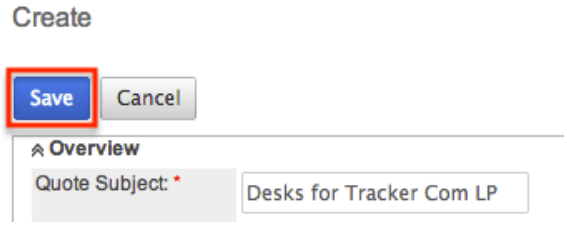
## Copy

You can create a new record by duplicating an existing record from the detail view. The Copy option is useful if the record you are creating has similar information to an existing record. Please note that any related record(s) to the original record will not be copied to the newly created record.
Use the following steps to create a record by duplicating an existing record:

1. Navigate to a record's detail view (e.g. Quotes).
2. Click the Actions menu and select "Copy".




3. The displayed edit view is pre-populated with the original records values. Update the necessary fields, then click "Save".




Delete

User's have the ability to delete record's that are invalid or should no longer appear in their organization's Sugar instance via the module's detail view. Deleting via the detail view allows you to delete a single record in the module. Please note that deleting records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

Please note that your ability to delete records in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

The following steps cover deleting a quote record from the Quotes detail view as an example:

1. Navigate to a quote's detail view.
2. Select "Delete" from the Actions menu.




3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

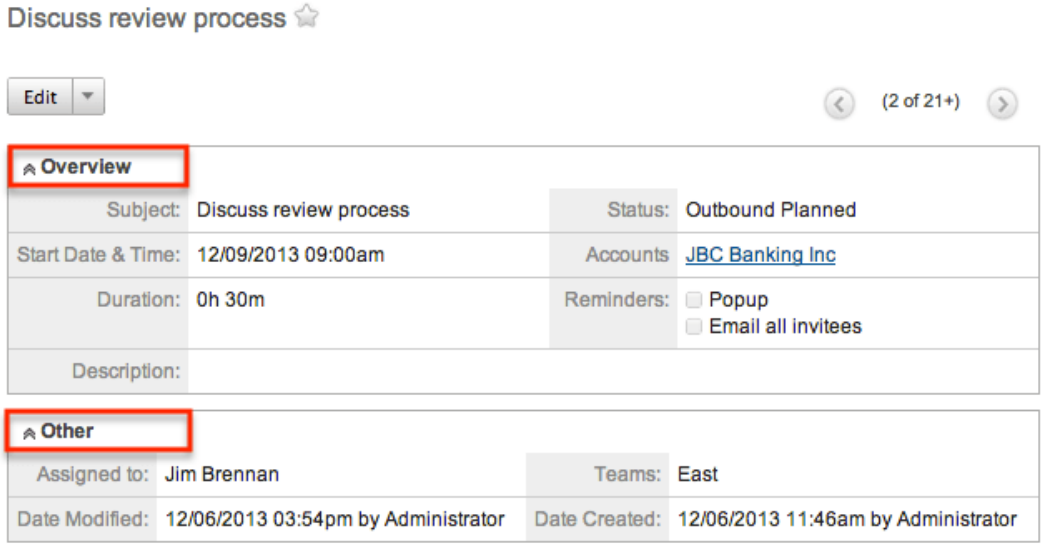
View Change Log

Changes made to each record are tracked over time, and for most modules users are able to view the history of changes via the change log in each record's detail view. To view the change log, navigate to a record's detail view and select "View Change Log" from the Actions menu. Please note that only fields marked as "Audit" in Admin > Studio will be displayed in the change log. For more information on designating a field for audit, please refer to the Studio documentation in the Administration guide.




## Field Panels

Field panels are what hold the fields for a record in the detail view. Most modules come with two panels defined by default: Overview and Other. Please note that the field panels can be collapsed to hide unnecessary data.




Users with administrator or developer access have the ability to change the fields (e.g. Name, Assigned User, etc.) and labels inside the field panels as well as move, create, and edit existing field panels via Admin > Studio to provide visibility to the most important fields. Field panels can also be collapsed by default via Admin > Studio. For more information on modifying field panels, please refer to the Studio

documentation in the Administration guide.

## Subpanels

Beneath the module record's fields are subpanels containing related records from various modules (e.g. Activities, Documents, Contacts, etc.). The subpanels that appear in a record's detail view is based on the relationships defined for the current module as well as the administrative settings on which subpanels are set to display in Sugar. You can expand and collapse subpanels as well as rearrange them per your viewing preference. For more information on changing the display of subpanels, please refer to the Layout section of this documentation. You can create related records as well as relate an existing record directly from the subpanel. Please note that the actions available in the Actions menu can vary between certain subpanels (e.g. Activities, History).

Users with administrator or developer access have the ability to change the fields (e.g. Status, Subject, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.

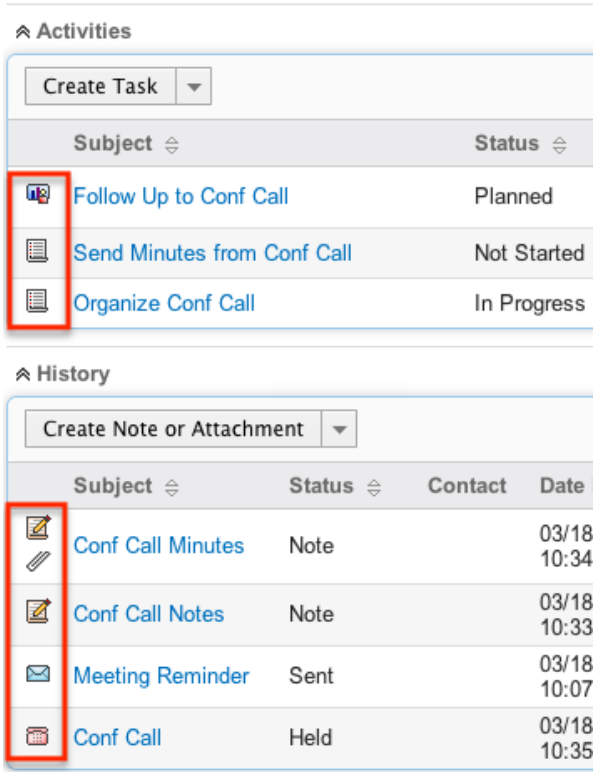
### Activities and History

The Activities and History subpanels are special subpanels in Sugar that show data from multiple modules based on certain criteria. For example, a meeting with a status of "Planned" will appear in the Activities subpanel. Once the meeting is changed to a status of "Held", it will move from the Activities subpanel to the History subpanel. All related note and email records will appear in the History subpanel as there are no filters on those modules, but notes and emails will never display in the Activities subpanel. If you customize the status field for any of the modules, the records that hold a custom status will appear in the Activities subpanel. But code level customizations would be required to have a new status show in the History subpanels.
Please refer to this chart for the criteria both subpanels use to query data:

| Subpanel | Module | Status Field Filter |
|---|---|---|
| Activities | Meetings | Does not Equal "Held" |
| | | Does not Equal "Not Held" |
| | Tasks | Does not Equal "Completed" |
| | | Does not Equal "Deferred" |
| | Calls | Does not Equal "Held" |

| | | |
|---|---|---|
| | | Does not Equal "Not Held" |
| History | Meetings | Equals "Held" |
| | | Equals "Not Held" |
| | Tasks | Equals "Completed" |
| | | Equals "Deferred" |
| | Calls | Equals "Held" |
| | | Equals "Not Held" |
| | Emails | N/A |
| | Notes | N/A |

Since the Activities and History subpanels contain records from many different modules, there are some differences in the actions and record display than in normal subpanels. Each record in both subpanels will have an icon to the far left indicating which module the record originates from. For example, if the record is a call then the Telephone icon will display to the left of the subject.

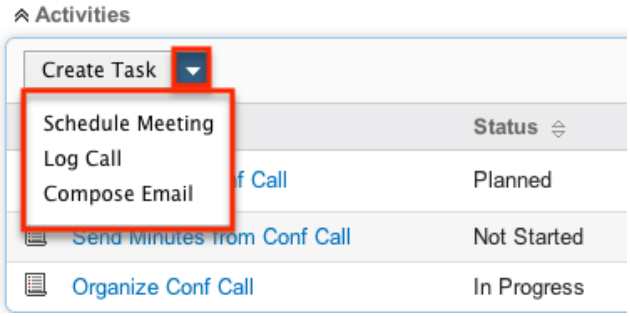



Normal subpanels typically have a Create and Select option to create or link related records. The Activities and History subpanels have multiple actions due to the fact that there are multiple modules involved.
You have the following actions available from the Activities subpanel:

- Create Task : Creates a new task record related to the record currently being viewed.

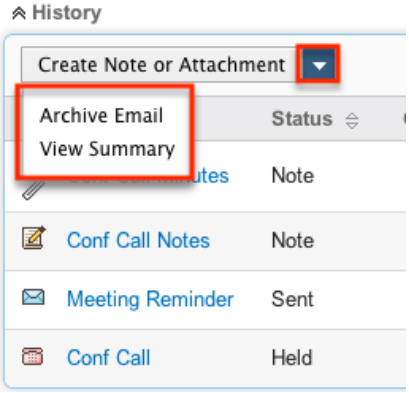
- Schedule Meeting : Creates a new meeting record related to the record currently being viewed.
- Log Call : Creates a new call record related to the record currently being viewed.
- Compose Email : Launches the Compose Email popup window to send an email.
    - Note: The email will automatically be related to the current record (e.g. Quotes) you are viewing.

Note: When creating a Task, Meeting, or Call from the Activities subpanel, you have the ability to set the Status field to "Held" or "Completed" which will place it in the History subpanel.




You have the following actions available from the History subpanel:

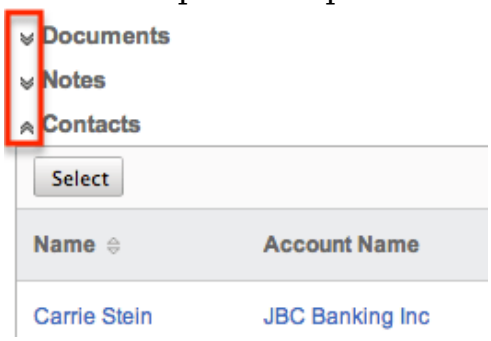
- Create Note or Attachment : Creates a new note record related to the record currently being viewed.
- Archive Email : Allows a received email to be entered manually on a record for historical purposes only.
    - Note: This will not send an email to you or the email address on the record.
- View Summary : Opens a popup window with the Subject, Status, and Detail of all associated records in the History subpanel. This is useful as it allows you to view a history of all activities that have taken place for the current record.



Layout

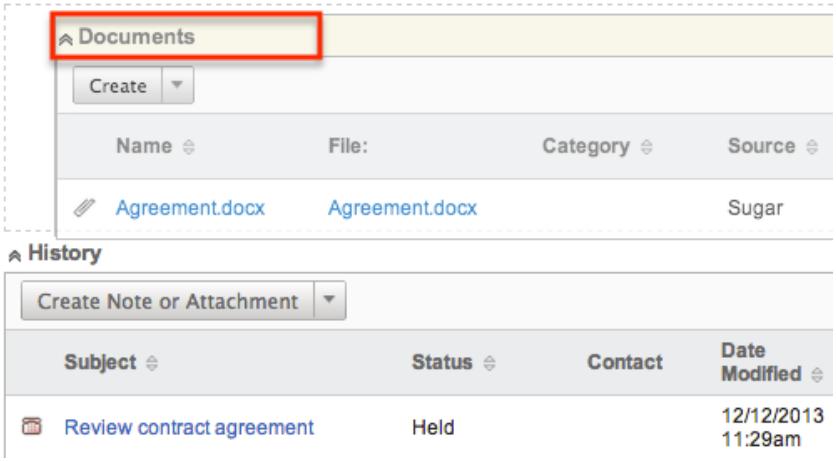
Subpanels in Sugar can be personalized by each user to only display the most relevant subpanels per their viewing preference.

- Collapse/Expand : Click the double arrow to the left of the subpanel's name to either collapse or expand the subpanel.




- Rearrange Subpanels : Drag and drop the subpanel's header bar to move the subpanel to a new location on the detail view.

  Note: Administrators can prevent users from moving subpanels to different locations on the detail view. For more information on preventing rearranging of subpanels, please refer to the System documentation in the Administration guide. Check with your system administrator if you are not able to rearrange your subpanels.

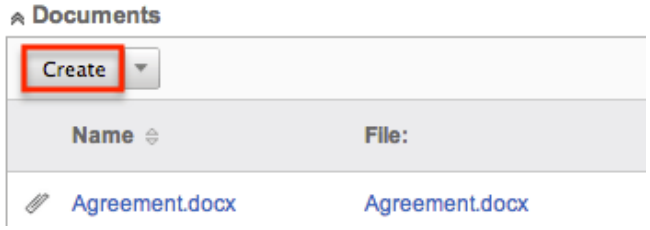



Actions

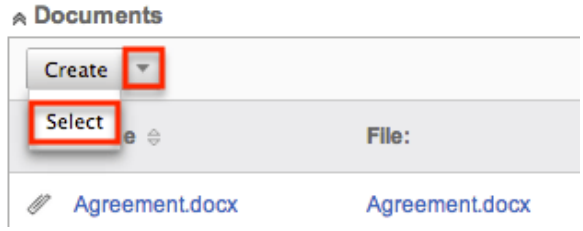
Related record subpanels (e.g. Contacts) also provide options to create or select related records directly from the detail view.

- Create : Choose "Create" from the subpanel's Actions menu to relate a new

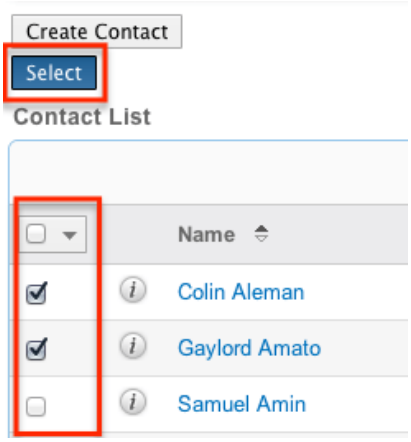
record. The newly created record will automatically be related to the current record you are viewing.



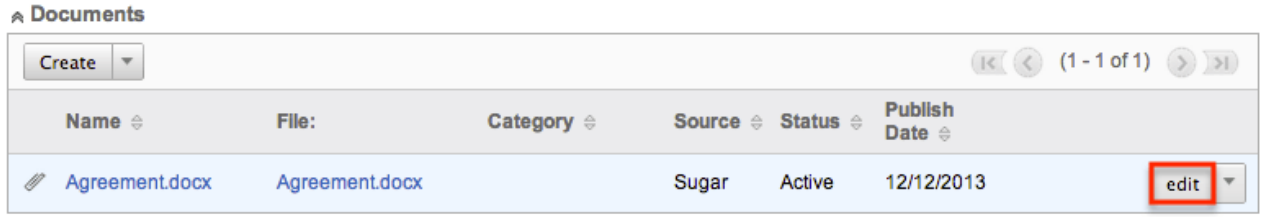

- Select : Choose "Select" from the subpanel's Actions menu to relate an existing record. The Search popup window will display allowing you to select record's to relate to the current record you are viewing.



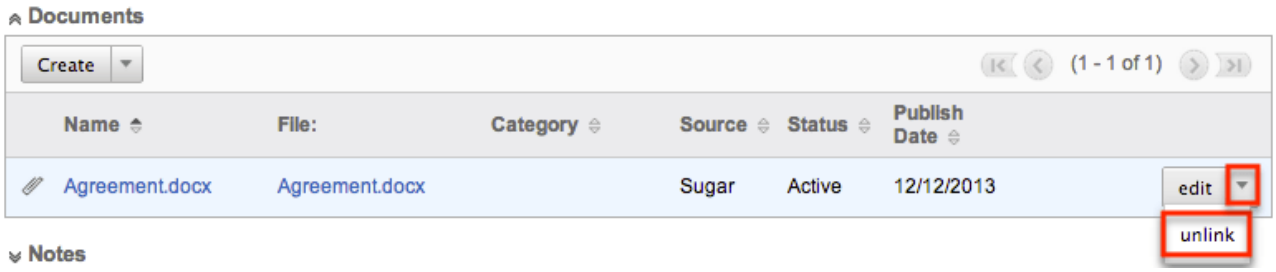

You may also select multiple records in the search popup to be related to the main record.




- Edit : Choose "Edit" on the far right of the record's row to edit the related record in the subpanel. Make the necessary changes to the record then click "Save" to preserve the changes.



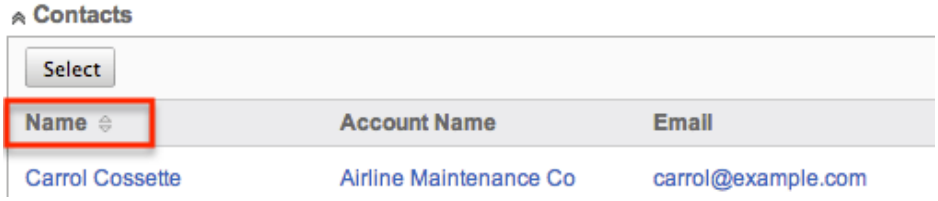

- Unlink : Choose "Unlink" from the dropdown on the far right of the record's row to remove the relationship between the related record and current record.
    - Note: This removes the relationship, but does not delete the record itself.




Users with administrator or developer access have the ability to change the fields (e.g. Name, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.

## Column Sorting

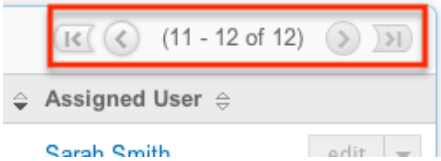
You can sort all of the related records in each subpanel by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. Please note that each subpanel may be sorted by only one column at a time.




## Pagination

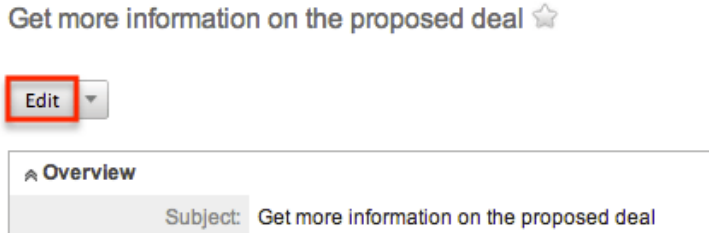
The top right of the subpanel shows which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of the set.

By default, Sugar displays 5 records per subpanel results set, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.



# Edit View

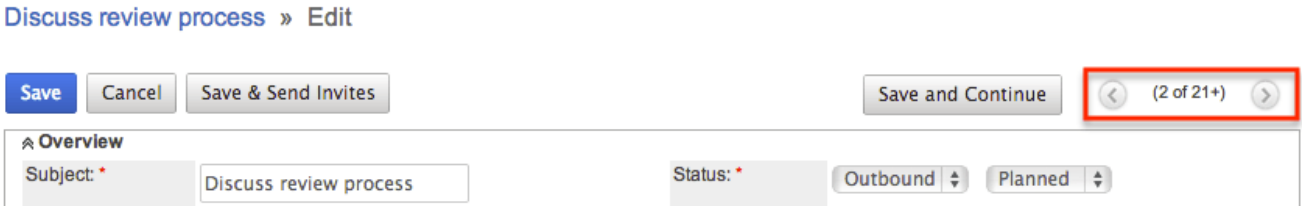
The module's edit view allows record's to be edited at any time to update or add information as necessary. The Edit View layout is available for most Legacy modules (e.g. Quotes, etc.) and can be accessed by clicking the Edit button on the upper left of the detail view.




Please note that your ability to edit records in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.
Administrators in Sugar may configure the edit view via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

## Pagination

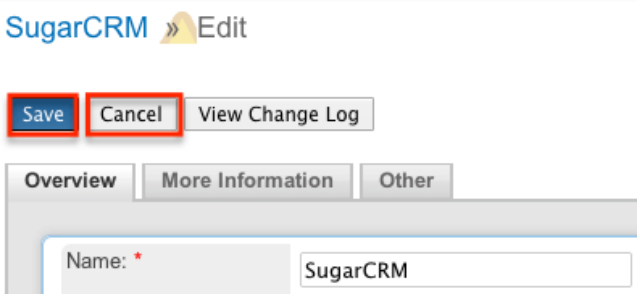
On the upper right of the Edit View layout, there are two single-arrow Next and Previous buttons which allow you to page through each record in the list view's current search results. Clicking the Left arrow button displays the previous record of the current search results while clicking the Right arrow button displays the next record of the current search results allowing you to edit records as necessary. The text in between the arrows, shows which record result you are currently editing within the total number of current results. Once the necessary changes have been made, you can click "Save and Continue" if you wish to save the details in the current record and proceed with editing the next record.




## Editing Records

Records may be edited at any time to update or add information to the record. Once in the edit view, update the necessary fields available on the layout then click "Save" to preserve the changes. You can click "Cancel" at any time to return to the

previous page without editing the record.

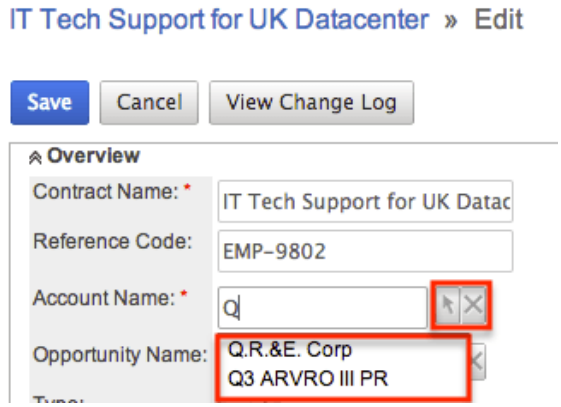



Administrators in Sugar can configure the Edit View layout via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

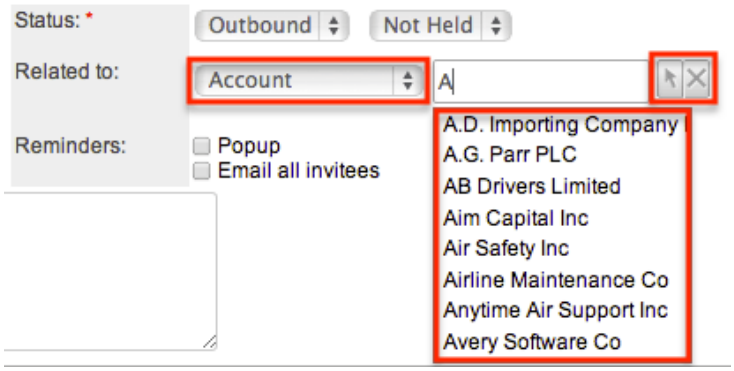
## Editing Related Fields

Sugar contains many different relationships between different modules and a couple of different relate fields for users to create relationships with.

- Relate : Most one-to-many relationships in Sugar are represented by a relate field. Relate fields on the edit view layout display an Arrow and "X" button to the right of the field. You can either click the Arrow button to select a related record from the record selection window or begin typing in the open text box to pull up a list of records matching the keyword.




- Flex Relate : Allows a dynamic module and a record from that module to be related to the current record. Users can first select the module from the dropdown list then choose or enter the record they wish to relate to the current record they are viewing.




- Email Addresses : Email address fields can be linked to many different email addresses for a single record. Click the Plus button to add an email address to a record.




Each email address can be set as Opted Out or Invalid. Only one email address can be selected as the Primary. Click the minus sign to remove an email address from a record.



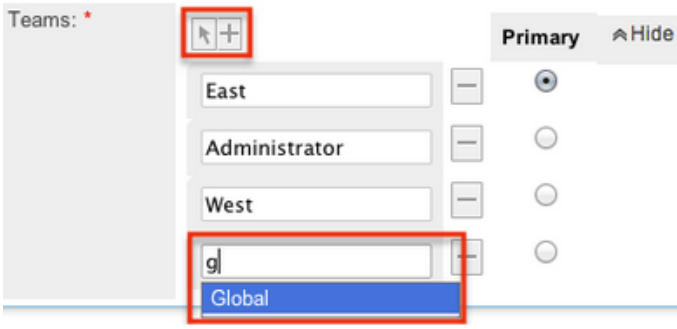

- Teams : The team field specifies which team or teams of users have visibility of each record. If there are multiple teams on a record, click "Show" to view all of the teams.




Click the Arrow icon to open the team selector window, or click the Plus icon to add a new row to use the type-ahead feature.

Click the Minus icon to remove a team from the record and select only one team to be the primary team.

For more information on teams, please refer to the Team Management documentation in the Administration guide.




Last Modified: 09/26/2015 05:23pm

# Activity Streams

## Overview

Sugar's activity stream allows users to view a list of activities performed on records, create posts, preview posts, comment on posts, etc. Users can easily track the most recent updates across their entire organization via the record and user posts on the activity stream. The activity stream can be accessed via the home page, module list view (e.g. Contacts list view), module's record view (e.g. Contacts record view), as well as the intelligence pane.

The modules currently enabled to generate record posts for the activity stream are Accounts, Bugs, Calls, Cases, Contacts, Leads, Meetings, Notes, Opportunity, Quoted Line Items, Revenue Line Items, and Tasks. This documentation will go over the basics of the activity stream as well as the various options available when viewing posts, creating posts, commenting on posts, etc.

## Viewing Activity Streams

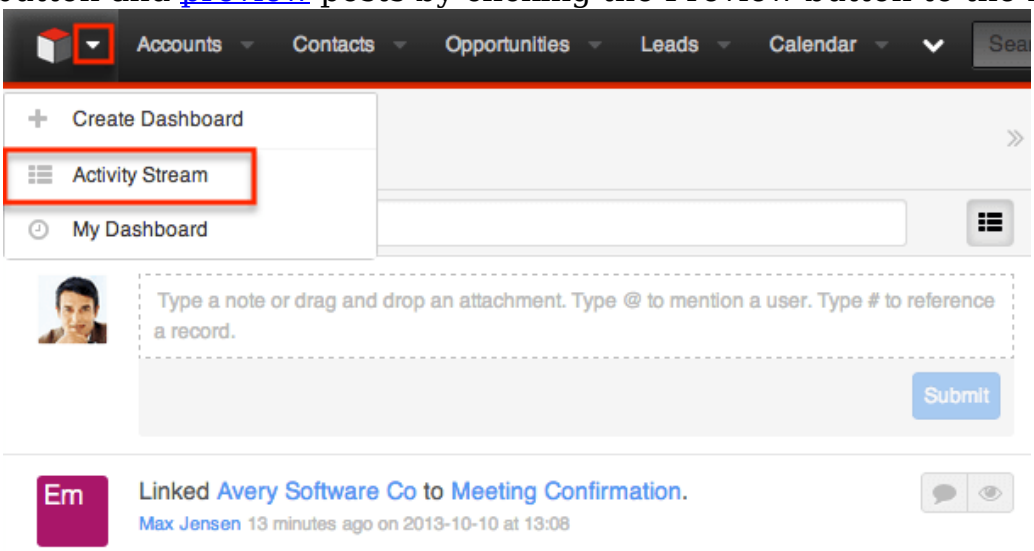
There are various options available for viewing activity streams in Sugar including via the home page, list view, record view, and intelligence pane. User's will be able to view record posts (e.g. create, update, link, unlink), user posts, comments, and attachments via the activity stream. Keep in mind that if you are not the assigned user or did not create the record, you must follow the record in order to view all related posts via the Home page and List view activity stream.

Please note that you will only be able to view and access the activity stream for audit-enabled modules (Accounts, Bugs, Calls, Cases, Contacts, Leads, Meetings, Notes, Opportunity, Quoted Line Items, Revenue Line Items, and Tasks) in Sugar. Un-audited modules (e.g. Target, Target List) will not display the list view activity stream, record view activity stream, or provide the option to follow a record.

Note: Activity streams are not available for custom modules.

## Viewing Via Home Page

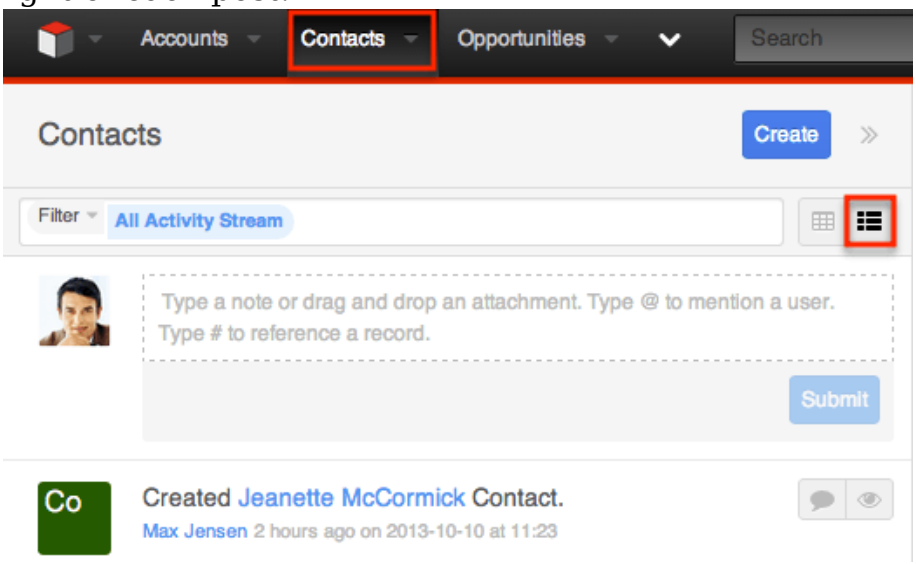
The Home page activity stream allows users to view all posts for records they are following in Sugar as well as all user posts created on the Home page activity stream. For more information on following records, please refer to the Following Records section of this documentation. You can access the Home page activity stream by clicking the triangle next to the Sugar cube icon on the upper left of Sugar then selecting "Activity Stream". All posts created via the Home page activity stream will be viewable by user's in your organization. For more information on creating posts, please refer to the Creating User Posts section of this documentation. You can also comment on posts by clicking the Comment button and preview posts by clicking the Preview button to the right of each post.




## Viewing Via List View

The list view's activity stream displays all posts for records being followed in the current module as well as all user posts created on the list view activity stream. For more information on following records, please refer to the Following Records section of this documentation. To access the list view activity stream, click the specific module tab (e.g. Contacts) at the top of the navigation bar then click the Activity Stream button to the right of the list view's search bar. You can view both user and record posts relevant to the module as well as create a post and comment

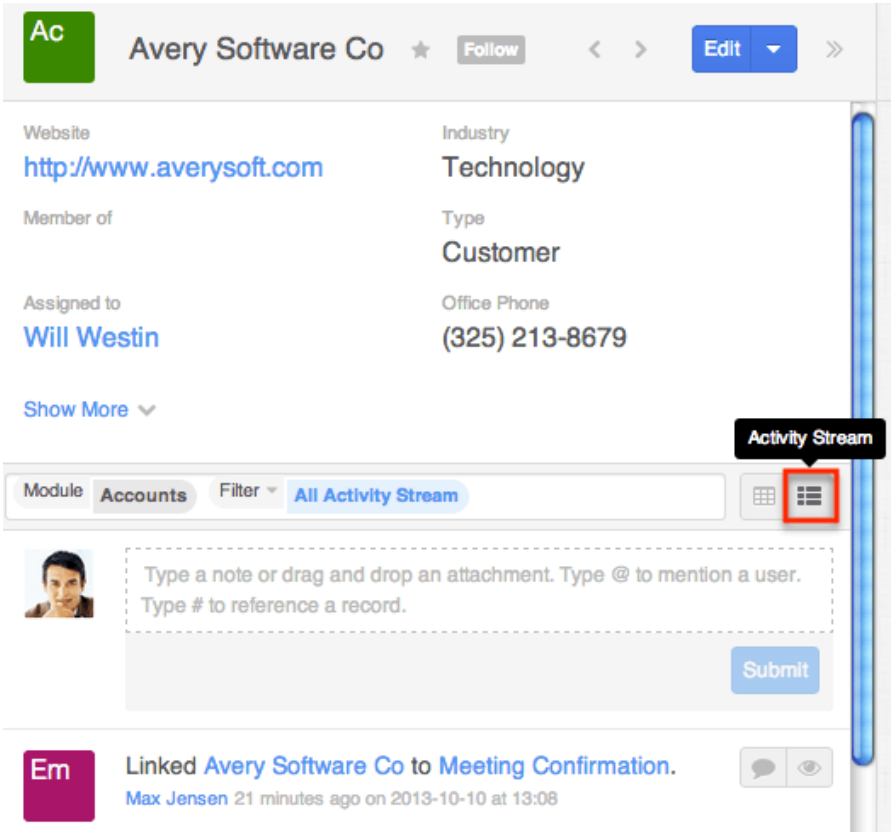
on posts. For more information on creating posts and commenting on posts, please refer to the Creating User Posts and Commenting on Posts section of this documentation. You can also preview the post by clicking the Preview button to the right of each post.




## Viewing Via Record View

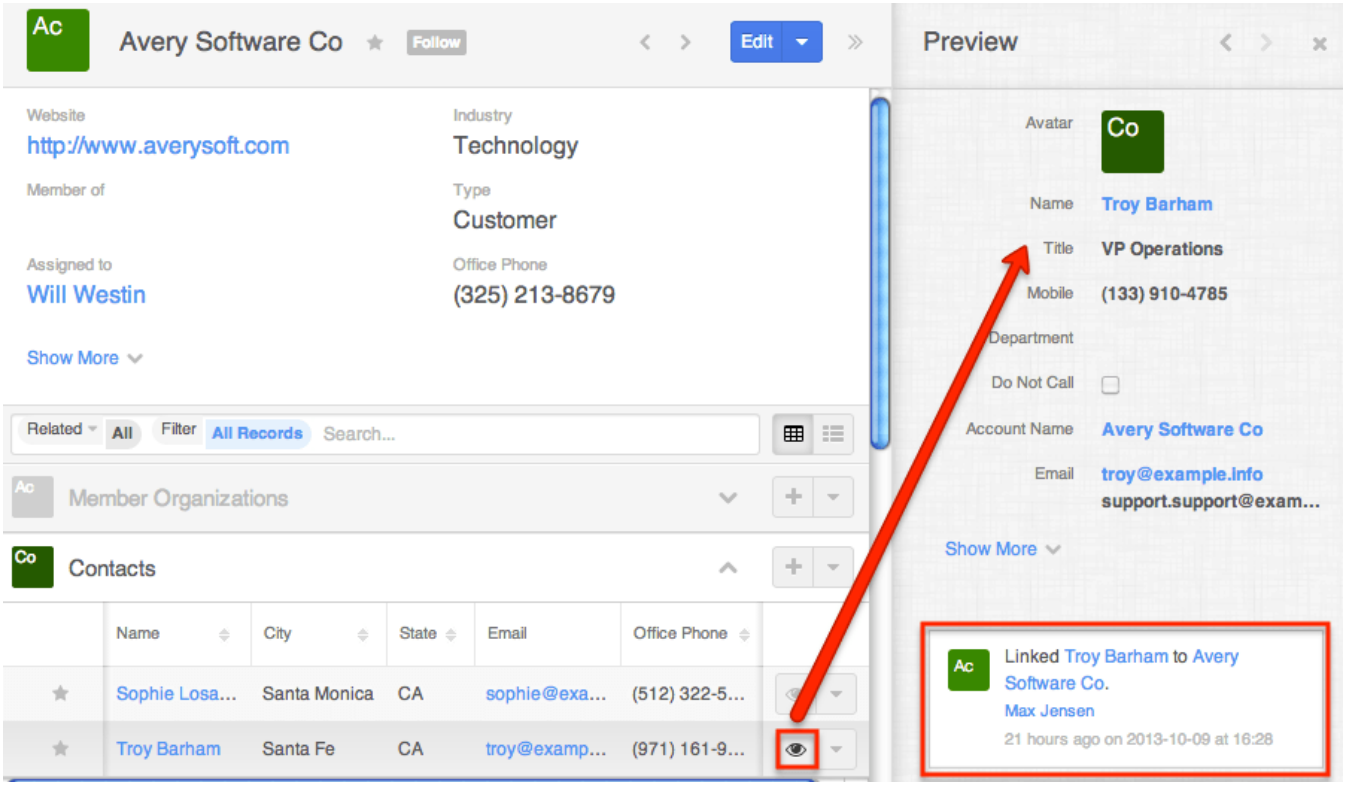
The record view's activity stream displays all posts specific to the current record you are viewing. Users can view all posts in the record view's activity stream even if they do not follow the record in Sugar. Please note that you must follow the record if you wish to view the record view posts via the Home page or List View activity stream. For more information on following records, please refer to the Following Records section of this documentation. To access the record view's activity stream, navigate to a module's record view (e.g. Avery Software Co) then click the Activity Stream button below the module's fields.

Please note that user posts created via the Home page or List View activity stream that reference the specific record's name will also appear in the record view's activity stream. For more information on referencing specific records, please refer to the Referencing Users and Records section of this documentation.




## Viewing Via Intelligence Pane

The intelligence pane in Sugar allows users to view a record's detail along with the related activity stream information directly from the Home page activity stream, module's list view, as well as the record view. To preview a record's details, simply click the Preview button to the right of a record post on the Home page or List View activity stream. You can also preview a record via the module's list view or related record subpanel by clicking the Preview button to the far right of each record's row. Any associated user and record posts will appear below the record's detail in the intelligence pane. Please note that unlike viewing via the Home page, List View, or Record View activity stream, you cannot create posts or comment on posts via the intelligence pane.




## Activity Stream Views

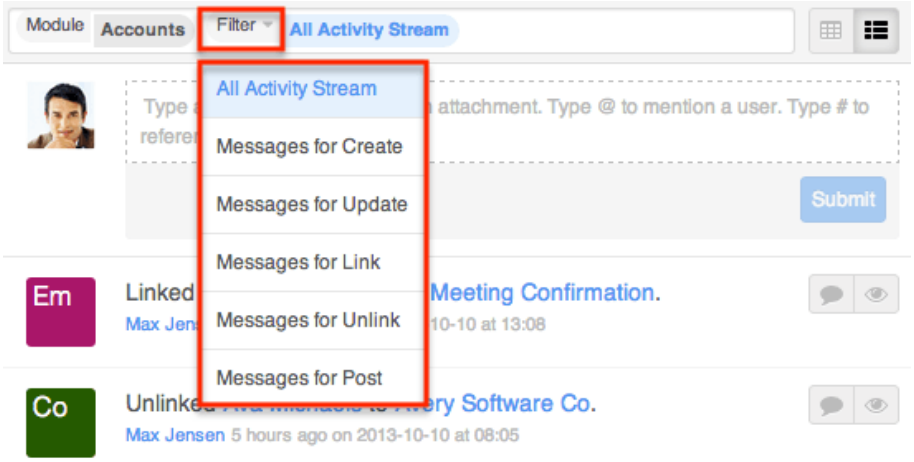
The activity stream allows users to view a list of activities performed on records, post messages, share external links, etc. The activity stream can be accessed via the Home page, module's list view (e.g. Contacts list view), as well as the module's record view (e.g. Contacts record view). For more information on viewing the activity stream in Sugar, please refer to the Viewing Activity Streams section of this documentation. The following will cover the various options available to users when creating posts, viewing posts, commenting on posts, etc. in the activity stream.

### Post Options

There are various post options (e.g. external links, images, etc.) available to users when creating user posts in the activity stream. You can add external links, messages, etc. to your user post by dragging and dropping the corresponding links into the post input box. Files saved on your local machine can also be attached to your user post to share with users in your organization. In addition, you can mention specific users as well as reference specific records by typing in the @ or # sign followed by the user or record name. For more information on the various post options available, please refer to the User Post Options section of this documentation.

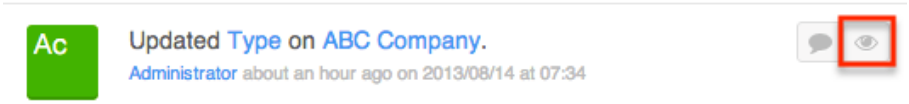
## Filter Options

The activity stream can also be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box then selecting the desired message type. This enables users to filter the activity stream to only display specific activity type's they wish to view. To view all posts in the activity stream, simply select the All Activity Stream option in the filter.




## Preview Button

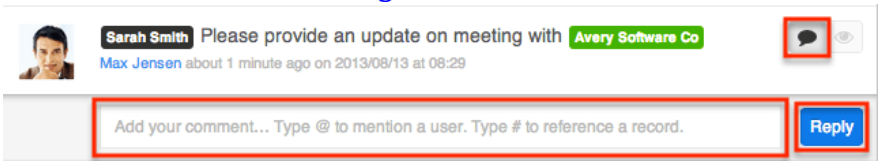
The Preview button to the right of each post allows users to preview the record referenced in record posts. The intelligence pane will display the record's details with key information regarding the record as well as any related activity stream information. Please note that preview is available for Create, Update, Link, and Unlink-type posts in the activity stream. User posts that originate from the record view's activity stream can also be previewed on the Home page and List View activity stream as it automatically references the record in the post. To close the preview, simply click the "X" on the upper right of the intelligence pane. For more information on previewing posts, please refer to the Previewing Posts section of this documentation.




## Comment Button

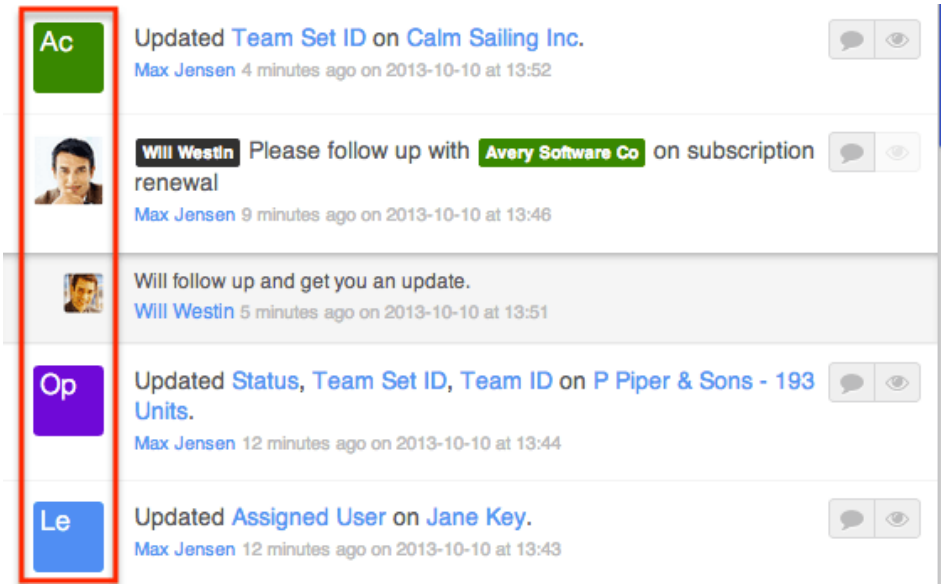
User's have the ability to respond to posts via the activity stream by clicking the Comment button to the right of each post. Once you click on the button, simply type your message into the comment box then click "Reply". Please note that comments are visible to all users in Sugar unless they do not follow the record in

Sugar. For more information on following and un-following records, please refer to the Following Records and Un-Following Records section of this documentation. When a comment is added, the post will move to the top of the activity stream once the activity stream page is refreshed. For more information on commenting, please refer to the Commenting on Posts section of this documentation.




## Post Icon

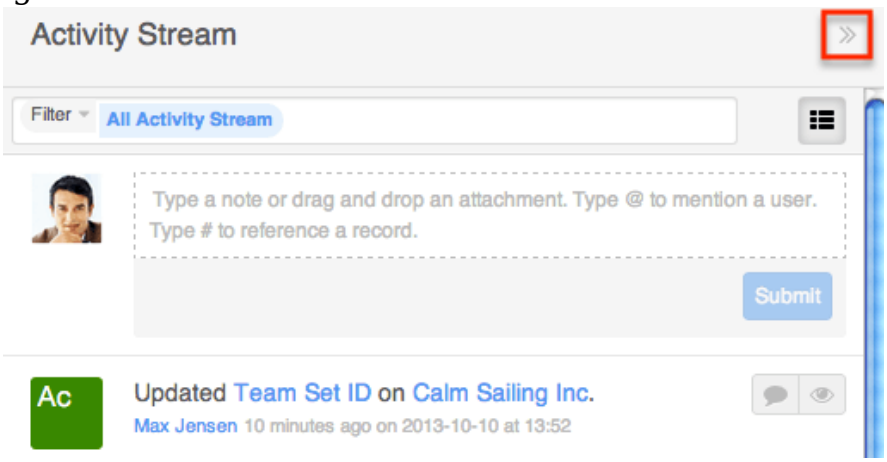
To the left of each post is the Post icon which allows users to easily identify the module that a record post is specific to, the user who created the post, etc. The Post icon's for record posts are color coded and display the first two letters of the module to differentiate the various record posts for modules. For example, an update post for the Accounts module will display a green box with the letters "Ac", while a post for the Opportunities module will display a purple box with the letters "Op". User posts as well as comments added to posts display the user's profile image as the Post icon, which helps to identify the user who created the post or added the comment. For more information on uploading a profile picture to your Sugar account, please refer to the User Profile sectionof the Getting Started documentation.




## Right Hand Side Drawer

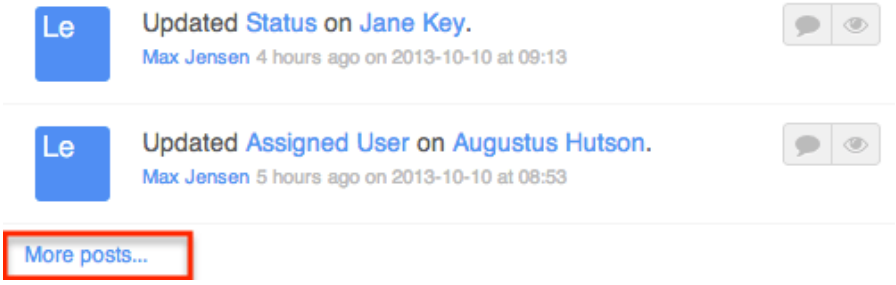
On the upper right of the Home page activity stream, module's list view, and record view there is a Double arrow icon which allows users to expand the activity stream to the full screen width. The intelligence pane to the right of the activity

stream will be hidden when the activity stream is expanded. To reduce the activity stream's width and reveal the intelligence pane, simply click the Double arrow icon again.




### More Posts

The activity stream loads an initial number of posts with the option to show additional posts at the user's request. By default, Sugar displays 20 posts per activity stream view, but administrators can change the number of posts displayed via Admin > System Settings. For more information on changing the number of displayed posts, please refer to the System documentation in the Administration guide. To load the next set of posts, simply click the More Posts link on the bottom left of the activity stream.




## Personalizing Activity Stream

User's can personalize their activity stream by specifying which records' posts should appear on their Home page and List View activity streams. You can follow specific records that you have access to view in Sugar by marking the Follow button in the record view or the Follow option in the list view. Please note that you automatically start following records that you mark as favorites in Sugar.

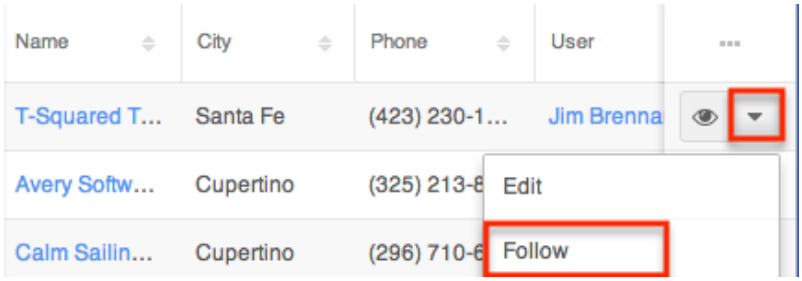
### Following Records

Users can choose to follow specific records to which they have access to in Sugar. You can mark a record to follow via the module's list view by selecting "Follow" in the record actions menu as well as the record view by clicking the Follow button (If grayed out) to the right of the record's name. All posts appear on the Home page and List View activity stream for records you follow in Sugar. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. Should a user lose access to a record in Sugar, they will automatically stop following that record.

## Following Via List View

The following steps cover marking a record to follow via the Accounts list view as an example:

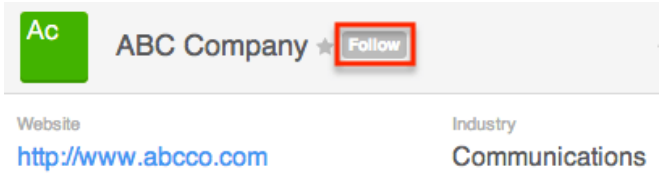
1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the Module Searchto find the Account records you wish to follow.
3. Click the Record Actions menu to the far right of the records row and select "Follow".




## Following Via Record View

The following steps cover marking a record to follow via the Accounts record view as an example:

1. Navigate to an Accounts record view.
2. Click the Follow button to the right of the accounts name.



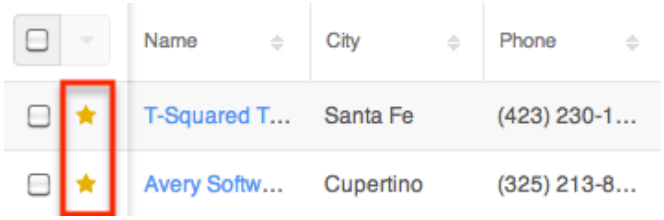
## Favoriting Records

Each Sugar user has the option to designate their own favorite records which are important or will be viewed often so that they can easily be accessed via search or from the module tab. You can mark a record as a favorite via the module's list view, record view, and related record subpanels. Please note that you will automatically start following records you designate as favorites in Sugar.

### Favoriting Via List View

The following steps cover marking records as favorites via the Accounts list view as an example:

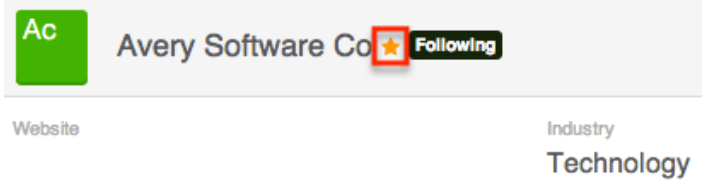
1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the Module Search to find the Account records you wish to mark as favorites.
3. Mark the star icon on the left of each desired account's row.
4. To remove the account as a favorite, click the star again to revert it to gray.




### Favoriting Via Record View

The following steps cover marking records as favorites via the Accounts record view as an example:

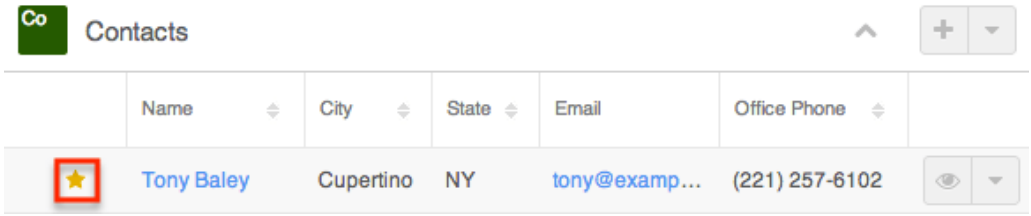
1. Navigate to an account's record view.
2. Click the star icon to the right of the account's name on the upper left of the record view to designate it as a favorite.
3. To remove the account as a favorite, click the star again to revert it to gray.




### Favoriting Via Subpanel

The following steps cover marking records as favorites via the subpanel in the Accounts record view as an example:

1. Navigate to an account's record view.
2. Click the star icon to the left of the desired record's row in the related record subpanel (e.g. Contacts).

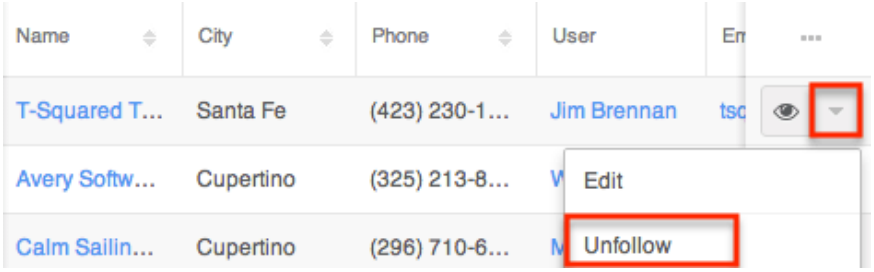



3. To remove the favorite designation, click the star again to revert it to gray.

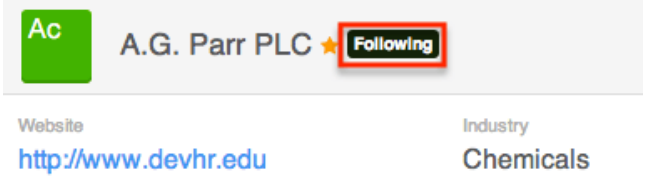
## Un-Following Records

User's can also choose to un-follow records that they no longer wish to view posts for in their activity stream. Please note that this will prevent all future posts as well as the associated comments from appearing in your Home page and List View activity stream. However, historical posts associated to the un-followed record will continue to appear in your activity stream. To un-follow a record via the list view, click the Record Actions menu then select "Unfollow". To un-follow a record via the record view, simply click the Follow button again to revert it to gray. Please note that you will automatically stop following a record should you loseaccess to a record in Sugar. Also, if you remove a record as a favorite, the following status will not change and you must un-follow the record accordingly.

From list view:




From record view:

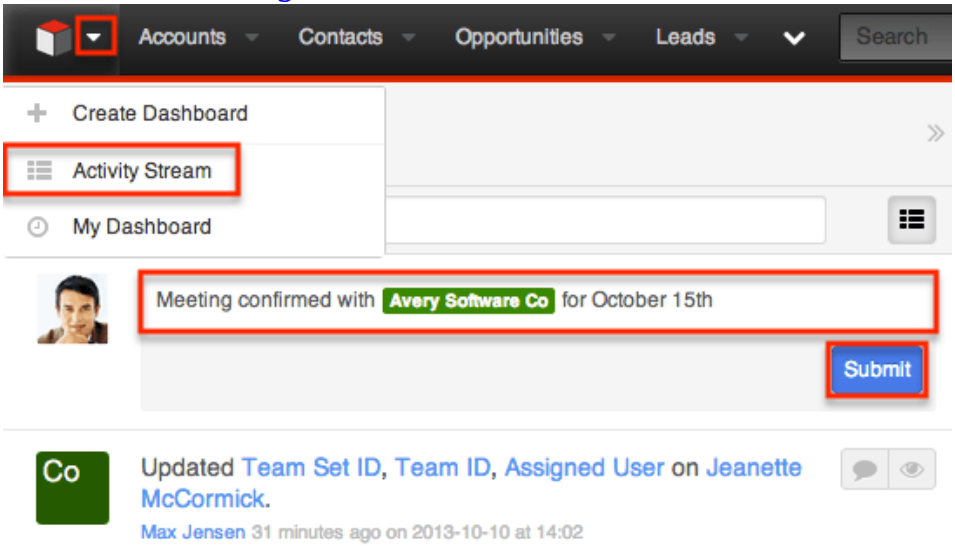


# Creating User Posts

Users can access the activity stream to view a list of activities performed in Sugar, track updates, as well as post messages to other users in their organization. To create a post, simply enter your message into the post input box at the top of the activity stream view then click "Submit". Please note that user posts display the user's profile image to the left of the post as the Post icon. For information on Post icons, please refer to the Post Icon section in this documentation. In addition to the Post icon, the timestamp of when the post was created and the user's name who created it will display as well. There are various options available when creating posts such as adding links, images, attachments, external messages, etc. You can also reference a specific Sugar record or user by typing @ followed by the users name (e.g. @John Smith) or # followed by the records name (e.g. #ABC Company) in your post. For more information on the different post options available, please refer to the User Post Options section of this documentation.

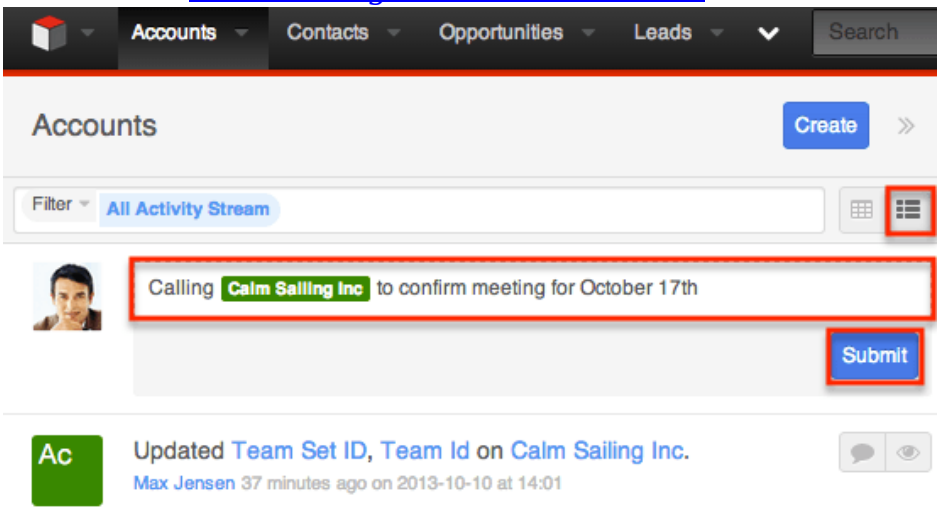
## Creating Via Home Page

The Home page activity stream can be accessed by clicking the triangle next to the Sugar cube icon then selecting "Activity Stream". The post input box displays beneath the Filter option and you can enter in your message then click "Submit" for the post to appear within the activity stream. Please note that user posts created via the Home page is viewable by all users in your organization. Posts that reference a specific record will also appear in that record view's activity stream as it is linked. For more information on referencing records in your post, please refer to the Referencing Users and Records section of this documentation.



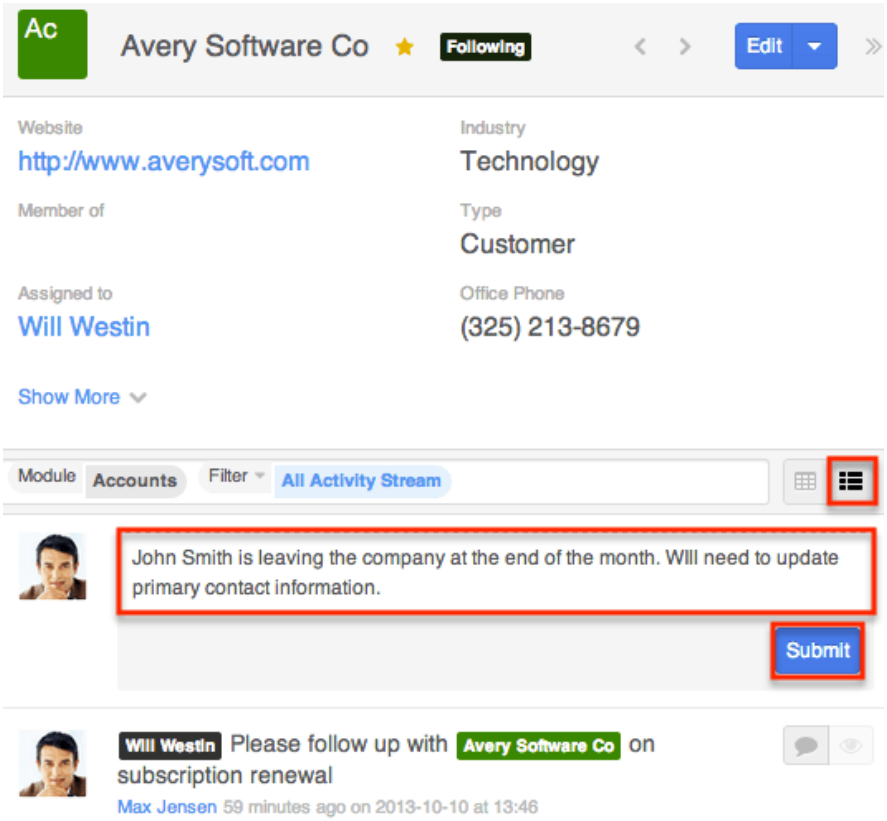

## Creating Via List View

The List View activity stream can be accessed by navigating to a module's list view (e.g. Accounts) then clicking the Activity Stream button to the right of the list view's search bar. You can create a user post by entering your message into the post input box then clicking "Submit". Please note that posts created via the list view activity stream is viewable in the record view's activity stream if the specific record's name is referenced in the post. Also, if you reference a user (e.g. @John Smith) in your post, they will see the post in their Home page activity stream as well. For more information on referencing records and users in your post, please refer to the Referencing Users and Records section of this documentation.




## Creating Via Record View

The Record View activity stream can be accessed by navigating to a module's record view (e.g. Avery Software Co) then clicking the Activity Stream button below the module's fields. To create a user post, simply enter in your message into the post input box then click "Submit". Please note that posts added via the record view activity stream are only viewable within that record's view unless a user is following the record. All posts appear on the Home page and List View activity stream for records you follow in Sugar. For more information on following records in Sugar, please refer to the Following Records section of this documentation.




# User Post Options

There are various options available when posting a message in the activity stream such as adding an attachment, external link, referencing Sugar records, etc. Users can easily drag and drop files, links, news feeds, etc. from their local machine, external sites, as well as Sugar dashlets. You can also mention a specific user in your post that you would like the message targeted to as well as reference records that you wish to link the post to in Sugar. Please note that every user in Sugar will be able to view the post if it's created via the Home page activity stream regardless of whether a specific user is mentioned in the post.

## Adding Rich Content and External Messages

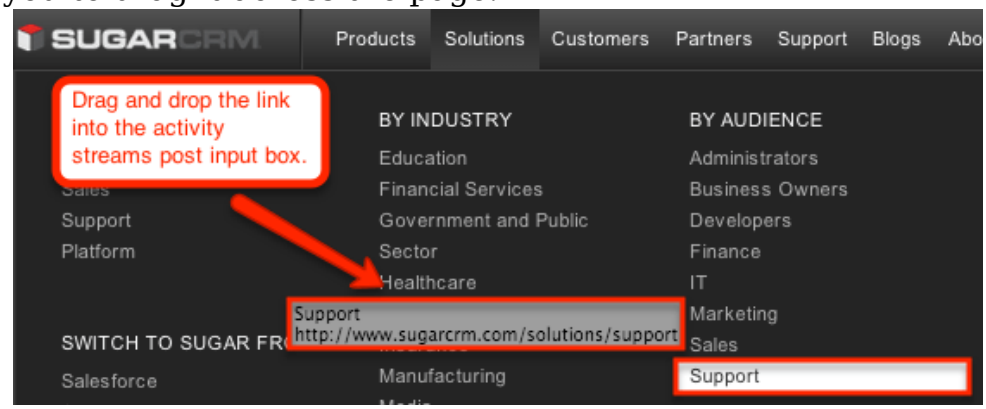
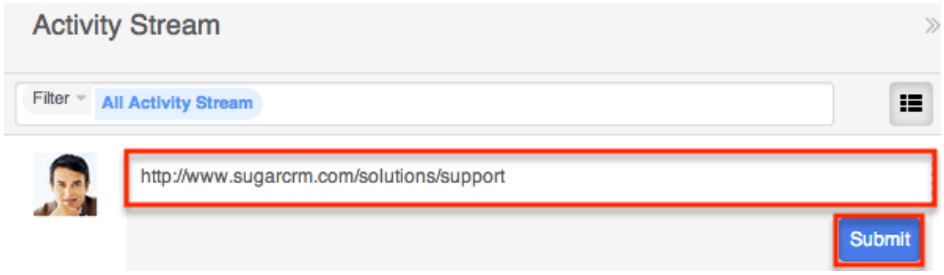
Users have the option to add external links, images, and videos as well external messages (e.g. tweets, news articles) into their user post. This allows you to easily share information across the organization by posting relevant links, videos, news articles, etc. that will be important for other users to view. For more information on previewing posts, please refer to the Previewing Posts section of this documentation.

To add external links, messages, etc., simply drag and drop the corresponding title that's linked to a URL into the post input box. For example, to add a video from

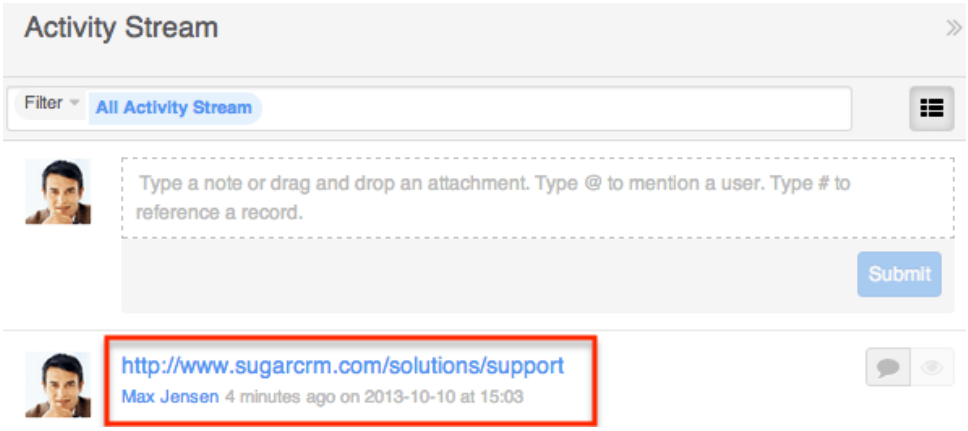
YouTube, click the title (e.g. "How to install SugarCRM") of the video then drag and drop the link that appears into the post input box. The URL along with the video will appear within the post once you submit it. For external twitter feeds, you will need to click the post date (e.g. 1 Aug) of the feed then drag and drop the link that appears into the post input box. To attach an image to your post, copy and paste the corresponding image URL into the post input box and the image will appear within the post once submitted.

You can also reference a specific record in the post if you wish to link the post to the record. For more information on referencing a record in your post, please refer to the Referencing Users and Records section of this documentation.

The following steps will cover adding an external link to the Home page activity stream as an example:

1. Go to an external site (e.g. www.sugarcrm.com) then select a link (e.g. Support link) you wish to add to your post.
   Note: The actual link will popup when you click the link on the site allowing you to drag it across the page.
   
   
2. Drag and drop the link into the post input box on your Home page activity stream then click "Submit".
   
   

The external link will display in the post on the Home page activity stream and will be viewable by all users in your organization.

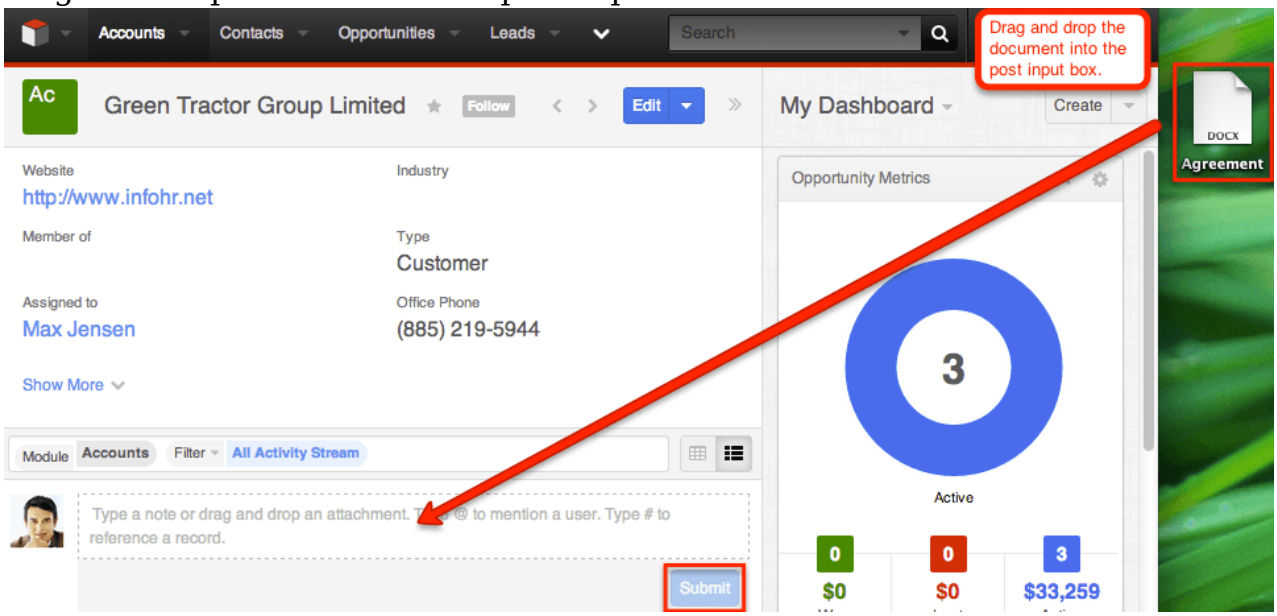



## Adding Attachments

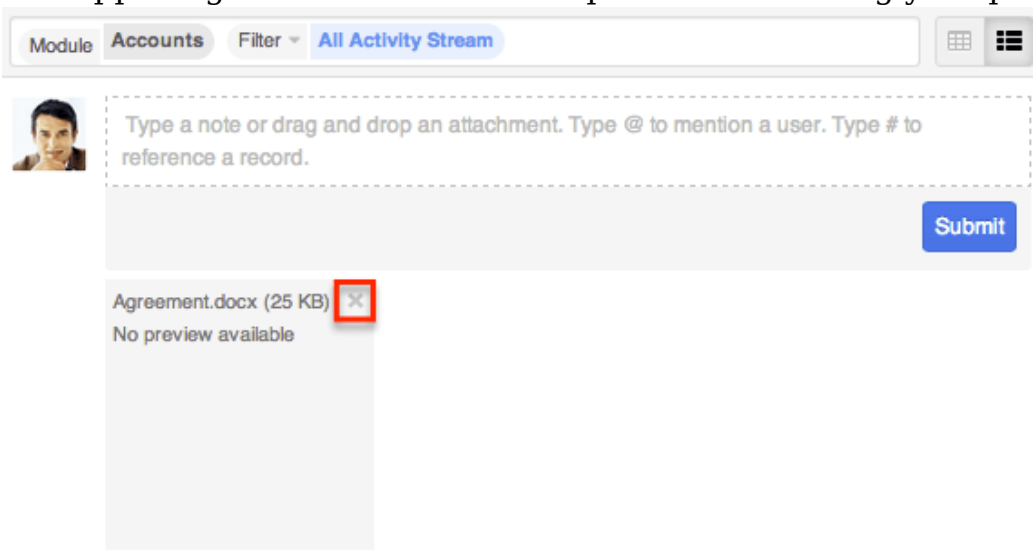
Users can also drag and drop files (e.g. Word, .CSV, Image) directly from their local machine (e.g. desktop) into the post input box to share various files with users in their organization. You can drag and drop more than one file into the post input box, but please note that each file will generate a separate post in the activity stream. The activity stream post generated from the attachment(s) will be a note-type post and will display an Nt icon. The note record created can be previewed in the intelligence pane by clicking the Preview button to the far right of the activity stream post. Clicking the attachment's file name within the preview will download the file for users to view or save to their local machine.

The following steps will cover adding a file from your desktop to the Account record view's activity stream as an example:

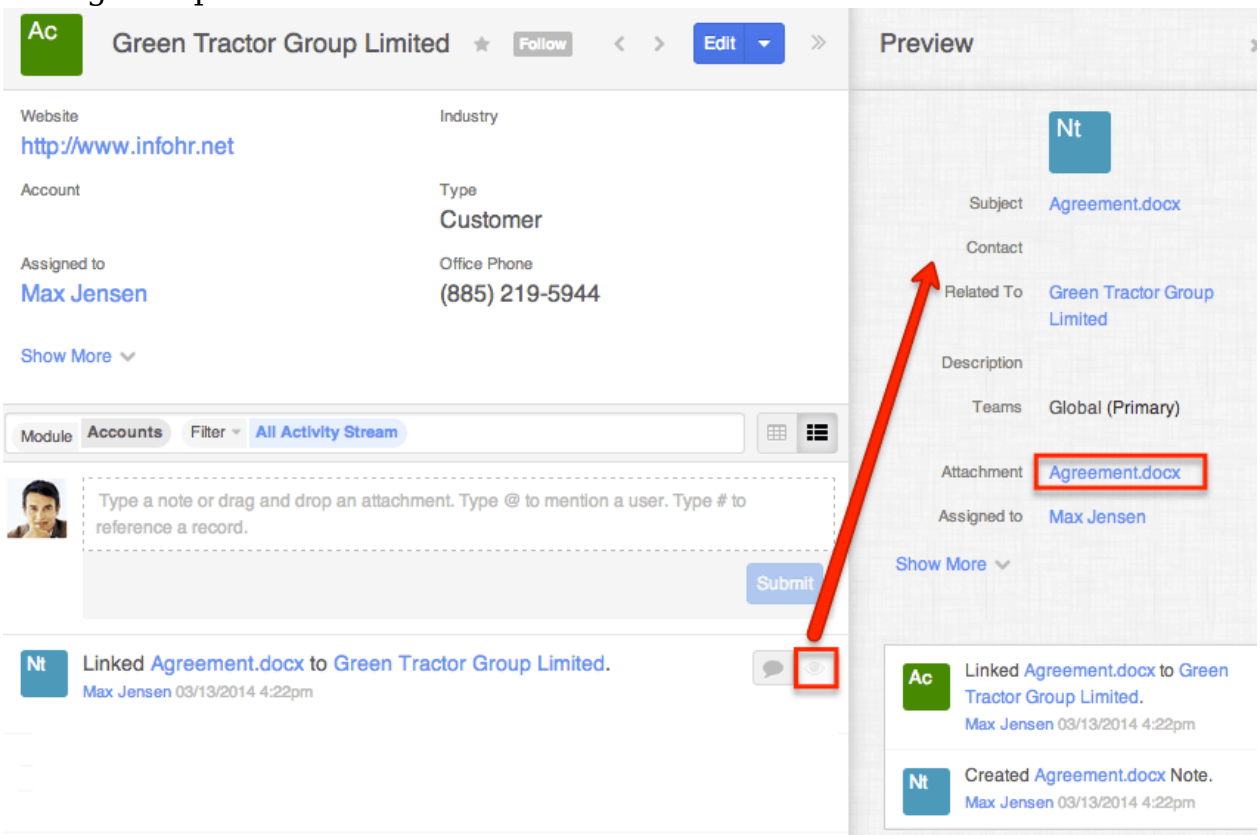
1. Locate the file on your desktop that you wish to attach to a post.
2. Drag and drop the file into the post input box.



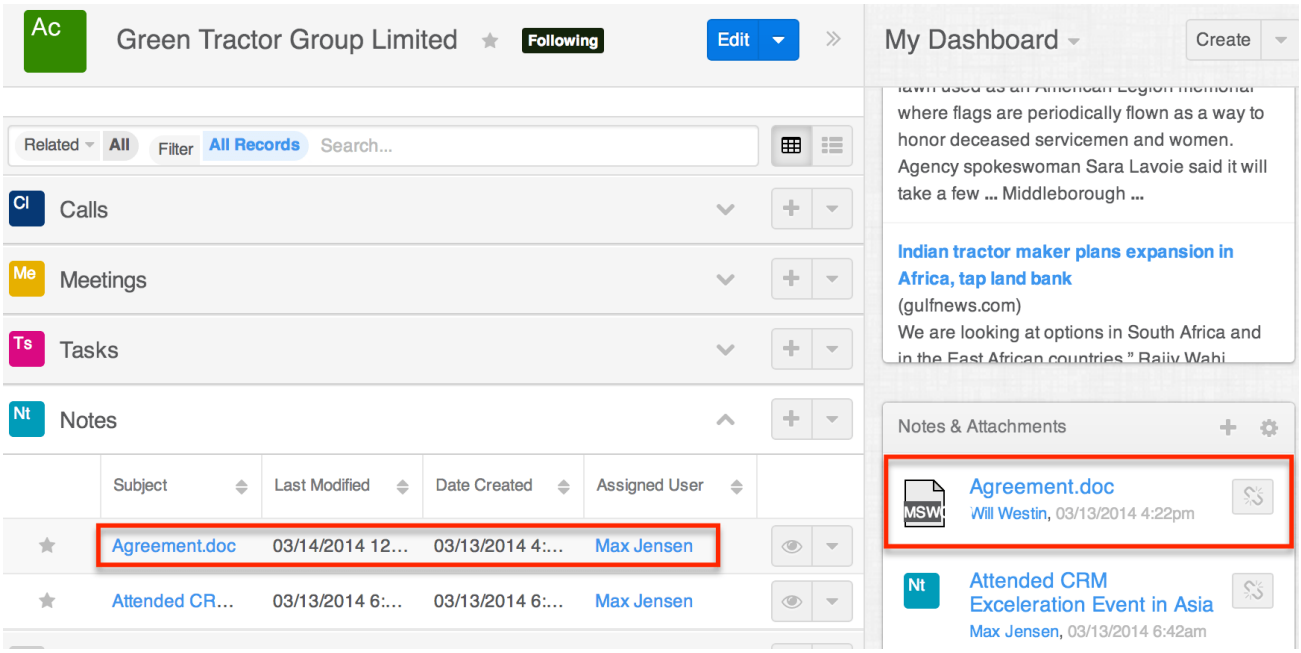
3. The attached file(s) will appear below the post input box. You can enter in a message if you wish and click "Submit" to post the file to the activity stream.
    - You can remove any unnecessary attachments by clicking the "X" on the upper right of the attached file prior to submitting your post.




The attached file will display as a post in the Account record view's activity stream and you can click the Preview button to view the note record that was created with the attached file. Please note that the new note record will also display activity stream posts indicating that a new note record was created and linked to the account record. You can click the note subject (Agreement.docx) from the intelligence pane to access the note record.

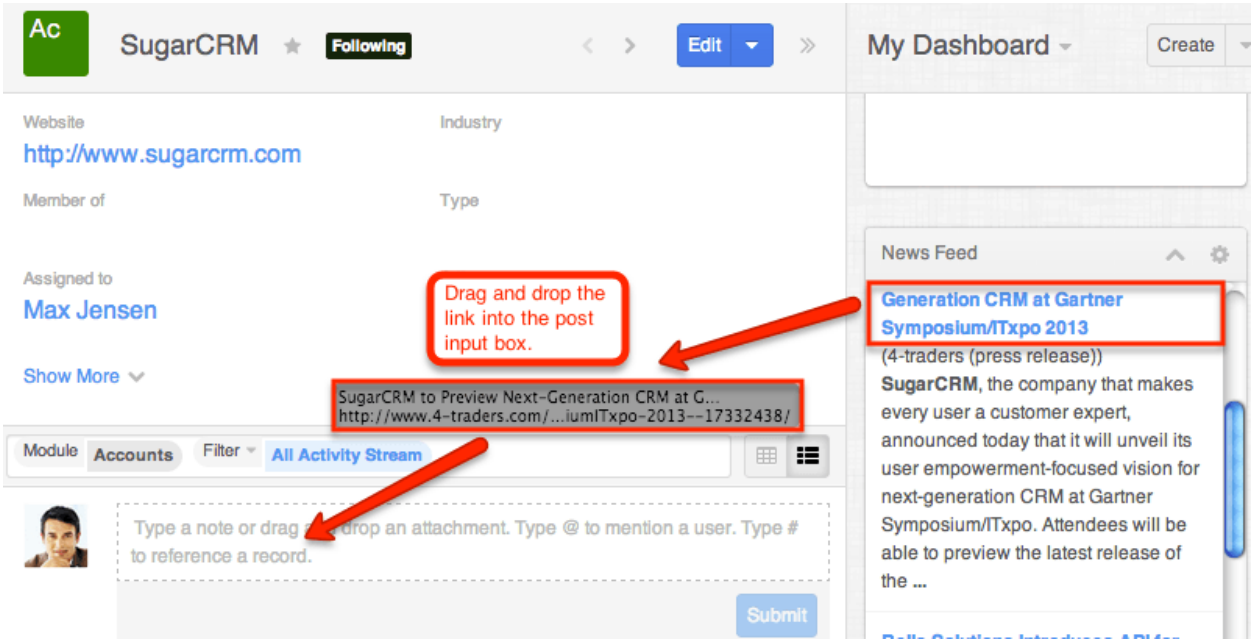


In addition, the newly created note record will appear in the Notes & Attachments dashlet in the account record view's intelligence pane as well as the related Notes subpanel. Please note that if any records are referenced in the post when posting the attachment, the note record created will not be linked to those records. If the Notes & Attachments dashlet is not displayed in the intelligence pane, you can add the dashlet by editing the dashboard. For more information on adding dashlets, please refer to the Adding Dashlets section of the Intelligence Pane documentation. If a new note is created via the Notes subpanel or Notes & Attachments dashlet, an activity stream post will be created indicating that a new note was linked to the record. Please note that you will need to refresh the page in order to view the corresponding activity stream post when a note is created or linked via the Notes & Attachments dashlet.




## Adding Via Dashlets

User's also have the option to drag and drop news feeds and twitter feeds directly from Sugar dashlets into user posts. The News Feed (Google) dashlet appears in the intelligence pane to the right of the account's record view. It displays news articles related to the specific account you are currently viewing. User's can drag and drop news articles from this dashlet into a post on the record view's activity stream. Simply click the news article title then drag and drop the link that appears into the post input box. Click "Submit" to post the news article link.

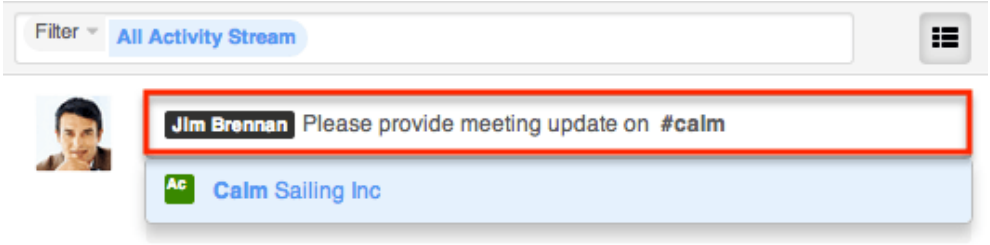



You can also add twitter feeds to your user post by dragging and dropping a specific feed from the Twitter dashlet. The Twitter dashlet can be added to the intelligence pane dashboard for the list view and record view. For more information on adding dashlets to the intelligence pane, please refer to the Intelligence Panedocumentation. Please note that administrators must first configure the Twitter connector in order for users to view twitter feeds. For more information on enabling connectors, please refer to the Enabling Connectors section of the System documentation in the Administration guide. To add a specific twitter feed to your post, click the feed post date (e.g. 1 Aug) in the dashlet then drag and drop the link that appears into the post input box for the list view or record view activity stream.

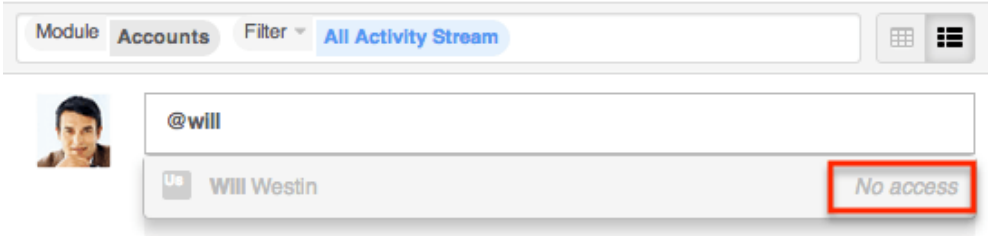
## Referencing Users and Records

Sugar record's and user's can be referenced within the user post if you wish to target the message to a specific user or relate the post to a specific record. To mention a user in your post, type @ followed by the user's name (e.g. @John Smith). Please note that even if a specific user is referenced, all user's will be able to view the post in Sugar if the post originated from the Home page activity stream. If the post originated from the list view or record view activity stream, then only the specific user mentioned in the post will be able to view the message on their Home page activity stream. To reference a record in your post, type # followed by the record's name (e.g. #calm). Please note that only module's enabled for Full Text Search via Admin > Search can be referenced in posts. For more information on how to enable modules for Full Text Search, please refer to the System documentation in the Administration guide.Posts that reference a specific record in Sugar will appear in that record view's activity stream. User's can access

the referenced record and user by clicking the highlighted record or user name within the post. Please note that you can reference more than one user and record in the same post.




As you type in the record name or user name, the type-ahead feature will begin to display matching results below the post input box. Simply select one of the matching users or records from the list then click "Submit" to post your message. Please note that a user must have view access to the record in order for you to be able to mention them w hen posting via the record view's activity stream. For example, if user Sally Jones does not have access to view ABC Company, you cannot reference Sally (e.g. @Sally Jones) when posting a message via the ABC Company record view's activity stream. If you try to mention a user without view access, their name will be displayed in gray in the results list with a message stating that they have no access.




Please note that you cannot preview users or records referenced in the post as the preview is disabled. You will get an error message (Preview disabled: No data available) when you hover on the Preview button to the right of the post. For more information on previewing posts, please refer to the Previewing Posts section of this documentation.

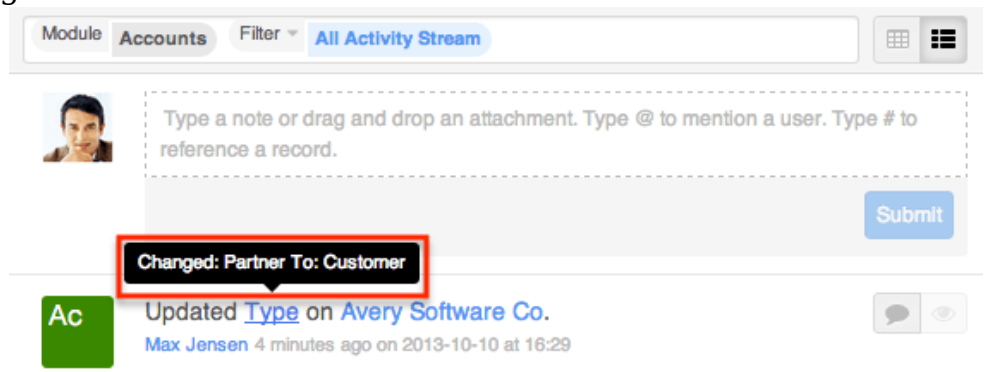
## Viewing Field Changes

Fields in Sugar that are marked as "Audit" via Admin > Studio will generate update posts in the activity stream whenever the field gets updated. For more information on marking fields for audit, please refer to the Studio documentation in the Administration guide. Please note that only audited fields will generate an update post in the activity stream.

Updates you make to audited fields in the record view will generate a post in the record view activity stream referencing the field name(s) that was updated (e.g. "Updated Type on ABC Company"). When you hover on the field's name within the

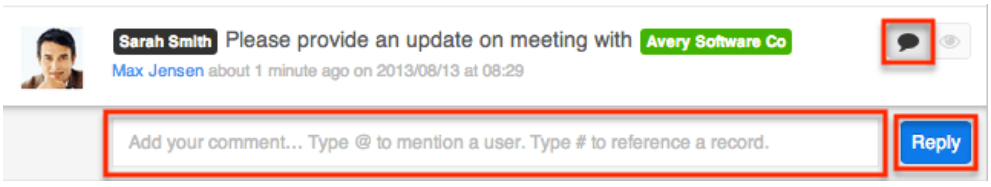
update post, the old and new values will display above the post. You will also be able to view the update post via the Home page and List View activity stream if you follow the record in Sugar. For more information on following records, please refer to the Following Records section of this documentation.

Please note that users who do not have access to view the audited field due to a role restriction, will see a generic update post (e.g. Updated ABC Company) on their activity stream as the field name will not be mentioned. For more information on roles, please refer to the Role Management documentationin the Administration guide.



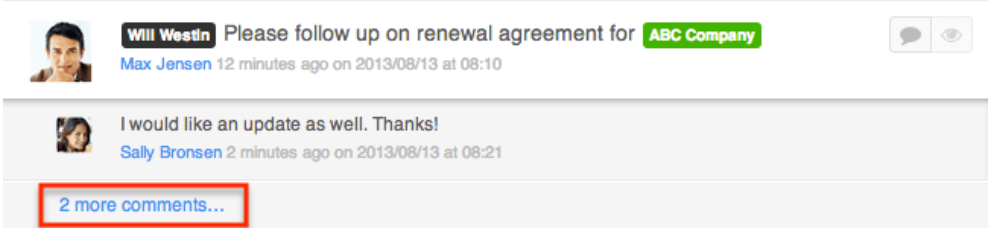

## Commenting on Posts

User's have the ability to respond to posts via the activity stream by clicking the Comment button to the right of each post. A comment box will appear below the post and you can type in your message then click "Reply" to post your comment. All associated comments will appear below the post in the activity stream and will display the timestamp of the comment along with the user's name who added the comment. You can mention a specific user by typing @ followed by the user's name (e.g. @Sarah Smith) or reference a specific record by typing # followed by the record's name (e.g. #ABC Company). For more information on referencing user's and record's in your post, please refer to the Referencing Users and Records section of this documentation. Please note that comments are visible to all users in Sugar unless they are no longer following the record. For more information on un-following records, please refer to the Un-Following Records section of this documentation.




When a user comments on a post, that post will move to the top of the activity stream once the page is refreshed. Please note that comments you add on the List View activity stream will appear on the Home page activity stream and vice versa if the post exists in both places. When there are multiple comments, the latest

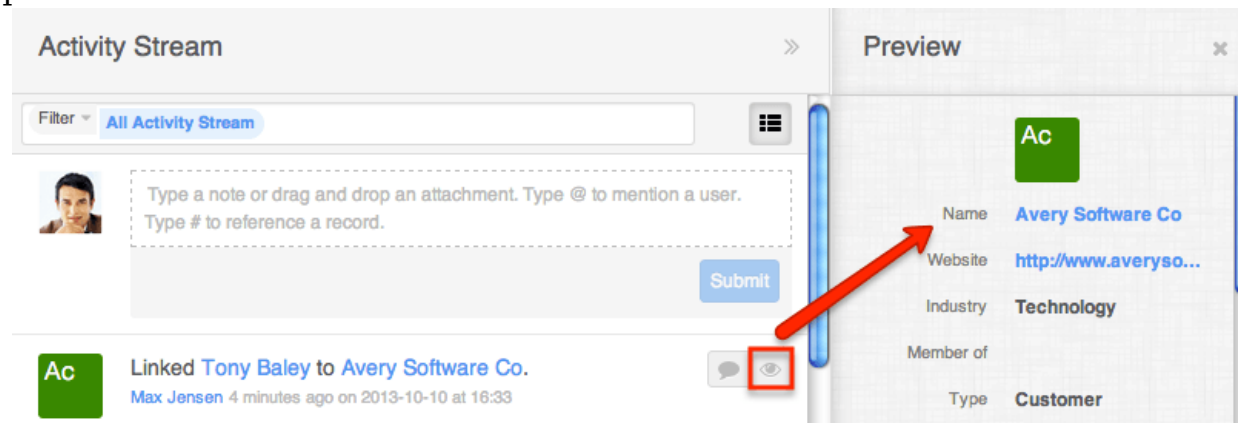
comment will appear on top and user's can click the link (e.g. 2 more comments...) below the comment to view all comments associated to the post. Once you click the link, all comments will display in cascading order with the most recent comments on top. To hide the comments again, simply refresh the activity stream page.




## Previewing Posts

User's can preview activity stream posts by clicking the Preview button to the far right of the post. The intelligence pane will display the record's details with key information regarding the record as well as any related activity stream information. Please note that preview is available for Create, Update, Link, and Unlink-type posts in the activity stream. To close the preview, simply click the "X" on the upper right of the intelligence pane.

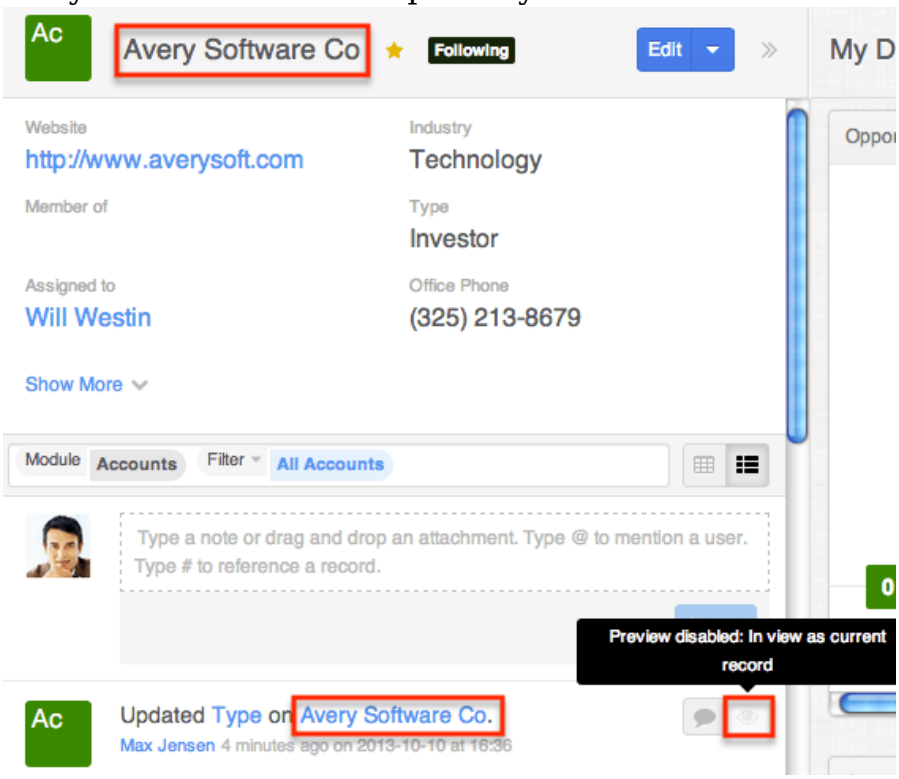
Also, messages posted via the Home page or List View activity stream cannot be previewed as records are not automatically referenced within the post. The Preview button will be grayed out and display a message ("Preview disabled: No data available") when you hover on the button. Messages posted via the record view can be previewed on the Home page and List View activity stream since the record is automatically referenced within the post. For linked and unlinked type posts, only the primary record that is linked or unlinked to can be previewed via the intelligence pane. For example, the below post states that Tony Baley is now linked to Avery Software Co. Since Avery Software Co is the primary record that the contact is now linked to, Avery Software Co will display when previewing the post.




Please note that records for modules using the Legacy user interface cannot be previewed if included in the post (e.g. Link-type post) and will generate an error

message ("Legacy modules cannot be previewed") when you hover on the button. For more information on the Legacy user interface, please refer to the User Interface (Legacy Modules) documentation.

Also when you are viewing a record in record view, you cannot preview a post that references the same record. For example, if you are viewing Avery Software Co's record view and there is an update post referencing Avery Software Co in the record view's activity stream, you will not be able to preview any posts where Avery Software Co is the primary record.




Last Modified: 09/26/2015 05:23pm

# Intelligence Pane

## Overview

Sugar's intelligence pane displays to the right of the Home page activity stream, module's list view, and record view and provides users with valuable record information via various dashlets (e.g. Planned Activities, History, My Accounts, etc.). Users can also easily preview a record's detail via the intelligence pane. All intelligence panes will display the "My Dashboard" by default, which will include some stock dashlets (e.g. Planned Activities, History, etc.). Users can add additional dashlets as desired as well as create new dashboards to group a different set of dashlets together per their viewing preference. This documentation

will go over the basics of the intelligence pane as well as the various options available when viewing the dashboard, configuring the dashboard, adding dashlets, etc.

# Dashboards

Sugar's Intelligence pane consists of dashboards where you can group certain dashlets together based on the information you would like to view. Both the "Help Dashboard" and "My Dashboard" comes out-of-the-box with Sugar. By default, the Help dashboard displays when users initially access a module's list view and record view. The dashboard provides specific information pertaining to the module you are currently viewing along with a link to the corresponding documentation (e.g. Leads documentation) in the Application guide for more information. Please note that if there is no help content available for a module, there will be a message stating that no data is available. You can view the My Dashboard by simply clicking the triangle next to Help dashboard" and selecting "My Dashboard". Please note that Sugar will remember the state of your intelligence pane meaning the dashboard you most recently viewed will display the next time you return to the module's page.

Users also have the option to modify (if applicable) the dashlets that appear in the dashboard, change the dashboard names, as well as create new dashboards if they wish. Please note that the Help dashboard cannot be deleted and only the Help dashlet is available to add to the dashboard.

## Viewing Dashboards

There are various options available for viewing intelligence panes in Sugar including via the module's list view and record view. The intelligence pane displays various dashlets which provide users with valuable record information. Users can create new dashboards to house a different set of dashlets together as well as add additional dashlets to view key information regarding the record(s). For more information on creating dashboards, please refer to the Creating Dashboards section of this documentation.

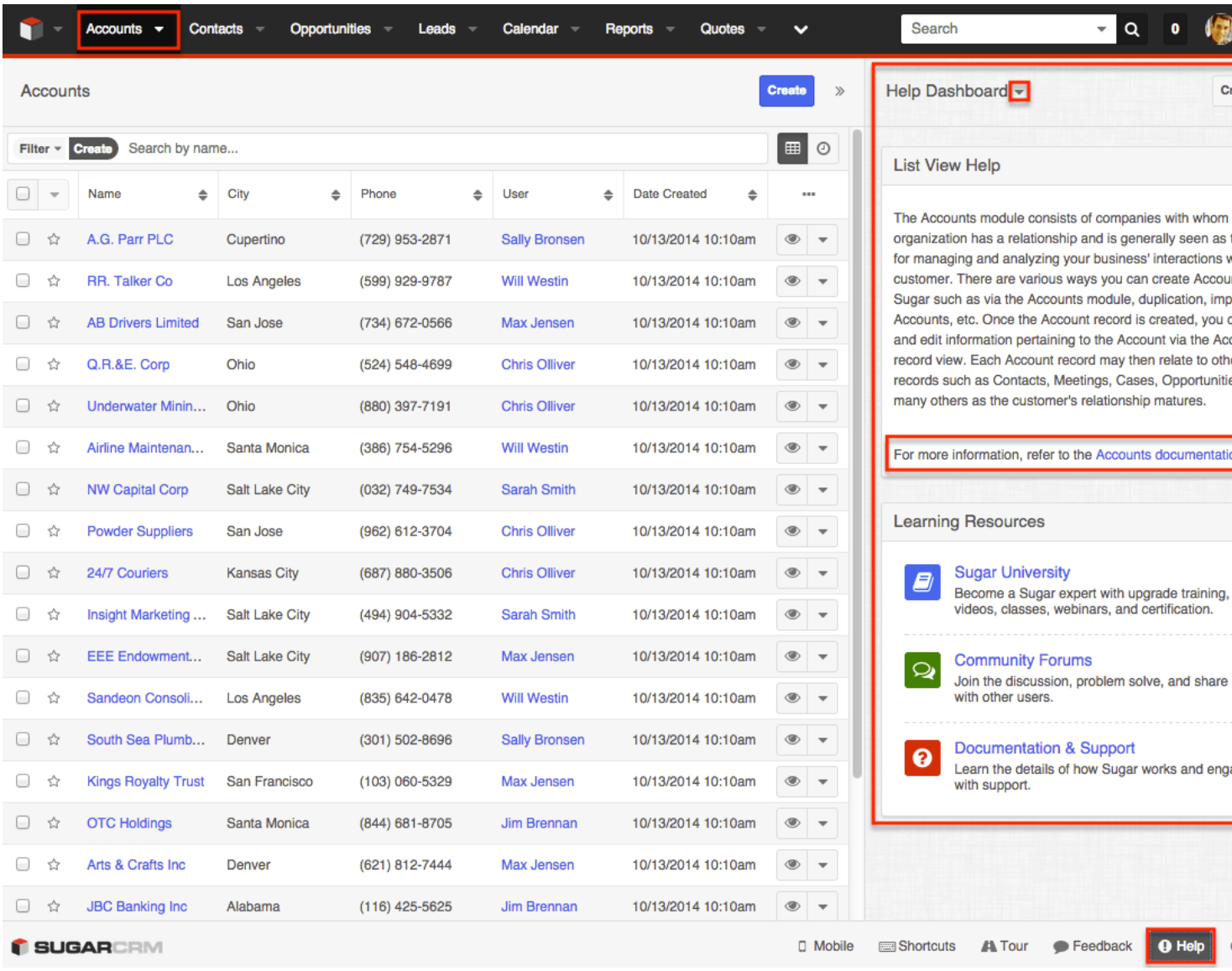
### Viewing Via List View

The list view's intelligence pane can be accessed by clicking the specific module tab (e.g. Contacts) at the top of the navigation bar to open the list view. By default, the list view's intelligence pane will display the Help Dashboard to the right of the screen along with the List View Help dashlet and Learning Resources dashlet. The List View Help dashlet provides users with a brief introduction to the module and

includes a link to the corresponding documentation (e.g. Accounts documentation) in the Application guide should you wish to view more information. In addition, the Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. Please note that clicking the Help icon in Sugar's footer allows you to toggle between viewing the list view's Help dashboard and hiding it. Simply click the Help icon or select the "Help Dashboard" again from the list view's intelligence pane to revisit the dashboard.

You can access the My Dashboard by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". The My Dashboard will display some stock dashlets (e.g. My Accounts, etc.) by default, and users can add additional dashlets if they wish by editing the dashboard. For more information on adding dashlets, please refer to the Adding Dashlets section of this documentation. You can also create new dashboards to group different sets of dashlets together per your viewing preference.

Please note that Sugar will remember the state of your intelligence pane meaning the dashboard you most recently viewed will display the next time you return to the module's page.



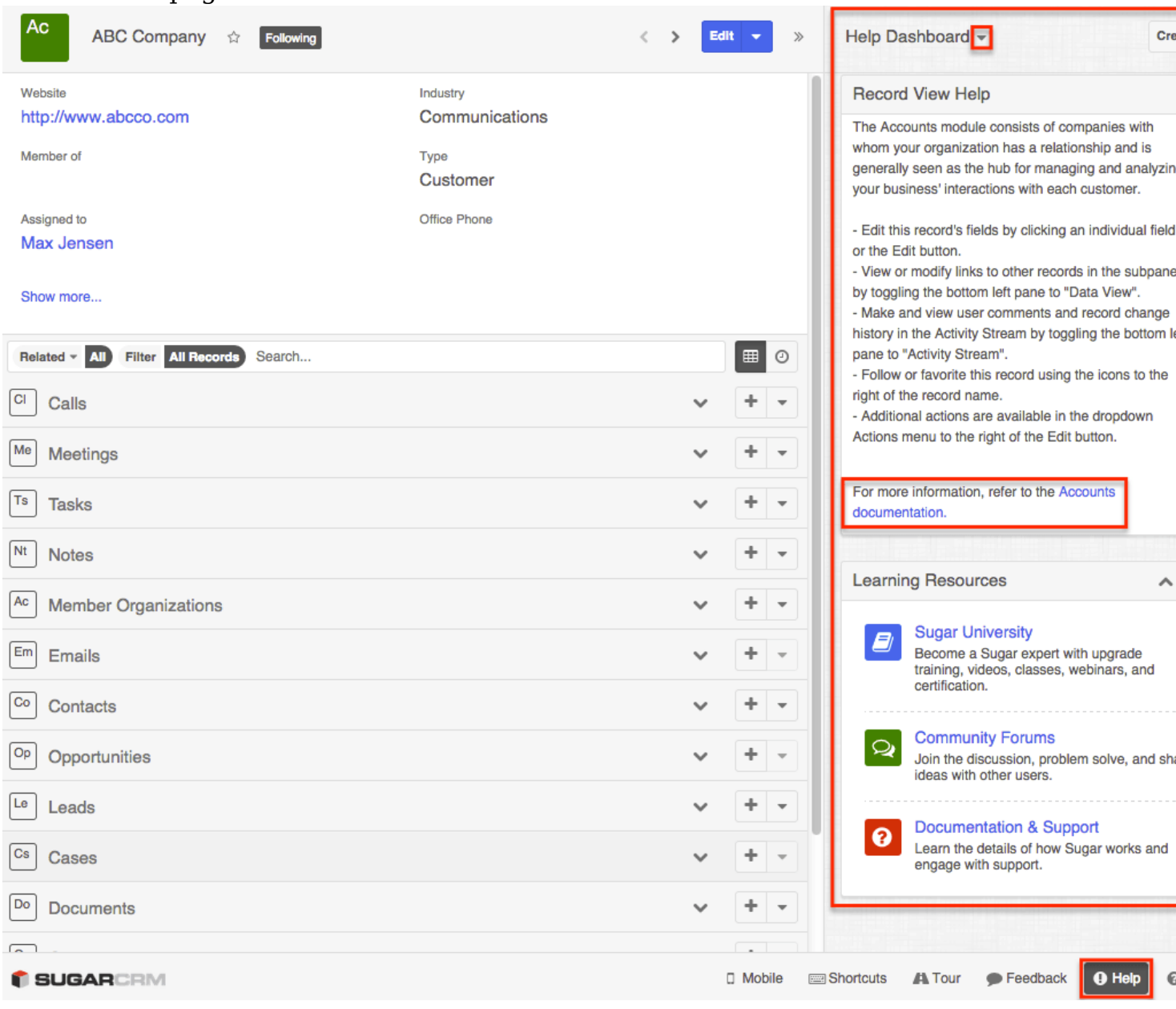

## Viewing Via Record View

The record view's intelligence pane can be accessed by navigating to a module's record view (e.g. Accounts record view). By default, the Help Dashboard displays to the right of the screen along with the Record View Help dashlet and Learning Resources dashlet. The Record View Help dashlet provides users with a brief introduction to the module along with some instructions to help users utilize the record view. To access the corresponding documentation in the Application guide, simply click the documentation link (e.g. Accounts documentation) in the dashlet. In addition, the Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. Please note that clicking the Help icon in Sugar's footer allows you to toggle between viewing the record view's Help Dashboard and hiding it. Simply click the Help icon or select the "Help Dashboard" again from the record

view's intelligence pane to revisit the dashboard.

You can access the My Dashboard by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". The My Dashboard will display some stock dashlets (e.g. Planned Activities dashlet, History dashlet, etc.) by default, and users can add additional dashlets if they wish by editing the dashboard. For more information regarding these dashlets, please refer to the Commonly Used Dashlets section of this documentation. For more information on adding dashlets, please refer to the Adding Dashlets section of this documentation. You can also create new dashboards to group different sets of dashlets together per your viewing preference.

Please note that Sugar will remember the state of your intelligence pane meaning the dashboard you most recently viewed will display the next time you return to the module's page.

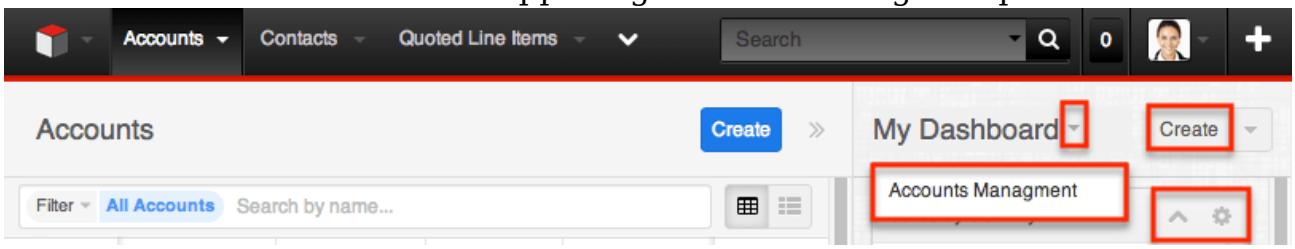


## Creating Dashboards

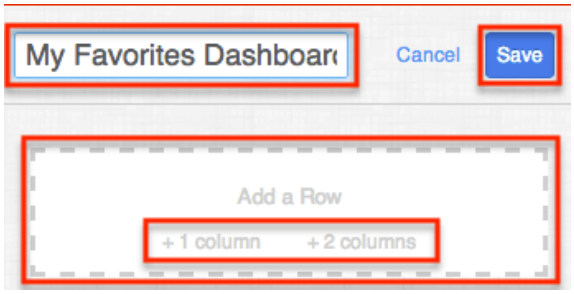
Users can create new dashboards if they wish to group a different set of dashlets together outside of the default dashboard (i.e. My Dashboard). This will allow you to easily view the information you need in one place via the specific dashlets grouped under each dashboard.

The following steps cover creating a new dashboard called "My Favorites Dashboard" in the Accounts list view intelligence pane as an example:

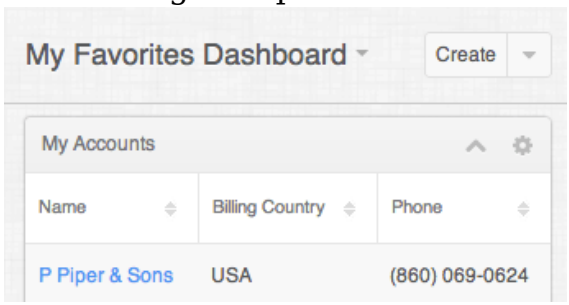
1. Click the Create button on the upper right of the intelligence pane.




2. Enter in the name for the new dashboard (e.g. My Favorites Dashboard).
    - You can add dashlets to the new dashboard by adding rows along with the number of columns to display the dashlet(s). For more information on adding dashlets, please refer to the Adding Dashlets section of this documentation.

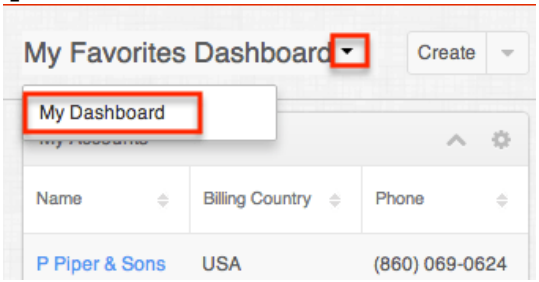



3. Click "Save" to create the new dashboard.
    - The newly created dashboard will now display on the list view's intelligence pane.



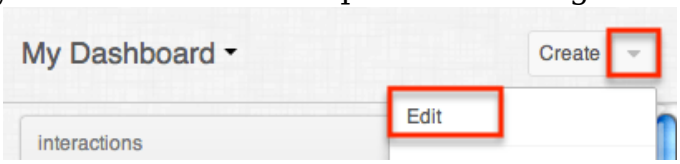

## Switching Between Dashboards

Users have the option to create multiple dashboards to house various dashlets per their viewing preference. For more information on creating new dashboards, please refer to the Creating Dashboards section of this documentation. Once a dashboard is created, users can easily access them by clicking the triangle next to the currently displayed dashboards name on the upper left then selecting the specific dashboard.




## Configuring Dashboards

Users can easily configure their dashboards to display the information based on their viewing preference. Simply click the triangle to the right of the Create button and select "Edit" to access the dashboard's edit layout. Dashlets can be added, edited, rearranged, etc. based on the information you wish to view and how you wish to view it on the dashboard. Once the appropriate changes have been made, you can click save to push the changes to the final dashboard view.

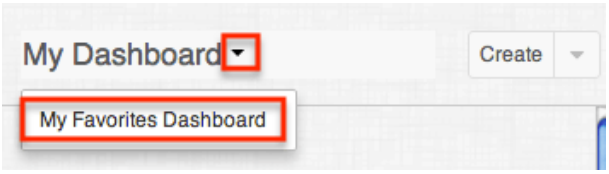



## Renaming Dashboards

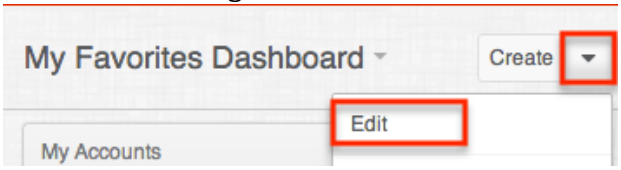
Users can change their dashboards to display different names if they wish by clicking the triangle next to the Create button then clicking "Edit". Once the dashboards edit layout opens, you can enter in the new name then click "Save" to preserve the change.

The following steps cover renaming the My Favorites Dashboard on the intelligence pane as an example:

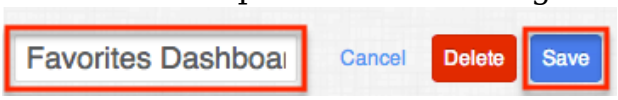
1. Click the triangle next to the dashboard's name on the intelligence pane then select "My Favorites Dashboard".




2. Click the triangle next to the Create button then select "Edit".




3. Enter the new name in the open text field (e.g. "Favorites Dashboard") then click "Save" to preserve the change.

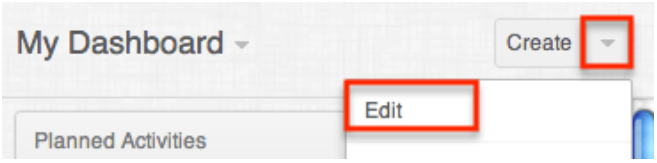



## Deleting Dashboard Rows

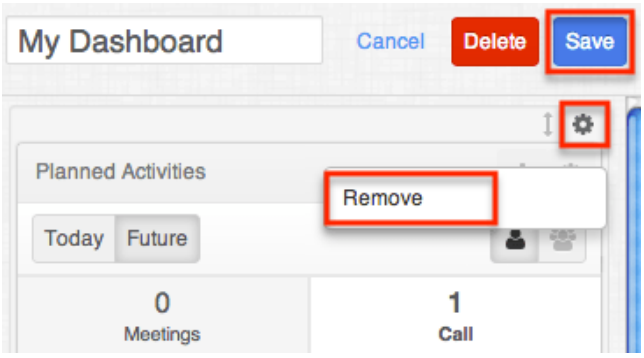
Users can also delete specific dashboard rows within the intelligence pane, which will remove all dashlets in the row they no longer wish to view. Please note that deleted dashlets are not permanently removed and can be addedback by editing the dashboard. For information on adding dashlets to your dashboard, please refer to the Adding Dashlets section ofthis documentation.

The following steps cover deleting a dashboard row from the Contact record's intelligence pane as an example:

1. Navigate to a contact records intelligence pane.
    - If multiple dashboards exist within the intelligence pane, select the specific dashboard to view. For more information on viewing other dashboards, please refer to the Switching Between Dashboards section of this documentation.
2. Click the triangle next to the Create button on the upper right of the dashboard, then select "Edit".




3. Click the Gear icon on the upper right of the dashboard row you wish to delete, then select "Remove".



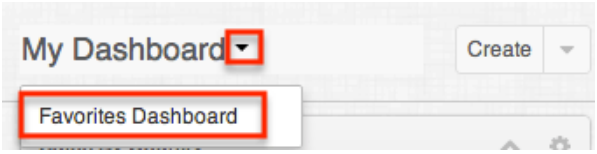

4. Click "Save" to preserve the changes.

## Deleting Dashboards

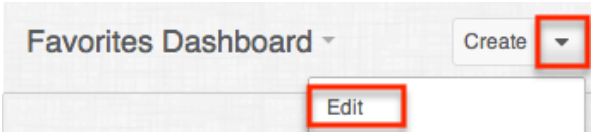
Users can easily delete dashboards they no longer wish to view on their intelligence panes. Please note that the Help dashboard cannot be deleted from Sugar. Keep in mind that the dashlets housed within the dashboard(s) are not permanently removed and can be added to other new and existing dashboards as desired. For more information on how to add dashlets to dashboards, please refer to the Adding Dashlets section of this documentation. If all dashboards are deleted from your intelligence pane, then simply click the Help icon in Sugar's footer to view the Help dashboard again.

The following steps cover deleting the "Favorites Dashboard" from the intelligence pane as an example:

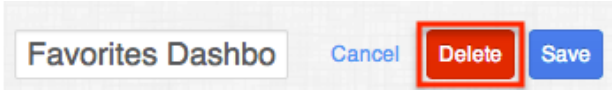
1. Click the triangle next to the dashboard's name on the upper left then select "Favorites Dashboard".




2. Click the triangle next to the Create button then select "Edit".




3. Click the Delete button on the upper right of the dashboard.




4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

# Dashlets

Dashlets reside within the dashboard and provides users with valuable information regarding record's for their organization. By default, there are stock dashlets that come out-of-the-box with Sugar and users can easily add them to various dashboards per their viewing preference. Please note that each dashlet can be configured to display the necessary information you wish to view. For more information on configuring the dashlet, please refer to the Editing Dashlets section of this documentation.

## Commonly Used Dashlets

By default, the intelligence pane's "My Dashboard" will include some stock dashlets such as "History", "Planned Activities", etc. Users have the option to add additional dashlets as they wish to the intelligence pane. For more information on adding dashlets, please refer to the Adding Dashlets section of this documentation. Please note that the dashlets (e.g. Opportunity Metrics, Cases Summary, etc.) available to view and add will vary between the modules in Sugar. The following sections will go over some commonly used dashlets which can be viewed and managed via the dashboard.

### List View Dashlet

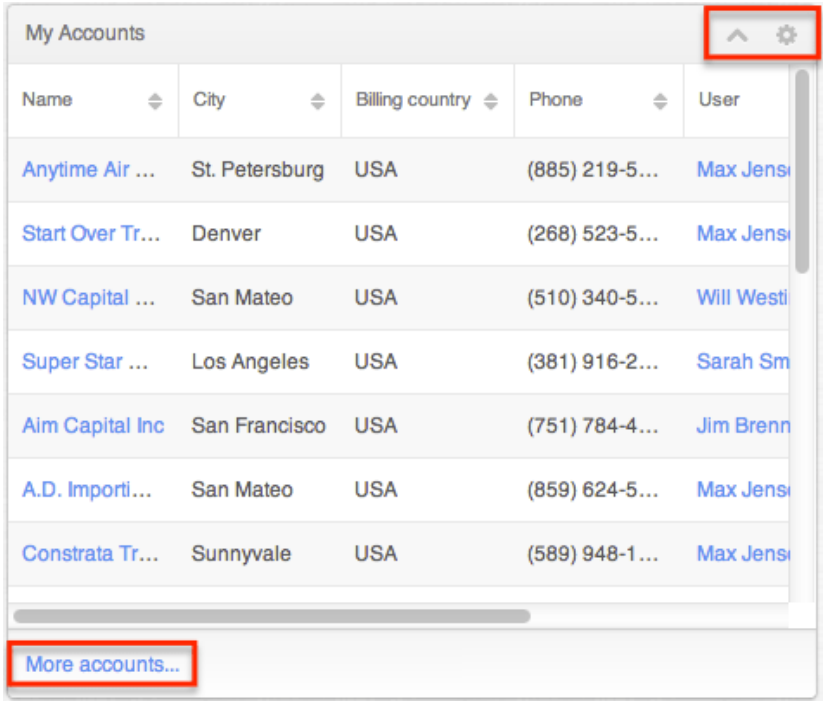
The List View dashlet enables users to view a list of records for a specific module (e.g. Accounts, Contacts, Leads, etc.) in Sugar. When configuring the dashlet, simply select the primary module (e.g. Accounts, Contacts, Leads, etc.) you wish to view a list of records for along with the filters (e.g. columns, display rows, etc.) you wish to apply. Please note that the dashlet title (e.g. My Accounts, My Contacts, etc.) will vary based on the primary module selected when adding the dashlet. Certain modules (Accounts, Contacts, Leads, etc.) in Sugar display the List View dashlet by default in their list view's intelligence pane. For example, if you navigate to the Contacts list view, the My Accounts dashlet will appear in the intelligence pane dashboard.

Once added, you can configure the dashlet as necessary by clicking the Gear icon on the upper right if you wish to change the designated module for the dashlet, apply pre-defined or custom filters, etc. Please note that any changes made by the administrator to the List View layout in Studio affects the list of available fields in the module's list view dashlet layout. The deployed changes will not display automatically in the corresponding module dashlet and users will need to edit the dashlet in order to view the changes in the Columns field , add new fields to the layout, etc. For more information on editing the List View layout in Studio, please refer to the Studio documentation in the Administration guide.

When viewing the List View dashlet, the first set of records meeting the filter

criteria will be displayed, and you can click the More link (e.g. More accounts) at the bottom of the dashlet to display additional records. The number of records that load each time you click the link depends on the display row number (5, 10, 15, 20) selected in the Configuration Options page . Simply scroll down the dashlet list view to view all records that are loaded. Please note that dashlets set to display 5 rows will show the dashlet's height increasing slightly when initially clicking the More "Module" link to display more records at once. Any subsequent clicks on the link will load the next set of results and be viewable by scrolling. The More link will no longer appear once all records meeting the dashlet's filter criteria are loaded in the dashlet list view results.

Multiple List View dashlets can be added to the intelligence pane as well if you wish to view the list of records for various modules. For more information on adding dashlets, please refer to the Adding Dashlets section of this documentation. You can also refresh and remove the dashlet by clicking the Gear icon. To collapse the dashlet, simply click the Up arrow to the left of the Gear icon.




Active Tasks Dashlet

The Active Tasks dashlet allows users to view outstanding tasks that require attention and need to be completed on a future or current date. The dashlet is broken up into three tabs, "Due Now", "Upcoming", "To Do", and displays a number on each tab to indicate the relevant count of open tasks falling into each due date range. To view tasks that are due on the current date, simply click the Due Now tab and any tasks that are currently due will be listed. Please note that any open tasks where the due date is prior to the current date will also display under this tab with an Overdue status in red. The Upcoming tab displays all

assigned tasks that have a due date in the future. The To Do tab will display tasks that have no due date set. If a task only has a start date defined but no due date, then it will appear under the To Do tab. You can also close tasks as completed directly from the dashlet by clicking the Completed button to the right of the task's row. In addition, you can delete the task's relationship with the record by clicking the Unlink button to the right of the Completed button.



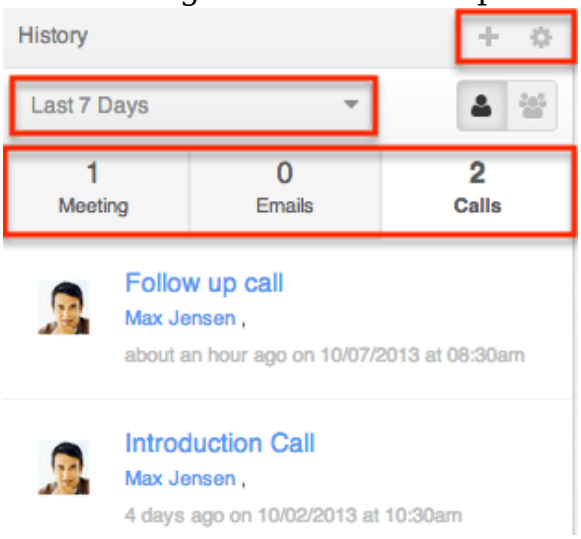

There are two buttons on the upper right of the dashlet which allow you to toggle between viewing tasks assigned to you and tasks assigned to users on your team. You can click the one person button to quickly view task records for which you are the owner. To view task records for all users on your team, simply click the group button to the right of the one person button. You can also relate new tasks to the record by clicking the Plus icon on the upper right of the dashlet and selecting "Create Task". Complete the Tasks record view layout and save to create the new task. To access a task's record view, simply click the task's subject in the dashlet. The Gear icon to the right of the Plus icon allows you to edit, refresh, close, and remove the dashlet accordingly. To collapse the dashlet, click the Gear icon then select the Close option. To expand the dashlet, you can simply click the Gear icon again and select "Open"

History Dashlet

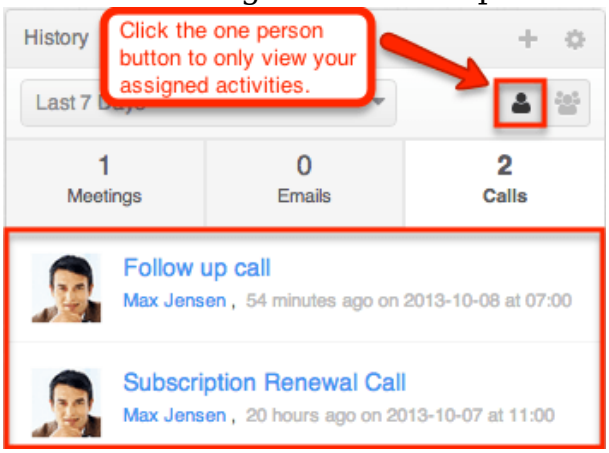
The History dashlet allows users to view a history of the record's related activities (e.g. calls, meetings, emails) that have already taken place. The activity types are broken up into three tabs (Meetings, Emails, Calls) and displays a number on each tab to indicate the relevant count of historical activity records. You can also filter (Last 7 Days, Last 30 Days, Last Quarter) the History dashlet to only display a specific subset of the activities meeting the set time frame.

Clicking the Plus icon on the upper right of the dashlet displays the Archive Email option which allows users to manually enter received emails for historical purposes. An explicit relationship is formed between an archived email and the current record while implicit relationships are also created to other records based any email addresses entered in the email. Simply enter in the required information

(e.g. Date Sent, From, Subject) along with the email body in the Compose Email window, then click "Archive" to save the email record. Please note that the archived email will display in the record's Emails subpanel as well as in the History dashlet. The Gear icon to the right of the Plus icon allows you to edit, refresh, close, and remove the dashlet accordingly. To collapse the dashlet, click the Gear icon then select the Close option. To expand the dashlet, you can simply click the Gear icon again and select "Open".




In addition there are two buttons on the upper right of the dashlet which allow you to toggle between viewing the record's activities assigned to you and activities assigned to users in other teams. You can click the one person button to quickly view the record's calls, meetings, and emails for which you are the owner. To view the record's activities for all users on your team, simply click the multi-group button to the right of the one person button.




Planned Activities Dashlet

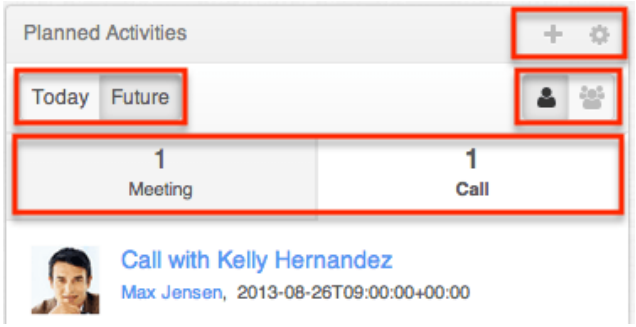
The Planned Activities dashlet provides users with a list of open or upcoming calls and meetings that are related to the current record you are viewing. The activity types are broken up into two tabs (Meeting, Call) and displays a number on each

tab to indicate the relevant count of planned activity records. You can filter the dashlet to view either the current day's scheduled activities or upcoming activities in the future by toggling between the Today or Future button. Please note that any open activities where the start date is prior to the current date will display an Overdue status for the specific activity in the dashlet. Once the activities have taken place or are completed, they will appear within the History dashlet.

In addition there are two buttons to the right which allow you to toggle between viewing the record's scheduled activities assigned to you and activities assigned to users in other teams. Please note that you can use both sets of buttons (Today, Future, one person, multi-group) concurrently to further filter and view the information you need. For example, you can click the one person button plus the Future button if you wish to view all upcoming activities specifically assigned to you for the current record.

To create a new meeting or call, simply click the Plus icon on the upper right of the dashlet and select either "Schedule Meeting" or "Log Call". Once the Meeting or Call record view layout opens, enter the necessary information and click "Save" to create the activity. For more information on creating calls and meetings in Sugar, please refer to the Calls and Meetings documentation.

The Gear icon on the upper right of the dashlet allows you to edit, refresh, close, and remove the dashlet accordingly. To collapse the dashlet, click the Gear icon then select the Close option. To open up the dashlet, you can simply click the Gear icon again then select "Open".

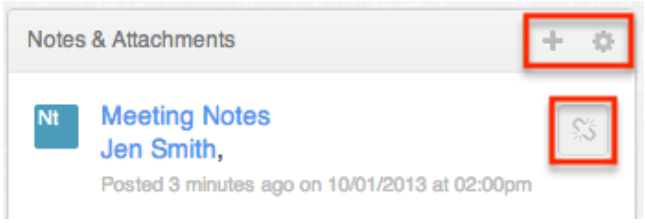



Notes & Attachments Dashlet

The Notes & Attachments dashlet allows users to relate an existing note as well as a new note record to the module record. To create a new note, click the Plus icon on the upper right of the Notes & Attachments dashlet then select "Create Related Record". Once the Notes record view layout opens, enter the necessary information then click "Save". For more information on creating notes, please refer to the Notes documentation. To relate an existing note, click the Plus icon then select "Link Existing Record". The Search and Select Notes page will open allowing you to select the note record you wish to relate to the module record.

To delete the record's relationship to a note record, click the Unlink button to the right of the attached note post. Please note that this removes the relationship, but does not delete the record itself.

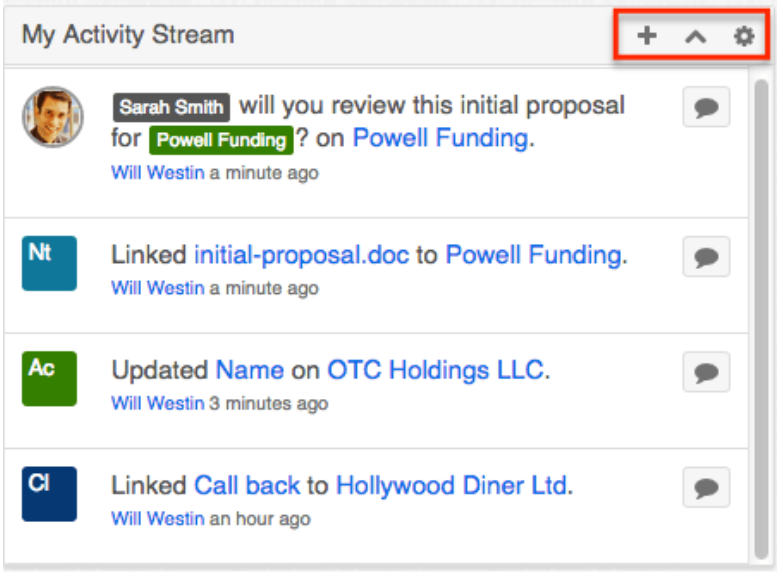
The Gear icon on the upper right of the dashlet allows you to edit, refresh, close, and remove the dashlet accordingly. To collapse the dashlet, click the Gear icon then select the Close option. To open up the dashlet, you can simply click the Gear icon again then select "Open".




My Activity Stream Dashlet

The My Activity Stream dashlet displays the user's main Activity Stream within a dashboard, eliminating the need to navigate to the Activity Streams view to monitor the most recent stream activities. Like other Activity Stream views, the dashlet supports inline commenting on specific stream activities, but it does not allow record previews. For more information on Activity Streams, please refer to the Activity Streams documentation.

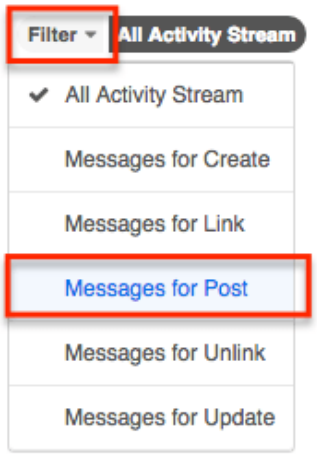
The Gear icon on the upper right of the dashlet allows you to edit, refresh, and remove the dashlet accordingly. To collapse the dashlet, click the Up arrow to the left of the Gear icon. To open up the dashlet, you can simply click the arrow again.



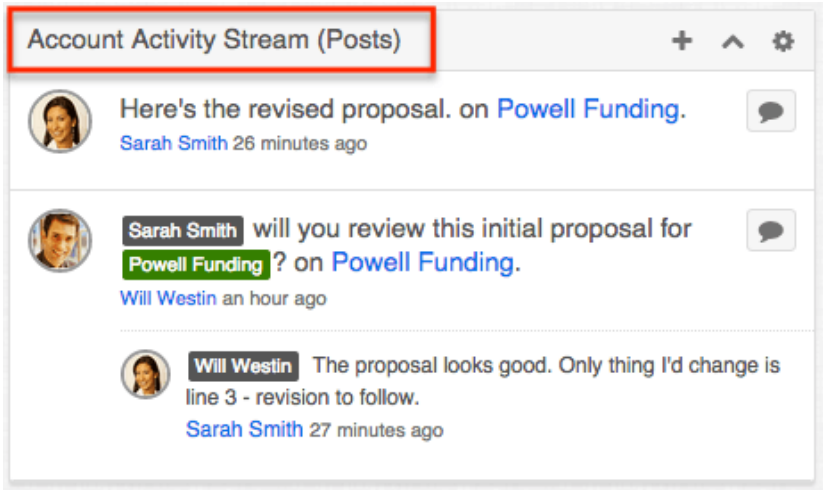

When added to an Intelligence Pane, the My Activity Stream dashlet will display stream items in context to the data within the main container of the page. For example, if you add the dashlet to a dashboard on the main Accounts module page,

the main container of the page contains the Accounts list view. Therefore, the My Activity Stream dashlet will restrict activity stream items to only those activities related to the Accounts module. Similarly, if the dashlet is added to the Opportunity module's Intelligence Pane, the My Activity Stream dashlet will restrict activity stream items to only those activities related to the Opportunities module. If the My Activity Stream dashlet is added to any record view's Intelligence Pane dashboard, the dashlet will restrict activity stream items to only those activities related to the record displayed in the main container on the page.

To filter the My Activity Stream dashlet, edit the dashlet and click once on the Filter button. Choose any of the pre-defined Activity Stream filters, such as "Messages for Post", which will restrict the stream to only items that were posted by users, and then click "Save". For more information on Activity Stream filters, please refer to the Activity Streams documentation.

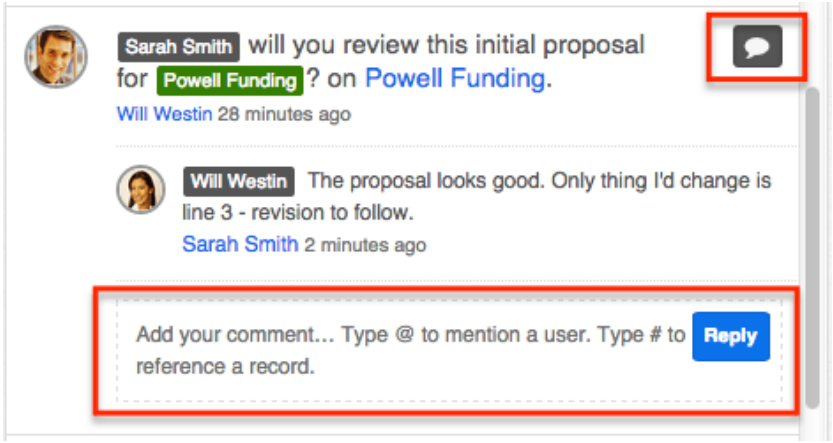



It is good practice to also rename an edited dashlet accordingly so that it is clear that this dashlet is displaying a filtered view. To change the dashlet's title, edit the dashlet, type a new name into the text box that contains the words "My Activity Stream", and then click "Save".




To add a comment or reply to the Activity Stream via the My Activity Stream dashlet, click on the Comment button next to the relevant stream entry, type your

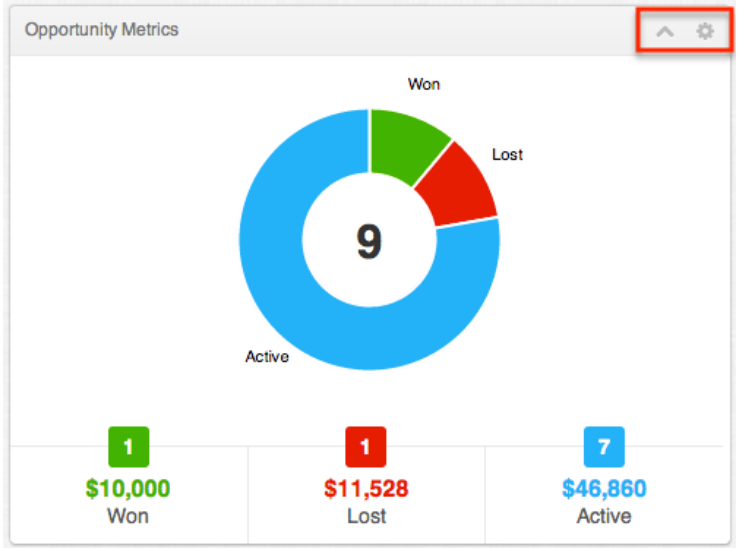
reply, and then press the Reply button. For more information about interacting with Activity Streams, please refer to the Activity Streams documentation.




Opportunity Metrics

The Opportunity Metrics dashlet appears in the intelligence pane of the Accounts record view. It provides information regarding opportunities associated to the account that are won, lost, and active along with the relevant dollar amounts. The donut chart within the dashlet shows the breakdown of the opportunities by status and displays the total count of opportunities associated to the current record you are viewing. The chart is color coded based on the chart key to represent the won, lost, and active opportunity status.

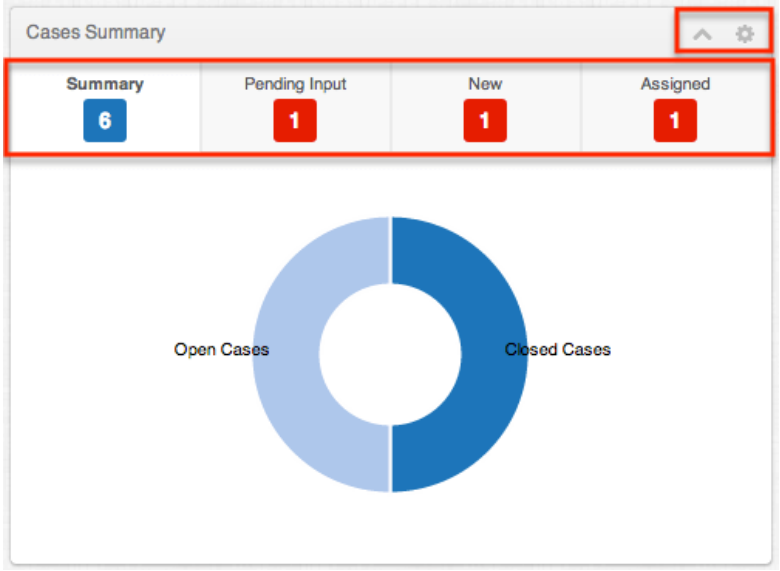
The Gear icon on the upper right of the dashlet allows you to edit, refresh, and remove the dashlet accordingly. To collapse the dashlet, click the Up arrow to the left of the Gear icon. To open up the dashlet, you can simply click the arrow again.




Cases Summary

The Cases Summary dashlet also appears in the intelligence pane of the Accounts record view. It allows users to view status information for cases related to the specific account record. The case summary is broken up into multiple tabs (Summary, Pending Input, New, Assigned) and displays a number on each tab to indicate the relevant count of the open, closed, new, and pending cases. Please note that the record must have at least one related case in order for data to appear within the dashlet and the status tabs (Pending Input, New, Assigned) will appear if there is a related case meeting that particular status.

The Gear icon on the upper right of the dashlet allows you to edit, refresh, and remove the dashlet accordingly. To collapse the dashlet, click the Up arrow to the left of the Gear icon. To open up the dashlet, simply click the arrow again.

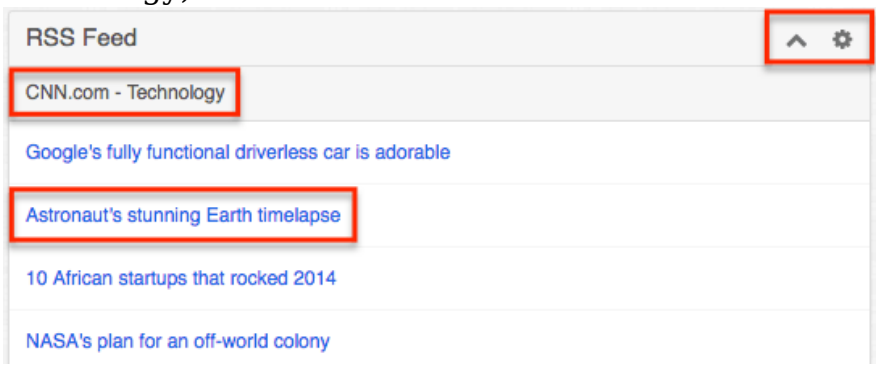



The Summary tab displays a donut chart that shows the breakdown of open cases versus closed cases. If you hover over the breakdown it will display the number of open and closed cases for the record. The Pending Input tab displays a list of all pending cases related to the current record.The New tab displays a list of all new cases associated to the current record. The Assigned tab displays a list of all open cases associated to the current record. Users can easily view the case details by clicking the subject link under each tab. Please note that you can also mark a case as a favorite by clicking the star icon to the left of the case subject under each tab (Pending Input, New, Assigned).




RSS Feed Dashlet

The RSS Feed dashlet allows you to view external RSS or Blog feeds via the dashboard on the intelligence pane. When adding the dashlet, you will need to enter in the desired feed URL (e.g. "http://news.google.com/?output=rss") in the Feed URL field. You can also select a value in the "Number of entries to show" field to display the most recent 5, 10, 15, or 20 entries from the feed and specify an auto-refresh interval (e.g. Every Hour) if desired. Once the dashlet is added to the intelligence pane, the applicable feeds will display and you can click the title of each feed to access the full story on the parent site. If you wish to access the full site where the RSS feeds originate from, simply click the title (e.g. CNN.com - Technology) below the dashlet header.




The Gear icon on the upper right of the dashlet allows you to edit, refresh, and remove the dashlet accordingly. To collapse the dashlet, click the Up arrow to the left of the Gear icon. To open up the dashlet, you can simply click the arrow again.

Saved Reports Chart Dashlet

The Saved Reports Chart dashlet allows you to view pre-defined report charts as well as charts of your saved reports. There are 17 pre-defined report charts that are available to select in the Saved Reports Chart dashlet. These pre-defined charts allow you to view information such as leads by lead source, calls by team by user, opportunities by lead source, etc. You also have the option to add custom report charts as dashlets by selecting the saved report when setting up the dashlet to add to the intelligence pane. Please note that all report types (Summation Report, Matrix Report, Summation with Details Report) except for Rows and Columns-type reports have the chart option available to view as dashlets.

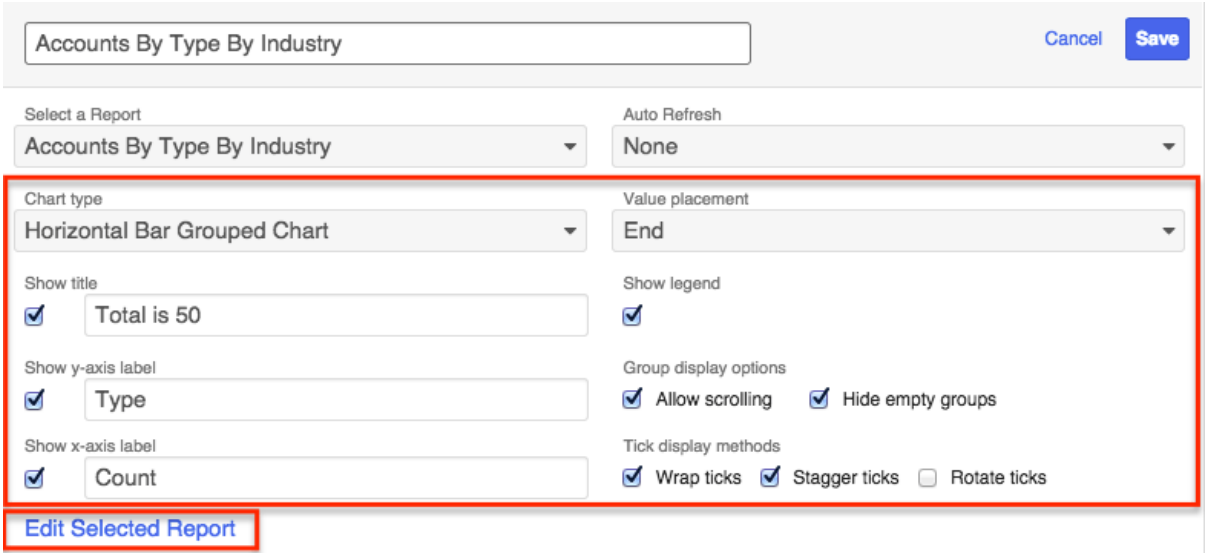
When adding the reports chart dashlet, you can use the various configuration options (e.g. Chart type, Value placement, etc.) available to define how your report chart will display in the dashlet. This allows users to customize each of their chart dashlets based on their viewing preference. Please note that the configuration options available may vary slightly between the report charts.

- Chart type : Select the type of chart (e.g. Vertical Bar Chart, Horizontal Bar

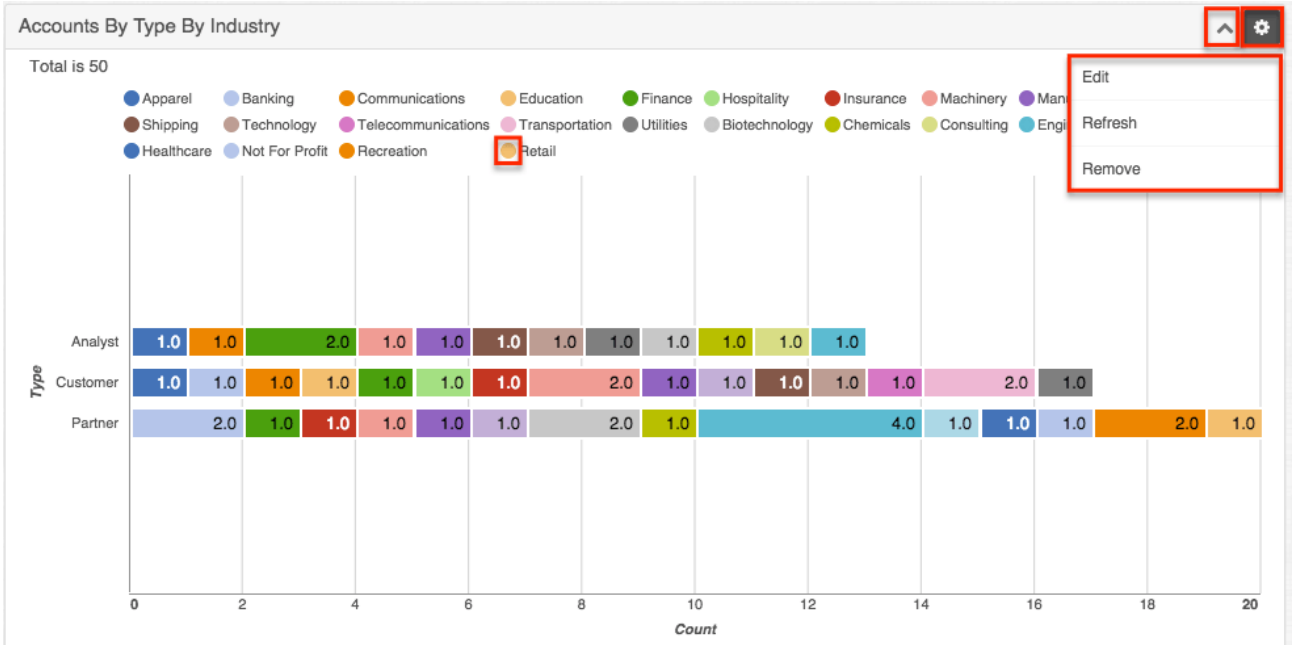
Chart, etc.) you wish to be displayed.
    - When a report chart is selected, the chart type will default to the chart type defined in the originating report.
    - The chart types available to select will vary between reports.
- Value placement : Select where the chart values (e.g. End, Middle, etc.) will be positioned for bar charts.
    - The Top option applies to bar grouped-type charts (e.g. Horizontal Bar Grouped Chart) with an un-stacked data series.
- Show title : Mark the checkbox to have the chart's title appear in the dashlet.
    - A title from the originating report will populate automatically, but you can specify a different title for display in the dashlet by entering a new value in the open text box.
- Show legend : Mark the checkbox to display the full chart's legend on the dashlet.
- Show y-axis label : Mark the checkbox to display the chart's y-axis title on the dashlet.
    - A title from the originating report will populate automatically, but you can specify a different title for display in the dashlet by entering a new value in the open text box.
    - This option only applies to bar charts and line charts.
- Group display options : Enable the appropriate options based on how you wish to view data on the chart.
    - Allow scrolling : Scroll the chart up-and-down or left-to-right on the dashlet, if applicable. Disabling this option re-sizes the chart to fit the full dashlet width.
        - Scrolling will work for charts where the data exceeds the size of the dashlet width.
        - This option only applies to bar charts.
    - Stack data series : Displays a stacked bar for each grouping in the report chart broken into sub-sections of data. Disabling this option displays separate bars for each sub-section in the same grouping.
        - This option only applies to grouped bar charts (e.g. Horizontal Bar Grouped Chart).
    - Hide empty groups : Hides any empty data groups from the chart, if applicable.
        - This option only applies to bar charts.
- Show x-axis label : Mark the checkbox to display the chart's x-axis title on the dashlet.
    - A title from the originating report will populate automatically, but you can specify a different title for display in the dashlet by entering a new value in the open text box.
    - This option only applies to bar charts and line charts.
- Tick display methods : Enable the appropriate options based on how you wish to display x-axis labels with long texts on the chart dashlet. When all three options are enabled, Sugar will apply the display methods in order ("Wrap ticks", "Stagger ticks", "Rotate ticks") and display the x-axis labels based on

the best option.

- Wrap ticks : Wraps x-axis labels to the next line.
- Stagger ticks : Staggers x-axis labels in alternating positions.
- Rotate ticks : Rotates x-axis labels diagonally instead of across.
- This option only applies to bar charts and line charts.




Once the dashlet is added, you can make changes as necessary by clicking the Gear icon on the upper right, which allows you to edit, refresh, and remove the dashlet accordingly. To collapse the dashlet, simply click the Up arrow to the left of the Gear icon.



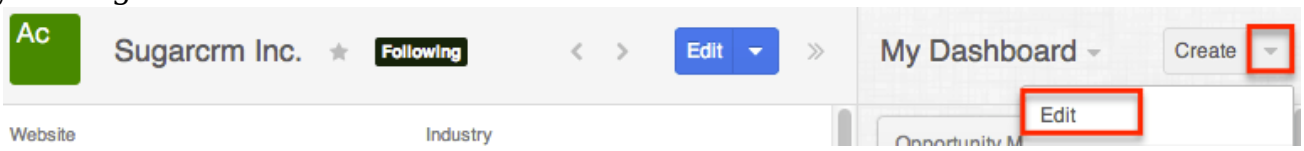

Please note that you can hide certain groups of data on the chart you do not wish to view by toggling the legend keys (e.g. Apparel, Retail, etc.). The legend also wraps responsively on the chart dashlet when re-sizing the browser window. If more than three rows are required to display the full legend on the chart, the

"Show legend" link will display on the chart dashlet. Simply click the link on the dashlet to view the full legend via a dropdown.

In addition, you can edit the specific report you are currently viewing in the dashlet via the Reports module. Simply click the Gear icon on the upper right of the dashlet, select "Edit", then choose the Edit Selected Report link below the configuration options. A pop-up message will appear confirming if you wish to be directed to the Reports module. Click "Confirm" to proceed and the report wizard will open for the specific report (e.g. Accounts By Type By Industry). Please make the necessary changes to the report and save accordingly. For more information on editing reports, please refer to the Reports documentation. The reports chart dashlet on your Home page will reflect the changes made to the report accordingly.

## D&B Dashlets

The D&B dashlets (e.g. D&B: Company Information, D&B: Contact Information, etc.) are available in the Accounts module and allows users to view relevant information for companies as well as import key data into Sugar. Please note that administrators must first configure the D&B connector via Admin > Connectors before users can utilize the dashlets to view and import data into Sugar. For more information on how to configure the D&B connector, please refer to the Connectors section in the System documentation. Users can add the D&B dashlets to an account record's intelligence pane by clicking the triangle next to the Create button on the upper right of the dashboard and editing the dashboard. Please note that the dashlets will be collapsed by default when added to the intelligence pane. For more information on adding dashlets, please refer to the Adding Dashlets section of this documentation. Please note that the D&B dashlets available to add to the dashboard depend on the license agreement (Basic, Standard, Premium) your organization has with D&B.




The following D&B dashlets are available to add depending on your organization's license agreement with D&B:

| Dashlet | Description |
| --- | --- |
| D&B: Company Information | View key information related to the company.<br><br>Note: The level of detail provided on the company is dependent on the license agreement (Basic, Standard, Premium) |

| | |
|---|---|
| | your company has with D&B.<br><br>The DUNS number must be present in the account's record view in order for the information to be pulled from D&B and displayed in the dashlet. |
| D&B: Competitors | View and import information on associated competitors for the company.<br><br>Note: The DUNS number must be present in the account's record view in order for the information to be pulled from D&B and displayed in the dashlet. |
| D&B: Contact Information | View, search, and import contacts related to the company.<br><br>Note: The DUNS number must be present in the account's record view in order for the information to be pulled from D&B and displayed in the dashlet. |
| D&B: Import and Enrich | Perform a search by location or company name via the D&B database. Select the company from the list of matching results then import into Sugar. |
| D&B: Industry Information | View information specific to the industry in which the company belongs.<br><br>Note: The SIC Code must be present in the account's record view in order for the information to be pulled from D&B and displayed in the dashlet. |
| D&B: Family Tree | View and import information regarding member organizations (if applicable) of the company.<br><br>Note: The DUNS number must be present in the account's record view in order for the information to be pulled from D&B and displayed in the dashlet. |
| D&B: Financial Information | View key financial information (e.g. Annual Income Statements, etc.) related to the company. |

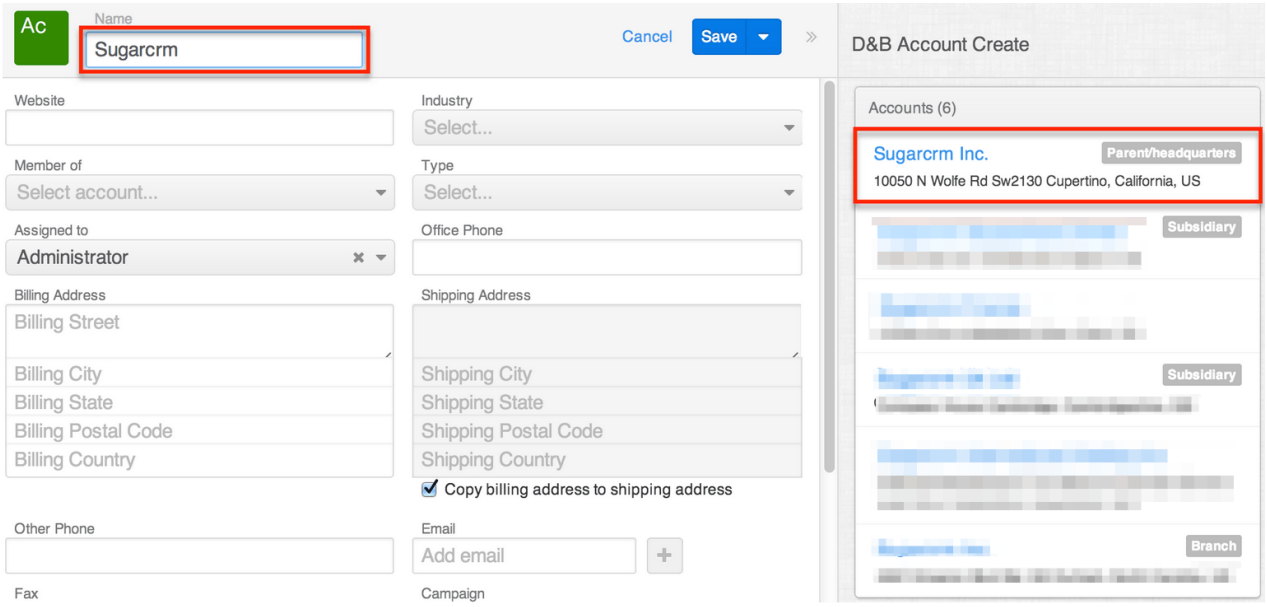
| | |
|---|---|
| | Note: The DUNS number must be present in the account's record view in order for the information to be pulled from D&B and displayed in the dashlet. |
| D&B: News Feed | View latest news feed relevant to the company as well as access associated social media accounts (e.g. Twitter, Facebook, etc.).<br><br>Note: The DUNS number must be present in the account's record view in order for the information to be pulled from D&B and displayed in the dashlet. |

D&B Account Create Dashboard

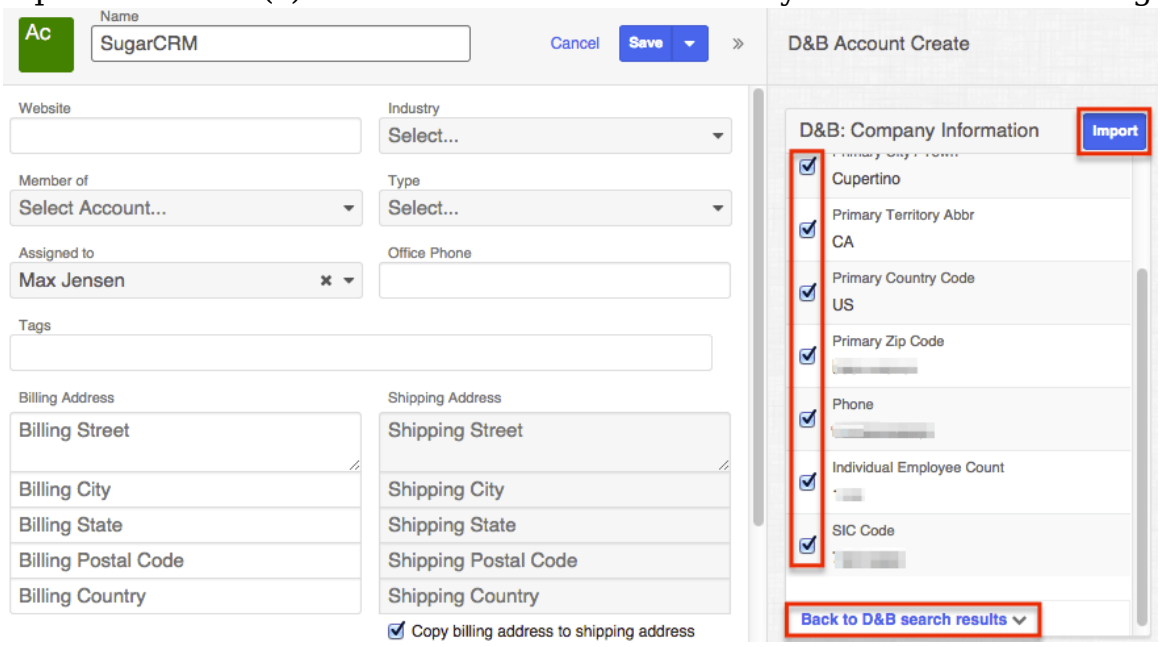
When a new account is created in Sugar, the D&B Account Create dashboard appears in the intelligence pane to the right of the record view. The dashlets (D&B: Company Search, D&B: Search Results, etc.) in this dashboard change as it progresses from searching for the company, to viewing the results, and importing the company details. As you enter in the name of the account in the Name field, a search will be performed within the D&B: Company Search dashlet to pull up any matching companies in the D&B database. You can use the wildcard character (% or *) at the beginning or end of your text when entering in the account name to broaden the search if you wish. Please note that the search results are based on matching company names as well as the trade style names associated to the company in the D&B database. So even though some of the companies on the results list do not seem like a match, it will be included if an associated trade style name matches the search term. Please note that the first ten matching companies will display in the D&B Account Create dashlet, and you can click "Show More D&B Search Results" at the bottom of the dashlet to display the other companies. The company's headquarters, subsidiary companies, and branches will be identified accordingly within the dashlet. Please note that any companies detected as a duplicate of an existing Sugar account, will be marked as "Duplicate" in red to the right of the company's name in the search result. The duplicate check is based on the DUNS number, which is a unique company ID populated in the account's record view when data is imported from D&B. In addition, if an existing account does not have a DUNS number but has a matching name, a duplicate check is performed in Sugar upon saving the new account to pull up any matching accounts.

Select the appropriate company in the search results list and the company's key

information (e.g. name, phone, address, etc.) will display in the D&B: Company Information dashlet. To return back to the previous search results, simply click "Back To D&B Search Results" at the bottom of the D&B: Company Information dashlet.




Each line of company information in the dashlet is marked automatically for import into Sugar. Simply click the Import button on the upper right of the dashlet to import the data into the new account record. Please note that if the company is detected as a duplicate of an existing Sugar account, the duplicate record(s) will appear within the record view and you can click "Ignore Duplicate and Save" if you wish to proceed with creating the record. Please note that you can preview the duplicate record(s) as well as edit the record as you wish before saving.




If you do not wish to import certain company data, be sure to un-check the specific

line of company information before proceeding with the import. Once the import is completed successfully the data will appear in the corresponding Sugar fields in the record view to the left of the intelligence pane. Please note that the DUNS number associated to the company in D&B will be populated automatically in the DUNS field of the Accounts record view. The DUNS number is a unique identifier in D&B and is used to pull associated information (e.g. contacts, competitors, etc.) specific to the company from the D&B database.

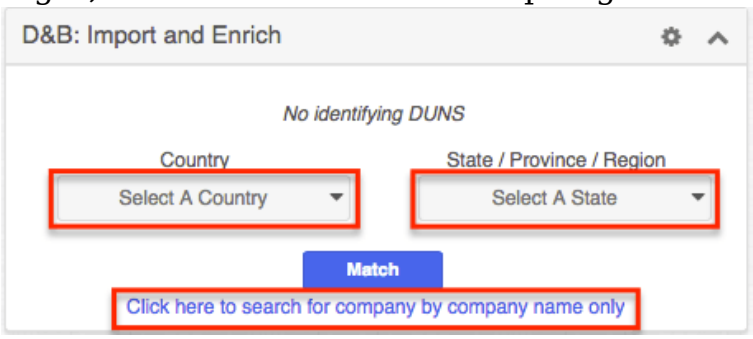
D&B: Import and Enrich Dashlet

The D&B: Import and Enrich dashlet can be added to the Account record view's intelligence pane and allows you to search for companies within the D&B database based on the company's name or location (Country and State/Province/Region). Please note that you can use the wildcard character (*) when entering in the account name to broaden the search if you wish. For example, you can use the wildcard at the beginning of your text such as "*energy" to pull up any companies that have the word "energy" in the name, regardless of how it starts or ends. All three D&B license types (Basic, Standard, Premium ) include the D&B: Import and Enrich dashlet. This dashlet can be used to search, view, and import key company information (e.g. address, phone, etc.). To perform a search by company name only, simply click the link below the Match button. Once the search is performed, the list of matching companies will display, and you can click "Show More D&B Search Results" at the bottom of the dashlet to load the next set of results. Please note that you can define the number of results that display in the dashlet per load by clicking the Gear icon on the upper right, selecting "Edit", then changing the Page Size value. The "Back to Import & Enrich" link will also display at the bottom of the dashlet and you can click this link if you wish to perform a different search.

You can perform a search based on location by selecting the country and state on the D&B: Import and Enrich dashlet and clicking "Match". Please note that performing a search based on location will display confidence levels (Low Confidence, Medium Confidence, High Confidence) to the right of each company's name in the results list. The confidence level indicates how close of a match the company in the results list is based on the company's name, city, zip code stored in the database compared to the company name entered and location (country and state) you selected on the search form. The list of matching companies will display, and you can click "Show More D&B Search Results" at the bottom of the dashlet to load the next set of results. The "Back to Import & Enrich" link will also display at the bottom of the dashlet and you can click this link if you wish to perform a different search. Click the specific company from the results list to view the company's information. To return back to the previous search results, simply click "Back to D&B search results" at the bottom of the dashlet. When the information is imported into Sugar, the DUNS field in the Accounts record view is populated as well with a nine-digit numeric value from D&B. The DUNS number is unique to each company in D&B and is used to identify and pull relevant data specific to the

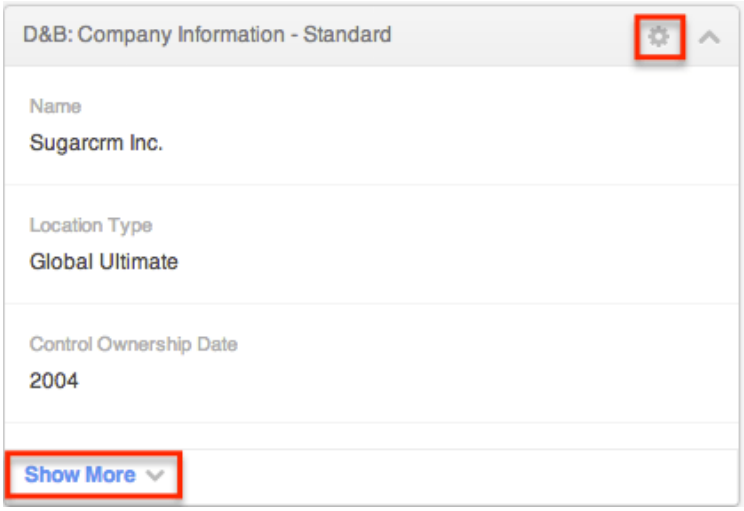
company via the D&B database.

For accounts that already have the DUNS number, the D&B: Import and Enrich dashlet will perform a refresh check each time you open the account's record view to see if there is any updated company information in the D&B database. If the information in the account's record view is up to date based on the information D&B has, then the dashlet will display "Up to Date" on the upper right of the dashlet. Fields that are up to date will be marked as "Duplicate" in yellow to the right of the dashlet row. If the data pulled from D&B is newer than what is in Sugar, there will be a Date Stamp in green to the right of the field in the dashlet.



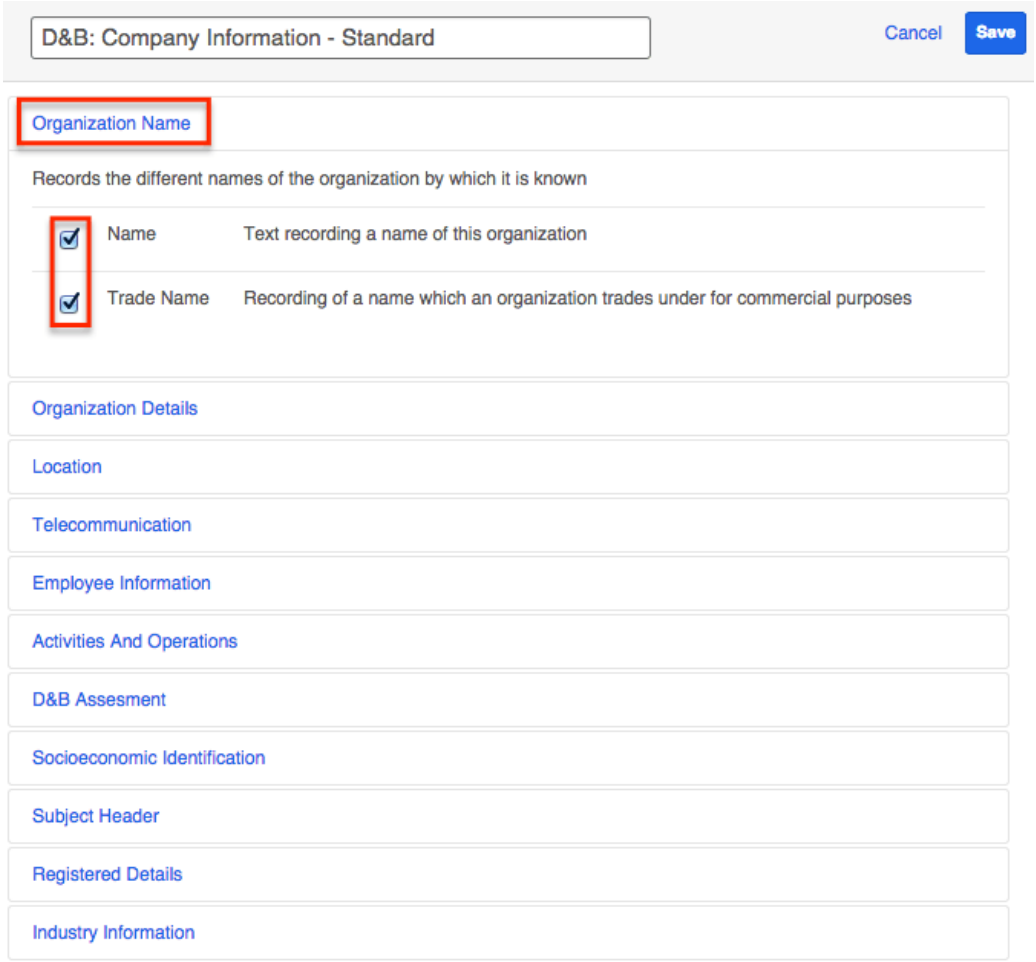

D&B: Company Information Dashlet

The D&B: Company Information dashlet displays additional information pertaining to the company such as organization start year, line of business, etc. The DUNS number in the account's record view is necessary to pull the company information from D&B. Please note that the level of information provided depends on the type of license agreement (Basic, Standard, Premium) your organization has with D&B. You can expand the dashlet by clicking the Show More link on the bottom left of the dashlet to view more information. The information in this dashlet cannot be imported into Sugar as it is a read-only dashet.




Please note that if multiple industry codes are displayed in the dashlet, the company's primary code will be marked as "Primary" in green to the right of the

dashlet row. You can also click the Gear icon on the upper right then select "Edit" to configure the type of information (e.g. Organization Details, Location, etc.) you want displayed in the dashlet across all accounts. Simply click the specific category (e.g. Organization Name) available for the dashlet to open up and view the associated data elements (e.g. Name, Trade Name). You can choose to hide any of the data elements you do not wish to view in the D&B: Company Information dashlet by un-checking the specific item(s) in the configuration options page. Marking the checkbox again will display the information in the dashlet. Click "Save" to preserve the changes made to the dashlet. Please note that the data elements available to view in the D&B: Company Information dashlet varies between the D&B license types. Also, there may be instances where a particular data element (e.g. Organization Identification Number) does not exist in D&B for some companies, so it will not display in the dashlet regardless of whether the specific data element is marked to display.



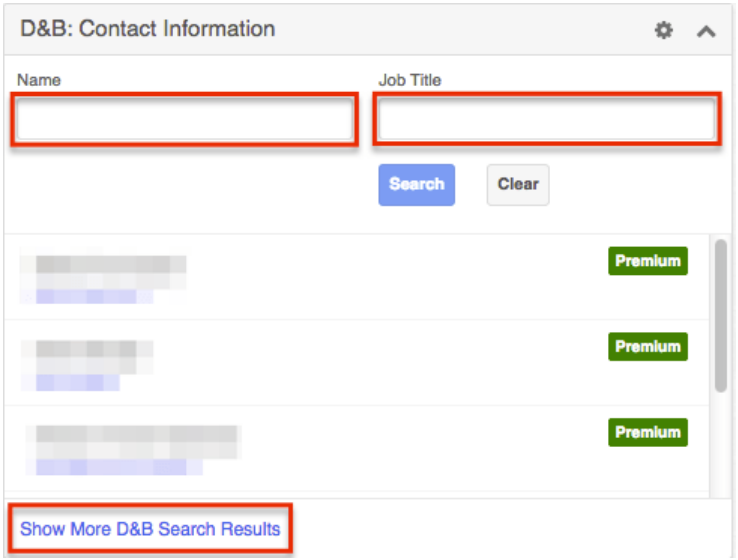

D&B: Contact Information Dashlet

The D&B: Contact Information dashlet is available for all three D&B license types (Basic, Standard, Premium) and displays contacts related to the specific company pulled from the D&B database. Please note that the account must have a DUNS

number in order for the associated contacts to pull from D&B. The dashlet will display a search form as well as a list of related contacts once the DUNS number is recognized for the account. Contacts in the dashlet that display "Premium" to the right of the name indicates that an email address and/or phone number exists for the contact in D&B. Please note that only the Premium D&B license type provide email address and phone number information for contacts.

Click "Show More D&B Search Results" at the bottom of the dashlet to load the next set of results. Please note that you can define the number of results that display in the dashlet per load by clicking the Gear icon on the upper right, selecting "Edit", then changing the Page Size value. You can select a contact from the list of results or perform a search using the contacts name (first or last or both) or job title. As you enter in the keyword, the results will start displaying similar names (e.g. entering Richard will include Rick in the results) matching the keyword. Please note that if you enter in a value for both the Name and Job Title field, both criteria's must be true for a record in order for it to appear in the dashlet search result. To clear the filter(s) and pull up all search results, simply click the Clear button to the right of the Search button.

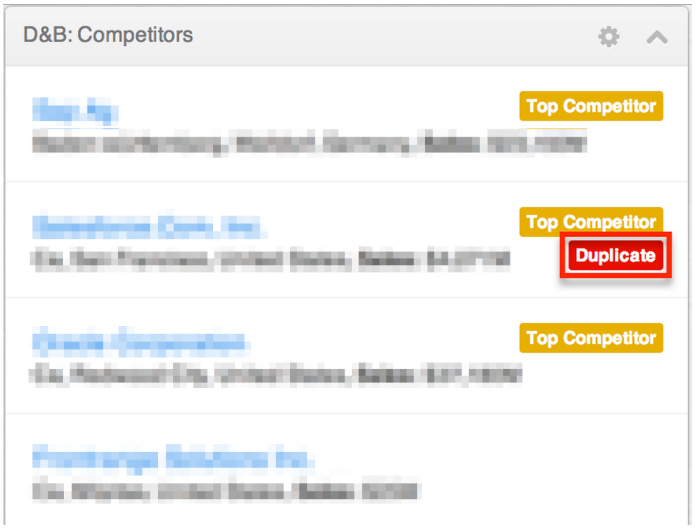
The dashlet will display the contact's profile information (e.g. name, job title, etc.) along with their job and compensation history (if available). For premium contacts, the full email address and phone number will not display properly (e.g. AGxxxx@example.com) in the dashlet, but will render the full information on the record view when importing the contact to Sugar. Please note that premium contact information is only available for the Premium license type. To import the contact, simply click "Import" on the upper right of the dashlet to create the record in Sugar. The newly created contact record will have the D&B Principal ID field populated automatically in the record view upon import. The D&B Principal ID is used to identify the contact and detect duplicate records, so any record(s) in the dashlet detected as a duplicate of an existing record in Sugar will display "Duplicate" to the right of the contact's name. Sugar will also display any duplicate record(s) detected based on the D&B Principal ID when attempting to save the contact. Please note that the imported contact record will automatically be related to the account in Sugar and display in the Contacts subpanel.




D&B: Competitors Dashlet

The D&B: Competitors dashlet is available for the Premium D&B license type and provides a list of the company's industry competitors. For more information on adding dashlets to dashboards, please refer to the Adding Dashlets section of this documentation. The companies top three competitor's per D&B's analysis are labeled as "Top Competitor" in yellow to the right of the company's name in the dashlet row. Please note that any companies detected as a duplicate of an existing Sugar account, will be marked as "Duplicate" in red to the right of the company's name in the search result. The duplicate check is based on the DUNS number, which is a unique company ID populated in the account's record view when data is imported from D&B. In addition, if an existing account does not have a DUNS number but has a matching name, a duplicate check is performed in Sugar based on the name when saving the new account.

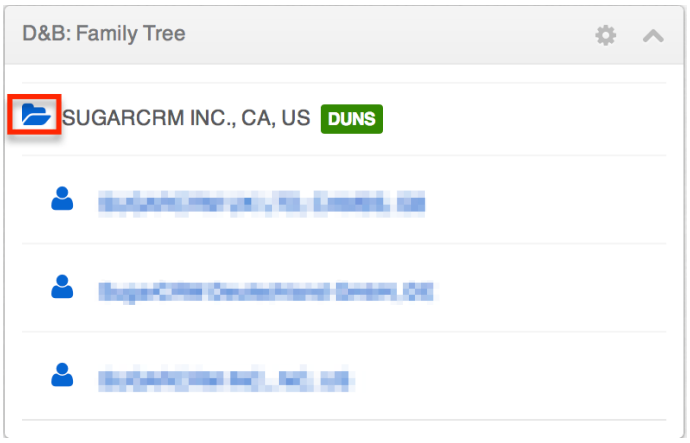
Select the appropriate competitor company in the search results list and the company's key information (e.g. name, phone, address, etc.) will display in the D&B: Competitors dashlet. To return back to the previous search results, simply click "Back To D&B Competitors List" at the bottom of the dashlet. To import the competitor company into Sugar, simply click the Import button on the upper right of the dashlet to create the new account record. Please note that if the company is detected as a duplicate of an existing Sugar account, the duplicate record(s) will appear within the record view upon save and you can click "Ignore Duplicate and Save" if you wish to proceed with creating the record. You can also preview the duplicate record(s) and edit the record as you wish before saving.




D&B: Family Tree Dashlet

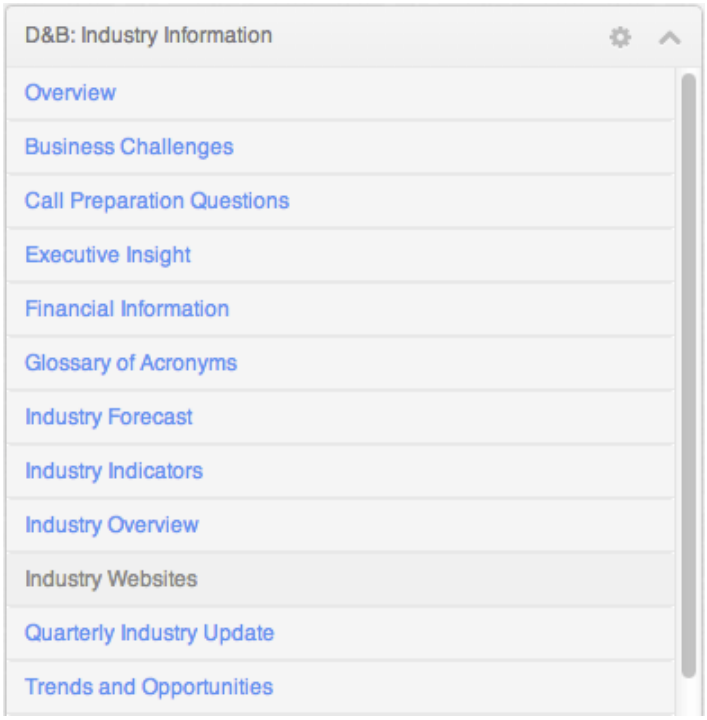
The D&B: Family Tree dashlet is available for the Standard and Premium D&B license type and displays information regarding member organizations (e.g. headquarters, subsidiary, branch, etc.) associated to the company. For more information on adding dashlets to dashboards, please refer to the Adding Dashlets

Please note that any companies detected as a duplicate of an existing Sugar account, will be marked as "Duplicate" in red to the right of the company's name. The duplicate check is based on the DUNS number, which is a unique company ID populated in the account's record view when data is imported from D&B. In addition, if an existing account does not have a DUNS number but has a matching name, a duplicate check is performed in Sugar based on the name when saving the new account. Select the appropriate company you wish to view and the company's key information (e.g. name, phone, address, etc.) will display in the D&B: Family Tree dashlet. To return back to the previous view, simply click "Back To D&B Family Tree" at the bottom of the dashlet. To import the company into Sugar, simply click the Import button on the upper right of the dashlet to create the new account record. Please note that the company may be detected as a duplicate of an existing Sugar account if the name matches that of an organization (e.g. SugarCRM Inc.) in the family tree that has already been imported. The duplicate record(s) (if any) will appear within the record view, but you can click "Ignore Duplicate and Save" if you wish to proceed with creating the record. Please note that you can preview the duplicate record(s) as well as edit the record as you wish before saving.



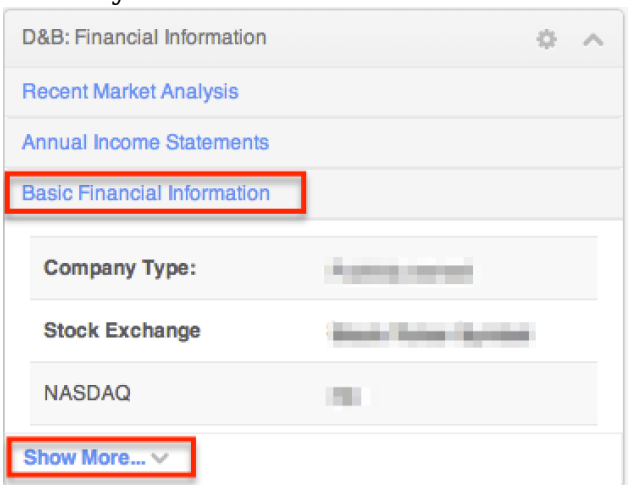

D&B: Industry Information Dashlet

The D&B: Industry Information dashlet is available for the Standard and Premium D&B license types and provides information such as the company's industry overview, business challenges, executive insight, etc. In addition, the industry information (e.g. Business Challenges, Call Preparation Questions, etc.) provided in the dashlet varies between the Standard and Premium license agreement. Please note that the SIC code must be present in the account's record view in order for D&B to pull the associated industry information. The SIC Code field is automatically populated in the account's record view when the company information is imported from D&B. The industry Overview section will be displayed in the dashlet by default and provide users with general information regarding the industry in which the company belongs. To view other industry-specific information, simply scroll down the dashlet and click the links (e.g. Business Challenges, Industry Forecast, etc.) that you wish to view. Please note that you can only view one section of the industry information at a time within the dashlet.



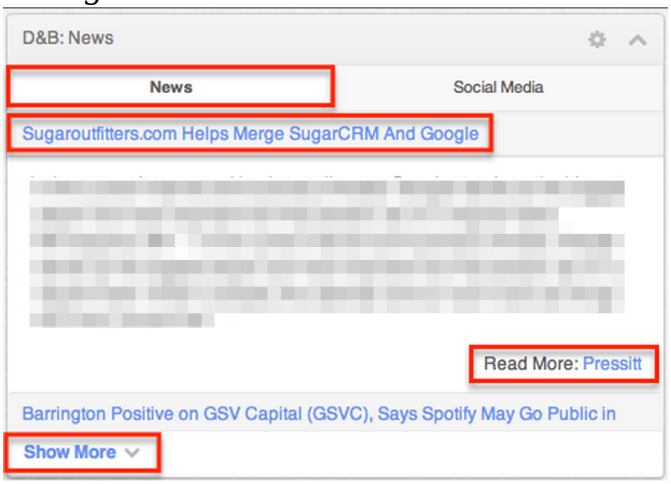

D&B: Financial Information Dashlet

The D&B: Financial Information dashlet is available for the Premium D&B license type and displays key financial information (if publicly available) related to the company such as recent market analysis, annual income statements, etc. The Recent Market Analysis information displays by default when the dashlet is added, and you can click "Show More" on the bottom of the dashlet to expand the dashlet then scroll to view additional information. To view the company's other financial information, simply click the appropriate link (e.g. Basic Financial Information) within the dashlet to display the information you wish to view. Please note that you can only view one section of the financial information at a time within the dashlet.

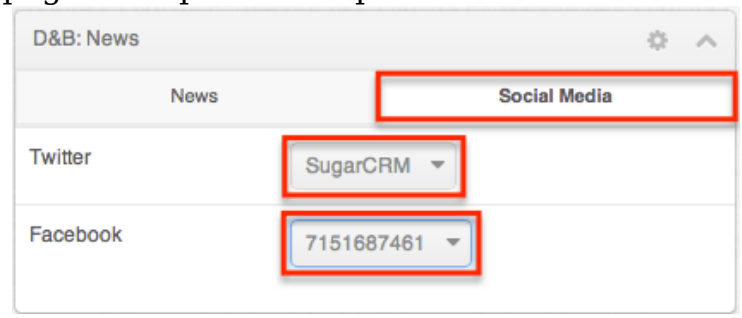



D&B: News Dashlet

The D&B: News dashlet is available for the Premium D&B license type and provides the latest news feed relevant to the company where the company's name is referenced within the article. Click the appropriate link within the dashlet to get a quick preview of the article, and you can click the news link below the preview to read the full article from the originating site in a separate tab. You can click "Show More" on the bottom left of the dashlet to increase the dashlet height and scroll through more news articles.




The Social Media tab appears within the D&B: News dashlet and allows users to access the company's related social media data from various sources such as Facebook, Twitter, Wikipedia, and YouTube. Click the Social Media tab and you can select the associated social media accounts (e.g. Twitter) you wish to view information for by clicking the associated dropdown menu. Please note that the social media options (Twitter, Facebook, YouTube, Wikipedia) that appear in the dashlet will vary depending on whether D&B has the information for the company in their system. When you click the dropdown menu (e.g. Twitter), the list of associated accounts will display and you can also perform a search within the results list. Once you select the specific social media account you wish to view, the page will open in a separate tab.




Twitter Dashlet

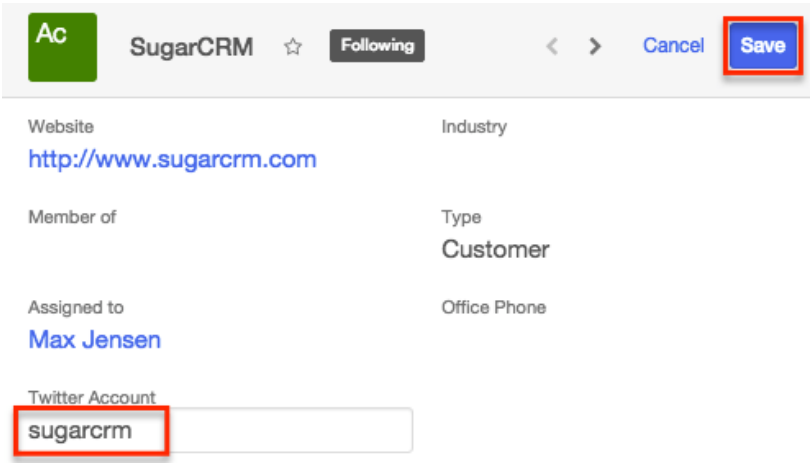
The Twitter dashlet allows users to view and access various feeds for specific twitter accounts via the record view's and list view's intelligence pane. In addition, users can also view and access twitter feeds via Sugar's Activity Streams as well as

the Twitter dashlet on Sugar's Home page. Please note that administrators must first configure the Twitter connector before users can view twitter feeds via the Twitter dashlet. For more information on how to enable and configure the Twitter connector, please refer to the Connectors section of the System documentation in the Administration Guide.

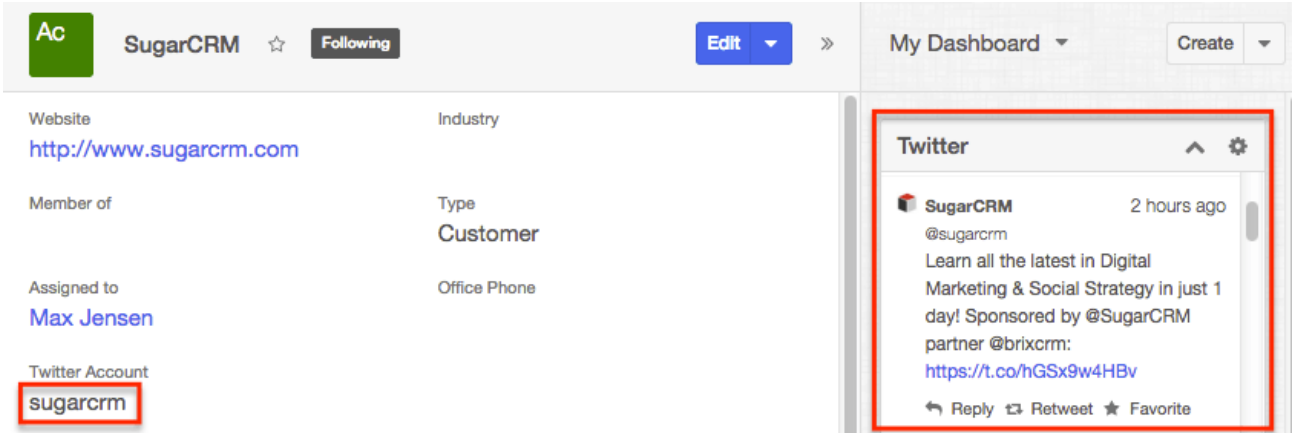
You can easily add the Twitter dashlet by editing the dashboard on your intelligence pane. For more information on adding dashlets, please refer to the Adding Dashlets section of this documentation. When adding or configuring the dashlet in the record view, please do not enter a Twitter ID as this will cause the Twitter dashlet for all other records in the module to display the same Twitter ID feed. In order to display specific twitter feeds for each record, you must enter a Twitter ID in the Twitter Account field on the Record View layout.

The following steps cover adding the Twitter ID to view feeds via the Account record view's intelligence pane as an example:

1. Navigate to an account record view's intelligence pane and verify that the Twitter dashlet is there.
    - Note: If the Twitter dashlet is not displayed in the intelligence pane, you can add the dashlet by editing the dashboard. For more information on adding dashlets, please refer to Adding Dashlets section of this documentation.
2. View the record's details and locate the Twitter Account field. Click the Pencil icon to the left of the Twitter Account field and enter in a Twitter ID (e.g. sugarcrm). Click "Save" to preserve the change.
    - Note: If the Twitter Account field is not available on the record view, administrators must add the field via Admin > Studio. For more information on adding fields to layouts, please refer to the Studio documentation in the Administration Guide.




Once the Twitter ID is saved on the record view, navigate to the Twitter dashlet in the intelligence pane to view the associated twitter feeds for the account.

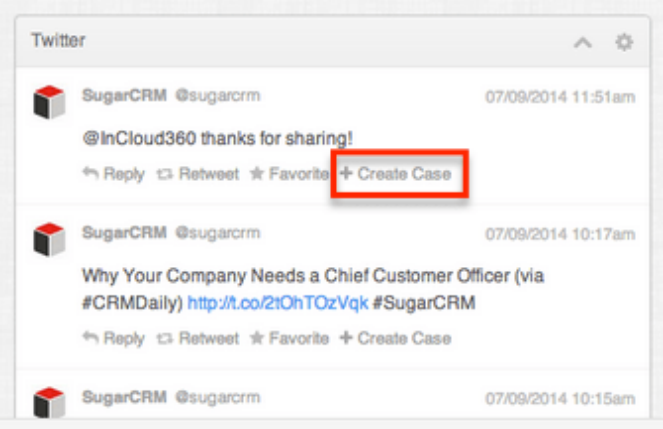



Please note that if the Twitter ID is not entered in the Twitter Account field, then the Twitter connector will try to pull feeds by finding a match based on the record's name (e.g. account name, contact name, etc.). Also, if there is a custom field mapped to Twitter, the Twitter Account field will still be verified first to see if there is a valid Twitter ID and the Twitter dashlet will pull feeds using this account. If the Twitter Account field is blank, then it will check the custom field that is mapped and pull feeds based on the Twitter ID entered. If both fields are blank, then it will check the record's name to try and find a matching account to pull twitter feeds. For more information on mapping connector fields, please refer to the System documentation in the Administration Guide.

Note: Twitter dashlets on the Home page and module's list view need to have a valid Twitter ID associated in order to display the feeds. Simply click the Gear icon on the upper right of the dashlet, select "Edit", and enter the appropriate Twitter ID. Save the change and the corresponding twitter feeds will display in the dashlet.

Tweet to Case

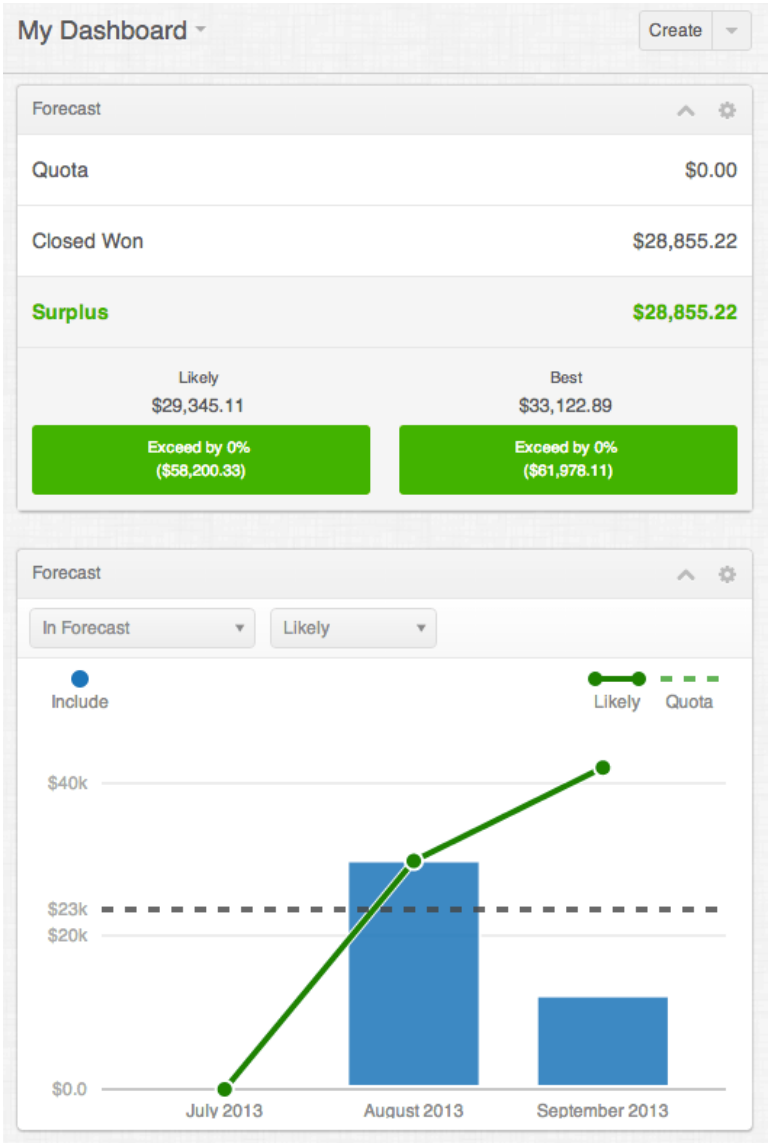
The Tweet to Case feature allows users to create cases directly from incoming tweets within the Twitter dashlet. When this feature is enabled, users can create a case by clicking "+ Create Case" within an incoming tweet. For more information on using this feature, please refer to the Creating Via Twitter Dashlet section of the Cases documentation.




Module-Specific Dashlets

Certain modules (e.g. Forecasts) in Sugar contain dashlets that are built specific to that module. For the Forecasts module, both the list view and record view intelligence pane display dashlets that allow users to view key information regarding the various forecast stages, likely amounts, best amounts, etc. For more information regarding these forecast-specific dashlets, please refer to the Forecasts documentation.

The Gear icon also appears on the upper right of these dashlets to allow users to edit, refresh, and remove the dashlet's accordingly. To collapse the dashlet, click the Up arrow to the left of the Gear icon and to open up the dashlet, simply click the arrow again.




## Adding Dashlets

Additional dashlets can be added by clicking the triangle next to the Create button then selecting "Edit". You can add dashlets in any of the open Add a Row boxes which appear in the dashboard's edit layout. For each dashboard row, you will have the option to select multiple columns (one or two) based on the number of dashlets you wish to add within the row. For example, if you select "+ 2 columns", then two open Add a Dashlet boxes will appear within the row for you to select and add dashlets. Please note that the dashlets available to add may vary between the modules. Once selected, the dashlet will be added to the specified column within the dashboard row.

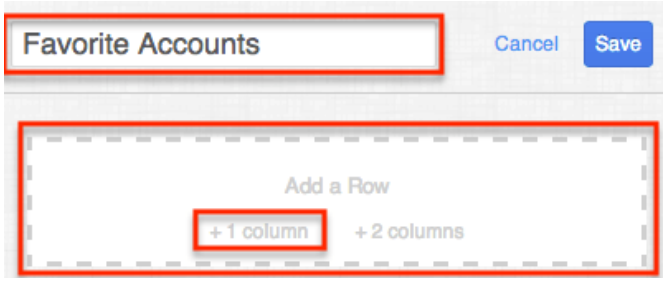
Please note that you can add the same dashlet multiple times in the dashboard with different configurations to show different records or information.

Adding Dashlets to New Dashboard

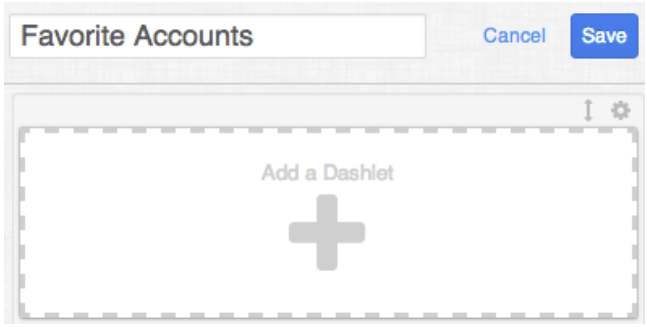
Users have the option to create new dashboards if they wish to group new set of dashlets together. When creating a new dashboard, users can easily add new dashlets by adding a row along with the specified number of columns (one or two) they wish to have within the row. For more information on creating new dashboards, please refer to the Creating Dashboards section of this documentation.

The following steps cover adding the List View dashlet (e.g. My Accounts) under a new dashboard (e.g. Favorite Accounts) as an example:

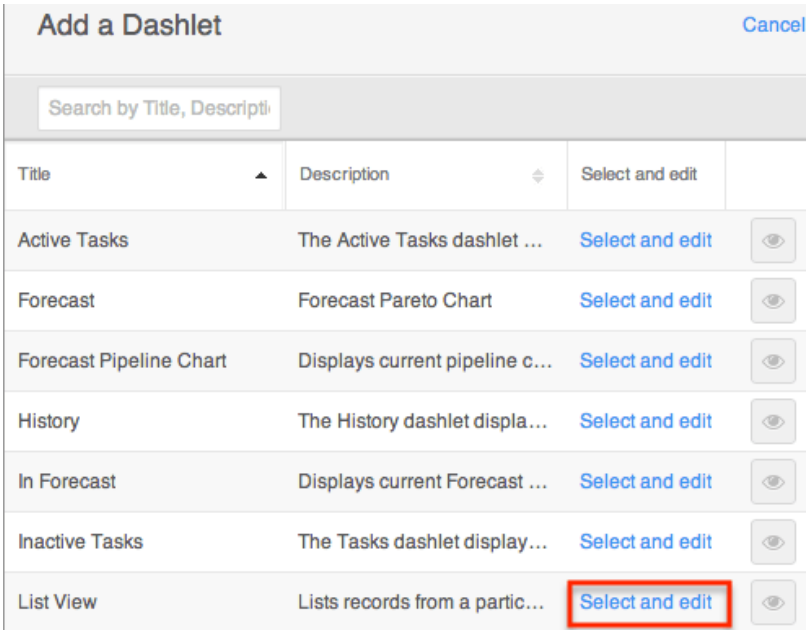
1. Follow Steps 1-2 of the Creating Dashboards section of this documentation.
2. Click "+ 1 column" in the Add a Row box.
    - You can click "+2 columns" if you wish to add two dashlets within the row.



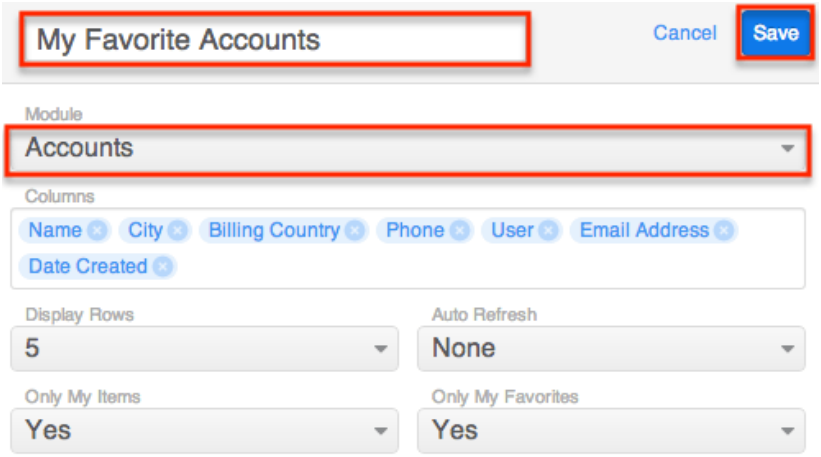

3. Click the Add a Dashlet box that appears to select and add the List View dashlet.



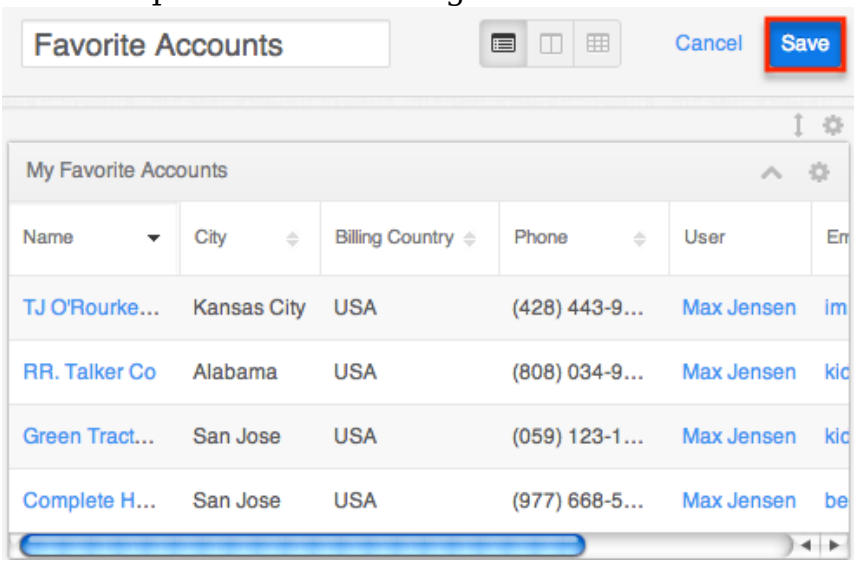

4. Click the Select and edit link corresponding to the List View dashlet in the Add a Dashlet page.




5. Select "Accounts" in the Module dropdown list and make any necessary changes (e.g. dashlet title) using the available filter options then click "Save".




6. The dashlet will now appear in your new Favorite Accounts dashboard. Click "Save" to preserve the change.

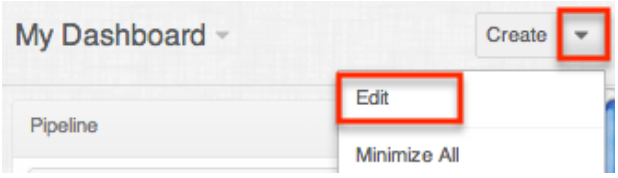


Adding Dashlets to Existing Dashboard

Occasionally users may need to add more dashlets to their current dashboards if they wish to view additional information regarding their records, sales, etc.

The following steps cover adding the Top 10 Sales Revenue Line Items dashlet under the "My Dashboard" on the Opportunities list view intelligence pane as an example:

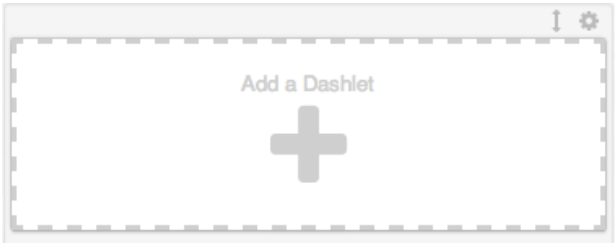
1. Navigate to the Opportunities list view's intelligence pane.
    - If multiple dashboards exist within the intelligence pane, select the specific dashboard to view. For more information on viewing other dashboards, please refer to the Switching Between Dashboards section of this documentation.
2. Click the triangle next to the Create button on the upper right of the dashboard, then select "Edit".



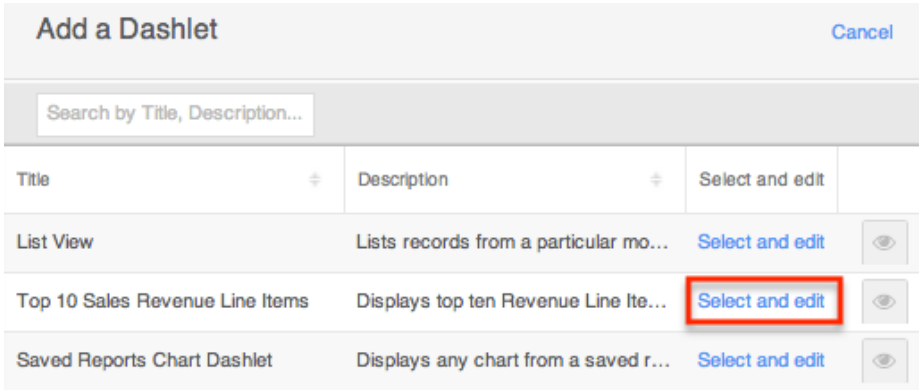

3. Scroll to an open Add a Row box and select "+ 1 column".



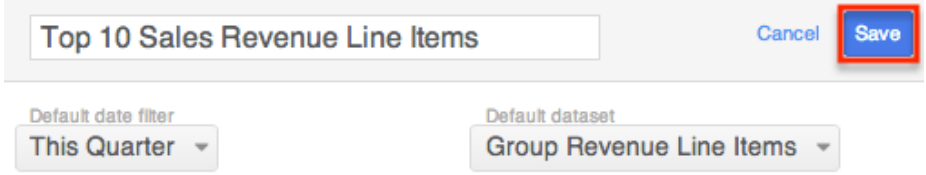

4. Click the Add a Dashlet box to select and add the Top 10 Sales Revenue Line Items dashlet.



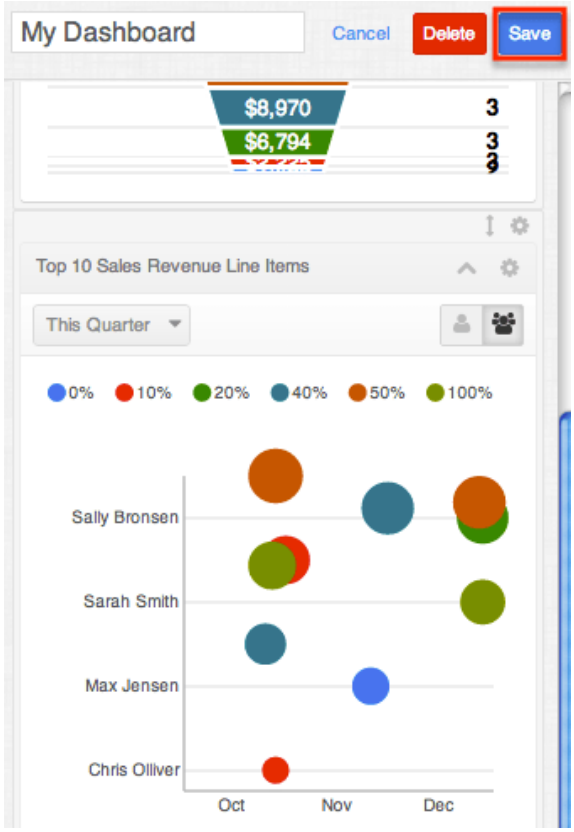

5. Click the Select and edit link corresponding to the Top 10 Sales Revenue Line Items dashlet in the Add a Dashlet page.




6. Make any necessary changes using the available edit options then click "Save".




7. The Top 10 Sales Revenue Line Items dashlet will now appear in your "My Dashboard". Click "Save" to preserve your changes.



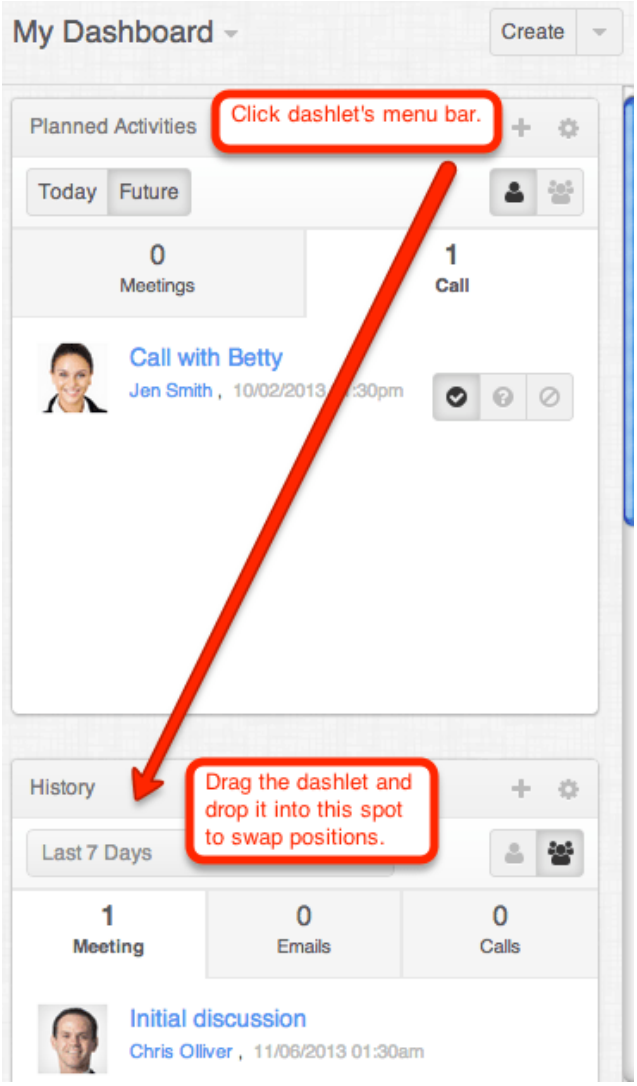

## Rearranging Dashlets

Users have the option to rearrange dashlets to place them in different positions on the dashboard per their viewing preference. You can easily swap positions between

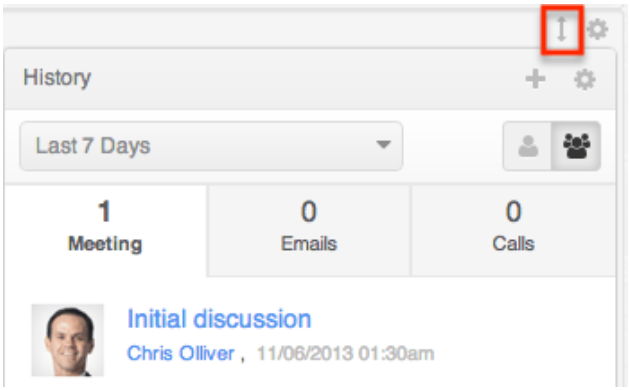
two dashlets by dragging and dropping the dashlets within the dashboard.

The following steps cover moving the Planned Activities dashlet underneath the History dashlet in the Contact records intelligence pane as an example:

1. Navigate to a Contact record's intelligence pane.
    - If multiple dashboards exist within the intelligence pane, select the specific dashboard where you wish to rearrange the dashlets. For more information on viewing other dashboards, please refer to the Switching Between Dashboards section of this documentation.
2. Click the Planned Activities dashlet's menu bar.
3. Drag and drop the dashlet underneath the History dashlet.



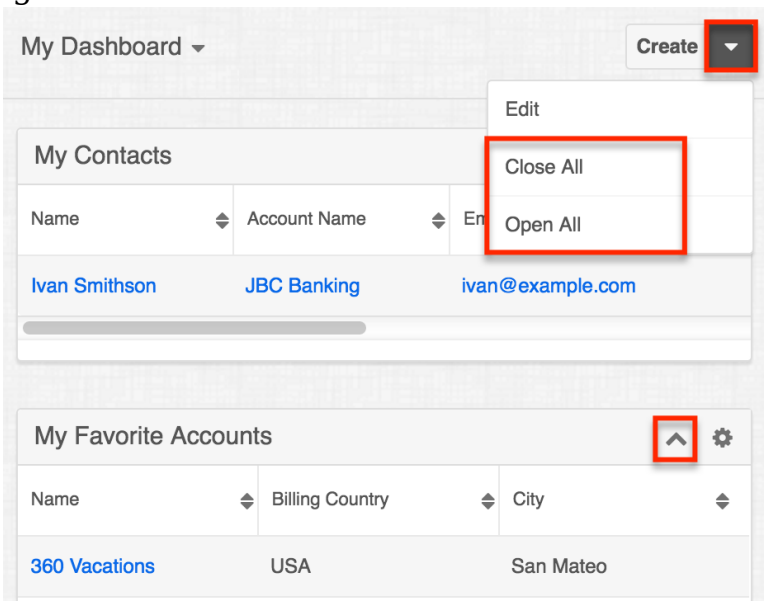

You can also edit the dashboard to rearrange the dashlets in different locations. Please note that each dashboard row displays an Up and Down arrow icon on the upper right above the dashlet menu bar. Users can click the icon then drag the entire row up and down within the dashboard.




## Editing Dashlets

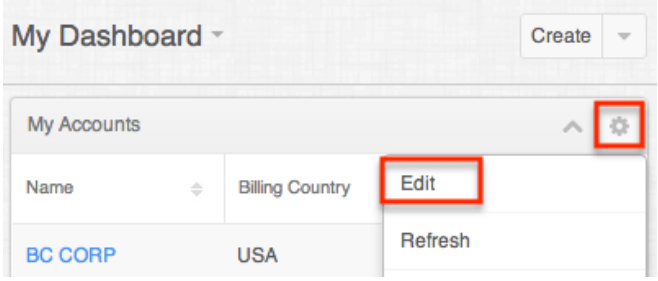
Dashlets can easily be configured to display specific information users want to view. Simply click the Gear icon at the top of the dashlet menu bar then select "Edit", which will display the Configuration Options page to configure the dashlet. Make the necessary changes using the available edit options then click "Save" to preserve the change.

Users can also collapse individual dashlets on the dashboard by clicking the Up arrow on the upper right of the dashlet. Please note that Sugar will remember the state of your intelligence pane the next time you return to the module. To collapse all dashlets on the dashboard, simply click the triangle next to the Create button on the upper right of the dashboard and select "Close All". Selecting the Open All option in the Actions menu will open up all collapsed dashlets on the dashboard again.




## Configuration Options

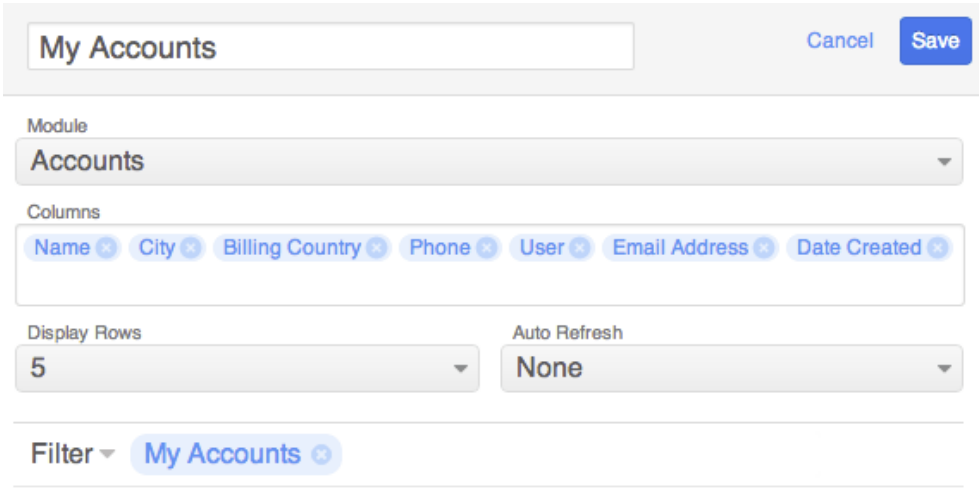
Users can access the Configuration Options page to make changes to the dashlet by clicking the Gear icon at the top of the dashlet menu bar then selecting "Edit". The Configuration Options page will display the various options (e.g. Display Rows, Columns, etc.) available to make the changes. Please note that the options available to configure the dashlets will vary between each dashlet.




The following are the most common options available when filtering and configuring the list view dashlet:

- Title : Change the displayed name of the dashlet.
- Module : Change the module which the dashlet is displaying records from by selecting a different module from the list.
- Columns : Choose the field columns you wish to display on the dashlet. To remove a field column, simply click the "x" to the right of the field name.
    - Note: The field columns available to add to the dashlet are based on the specified fields in the List View layout in Studio. Any changes made to the List View layout in Studio will be reflected in the Columns field. For more information on configuring the List View layout, please refer to the

- Display Rows : Specify how many rows or results this dashlet will display at once. Please note that the maximum is twenty rows.
- Auto Refresh : Choose a time frame to have the dashlet query automatically refresh.
- Filter : Click the Filter option to select a pre-defined filter or create a new filter to be applied to the List View dashlet.
    - Note: The My filter (e.g. My Accounts) is selected by default.

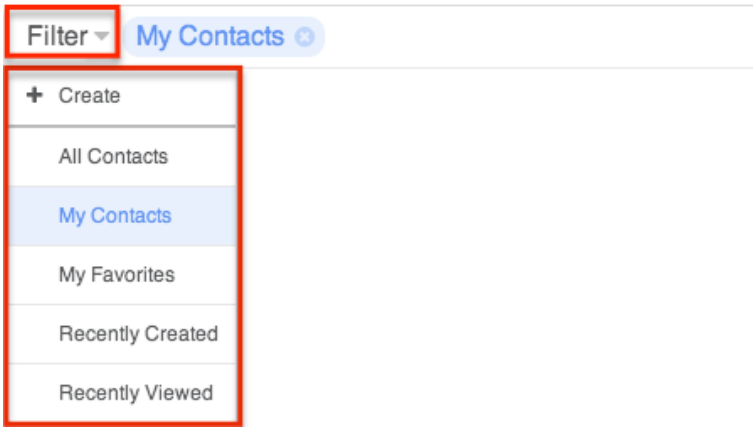



Creating a Filter

The Filters section of the Configuration Options page allow you to filter your dashlet based on pre-defined filters (e.g. My Favorites, Recently Created, etc.) as well as create custom filters. For example, if you select "My Contacts" in the Filter options, the List View dashlet will only display contact records that are assigned to you. To see all records to which you have access, simply select the All option in the filter.

The following Filter options are available to filter the List View dashlet:

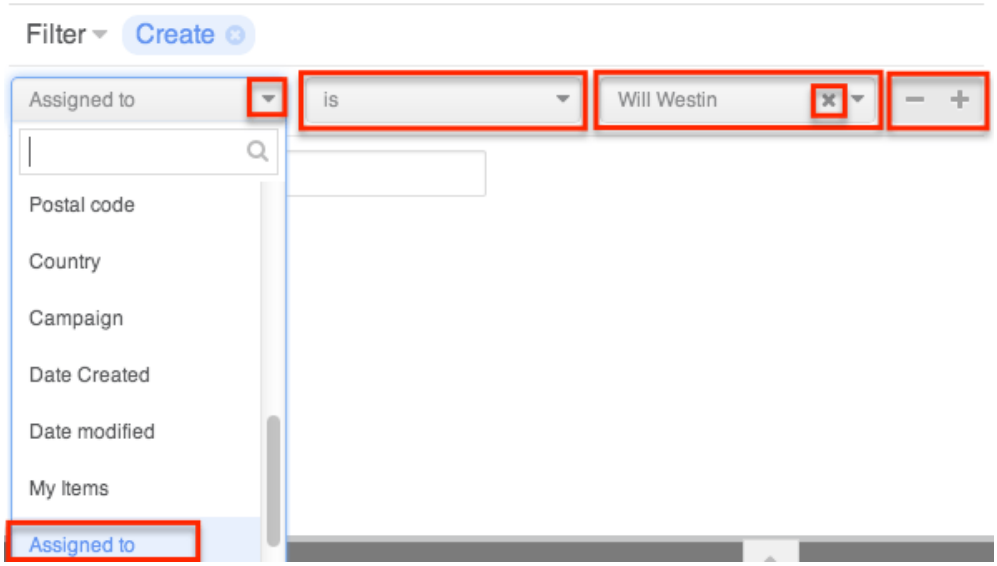
- Create : Create a new custom filter which you can use to filter the List View dashlet
- All "Module" : Select this filter to display all records in the module to which you have access
- My "Module" : Select this filter to only display records assigned to you
- My Favorites : Select this filter to only display records you have marked as favorites
- Recently Created : Select this filter to only display records you created in the module within the last 7 days
- Recently Viewed : Select this filter to only display records you have viewed in the module within the last 7 day



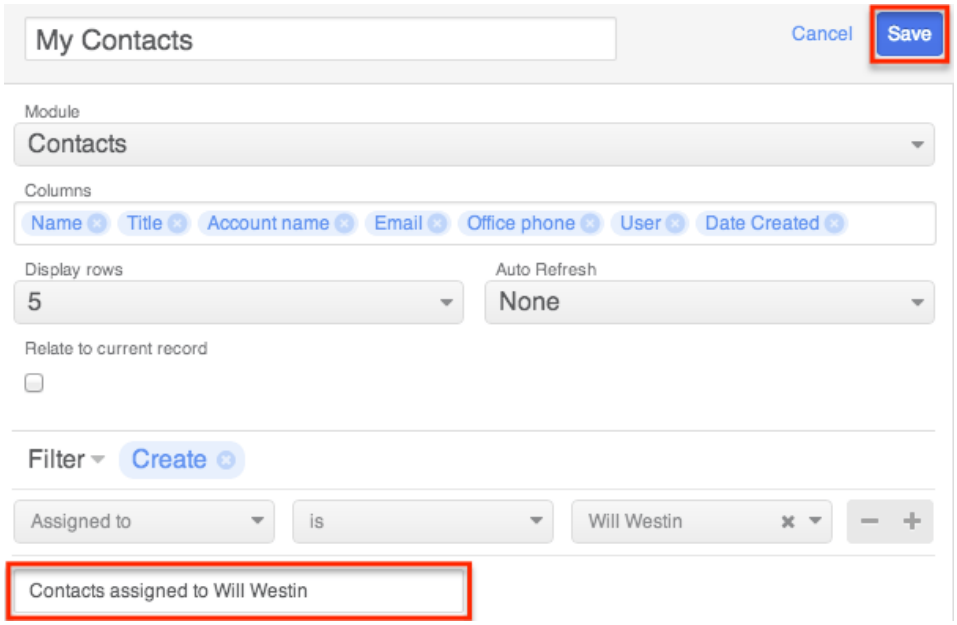

Users can also create new filters via the Create option in the Filter list. This allows users to add custom, complex filter options when filtering the List View dashlet. You have the option to add multiple fields to your new filter by clicking the Plus button to the right of the filter selection dropdown lists. Please note that each one of the filter's criteria need to be true for a record in order for it to appear in the List View dashlet. The fields available to filter the dashlet are based on specified fields in the Search layout in Studio. Any changes made to the Search layout in Studio will be reflected in the filter's field dropdown list. For more information on configuring the Search layout, please refer to the Studio documentation in the Administration Guide.

The following steps cover creating a new filter for contacts assigned to Will Westin as an example:

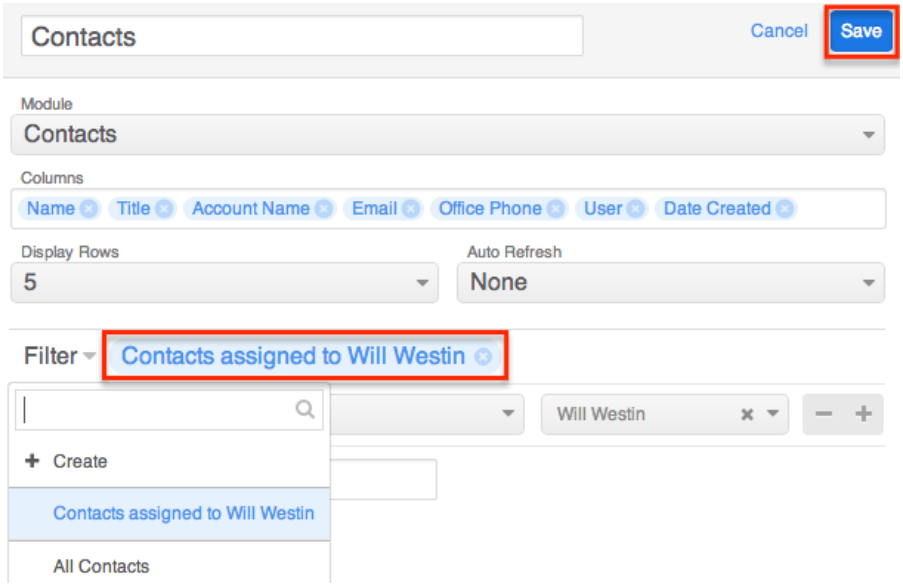
1. Click the Filter option on the Configuration Options page then select "Create".
2. Select the field (e.g. Assigned to) you wish to add to your filter as well as the condition (e.g. is) and matching criteria (e.g. Will Westin).
    - Note: Only fields you have view access for will be available to add in the Filter list.
3. To add additional fields to the new filter, click the Plus button to the right of the filter.
    - To remove fields from the new filter, click the Minus button to the right of the filter.
    - To clear any filter values (e.g. Will Westin), simply click the "x" to the right of the value.




4. Enter in a name for the new filter (e.g. "Contacts assigned to Will Westin").
5. Click "Save" to add this filter to the dashlet list view's Filter options.



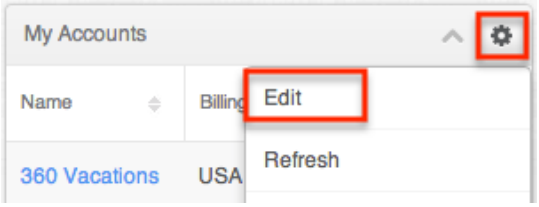

The custom filter will automatically be applied to the dashlet upon save and all records meeting the filter criteria will display. Please note that you can edit the custom filters at any time by selecting the filter (e.g. Contacts assigned to Will Westin) from the Configuration Options page, then clicking the name that appears to the right of the Filter option. Simply make the necessary changes to the custom filter then click "Save" to preserve and apply the changes to the dashlet.



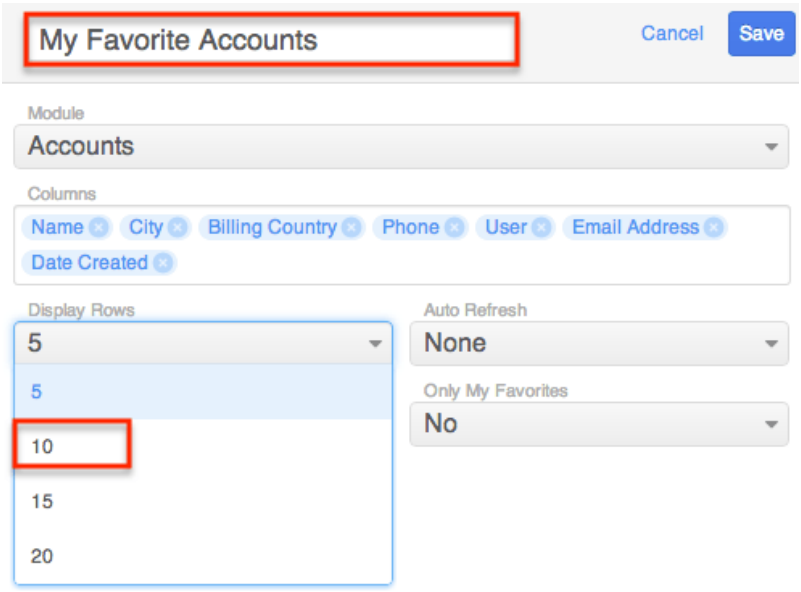

Steps to Edit a Dashlet

Every user can configure their dashlet(s) to only display information they wish to view via the display options and filters available in the Configuration Options page.

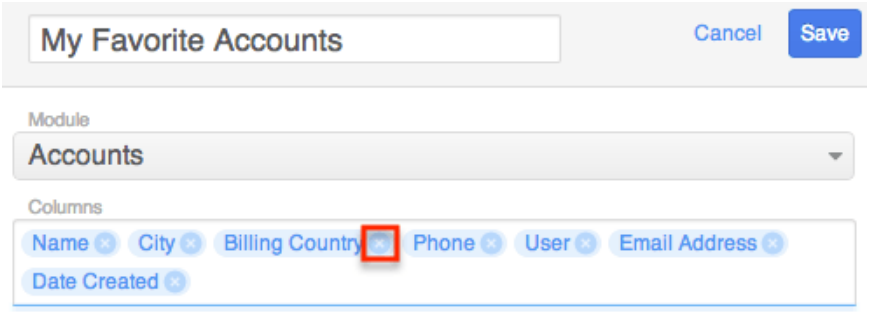
The following steps cover updating the title, display rows, columns, and only my favorites filter for the My Accounts dashlet as an example:

1. Click the Gear icon at the top of the My Accounts dashlet menu bar then select "Edit".


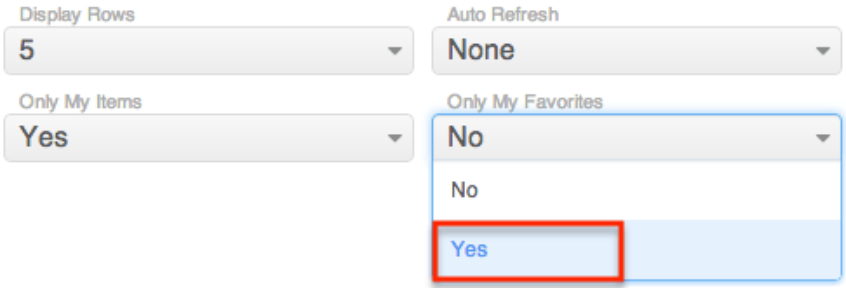
2. Change the "Title" (e.g. My Favorite Accounts) and the display rows from 5 to 10.



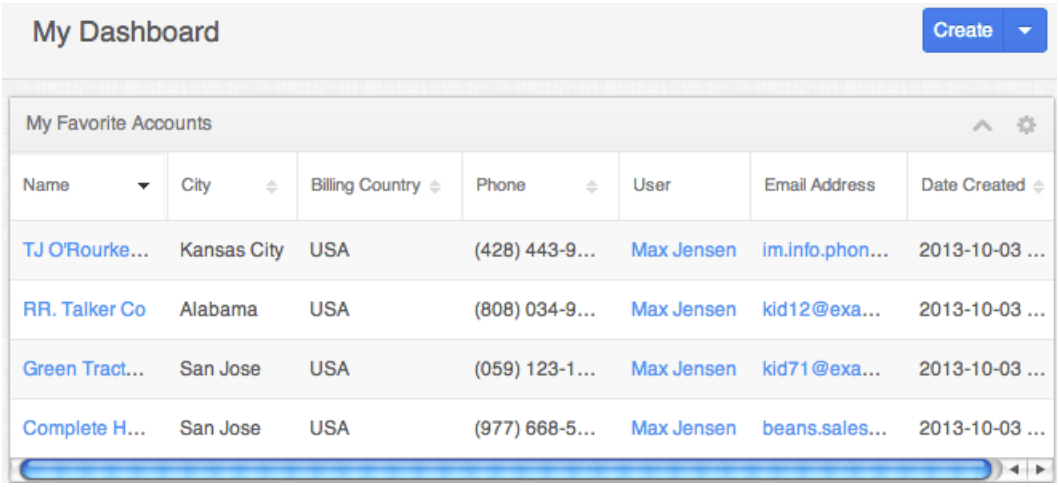

3. Click the "x" next to "Billing Country" to remove the field from the display column.
    - To add columns, simply click your mouse in the Columns field then select from the list of available fields that appear below the dropdown list.




4. Select "Yes" in the Only My Favorites dropdown list.




5. Once the update is complete, click "Save" and the dashlet will reflect the changes made.
    - Click "Save" on the dashboards edit layout to apply the changes to your final dashlet view.

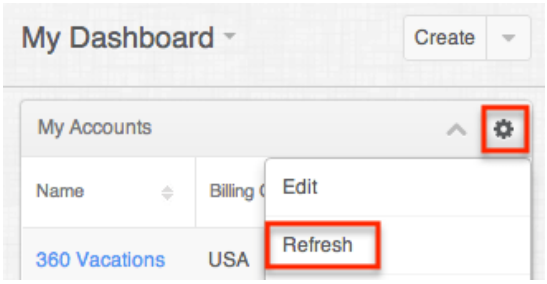



Please note that a horizontal scroll bar may appear on the bottom of the dashlet if numerous fields are displayed in the dashlet. You can scroll left-to-right to view all field values for records that meet the dashlets filter criteria.

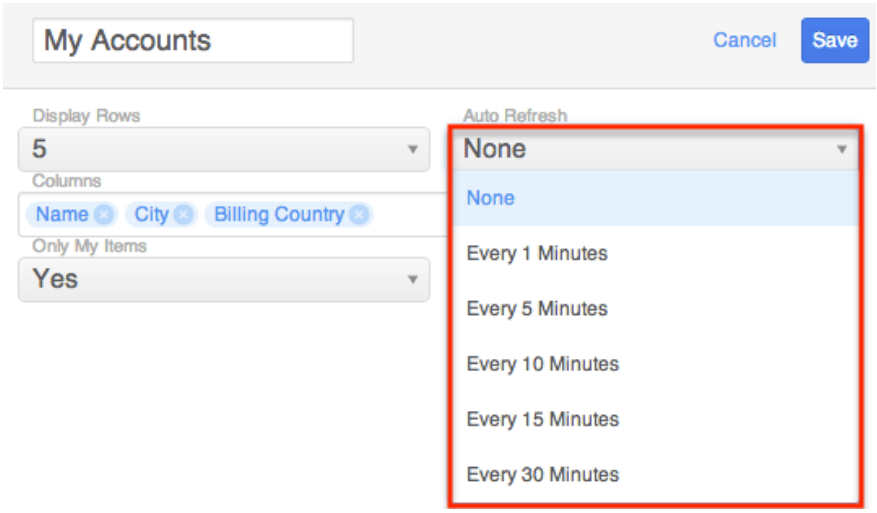
## Refreshing Dashlets

Dashlets in Sugar need to be refreshed in order for users to view any updated data. There are various ways to refresh dashlets on the dashboard and they are as follows:

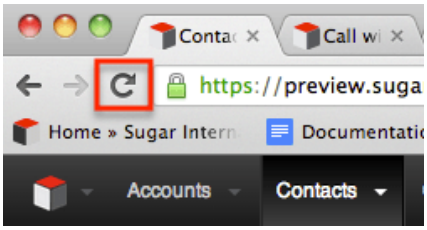
Users can manually refresh the dashlet by clicking the Gear icon at the top of the dashlet menu bar then selecting "Refresh". Please note that this method allows you to refresh one dashlet at a time.




Users can schedule the dashlet to automatically refresh using the Auto-Refresh option. Click the Gear icon at the top of the dashlet menu bar then select "Edit". This will display the Configuration Options page where you can select the interval in the Auto-Refresh dropdown list to schedule the refresh. Please note that you can schedule each of the dashlets to refresh at different intervals.




Users can refresh the entire dashboard(s) by clicking the Reload button at the top of the web browser bar. This method will be beneficial if you would like to refresh all of the dashlets at once.

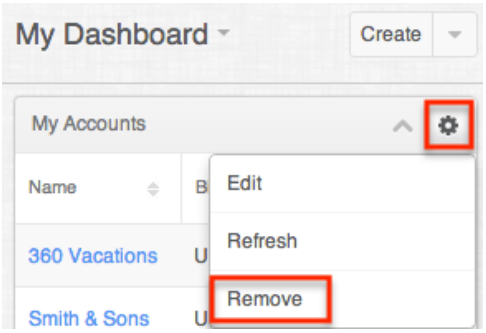



## Deleting Dashlets

Users can delete dashlets they no longer wish to view on their dashboard by clicking the Gear icon at the top of the dashlet menu bar then selecting "Remove". Please note that deleted dashlets are not permanently removed and can be addedback by editing the dashboard. For information on adding dashlets to your dashboard, please refer to the Adding Dashlets section of this documentation.

The following steps cover deleting the My Accounts dashlet from the "My Dashboard" on the list view intelligence pane as an example:

1. Navigate to the Accounts list view's intelligence pane.
    - If multiple dashboards exist within the intelligence pane, select the specific dashboard to view. For more information on viewing other dashboards, please refer to the Switching Between Dashboards section of this documentation.
2. Click the Gear icon at the top of the My Accounts dashlet menu bar then select "Remove".




# Previews

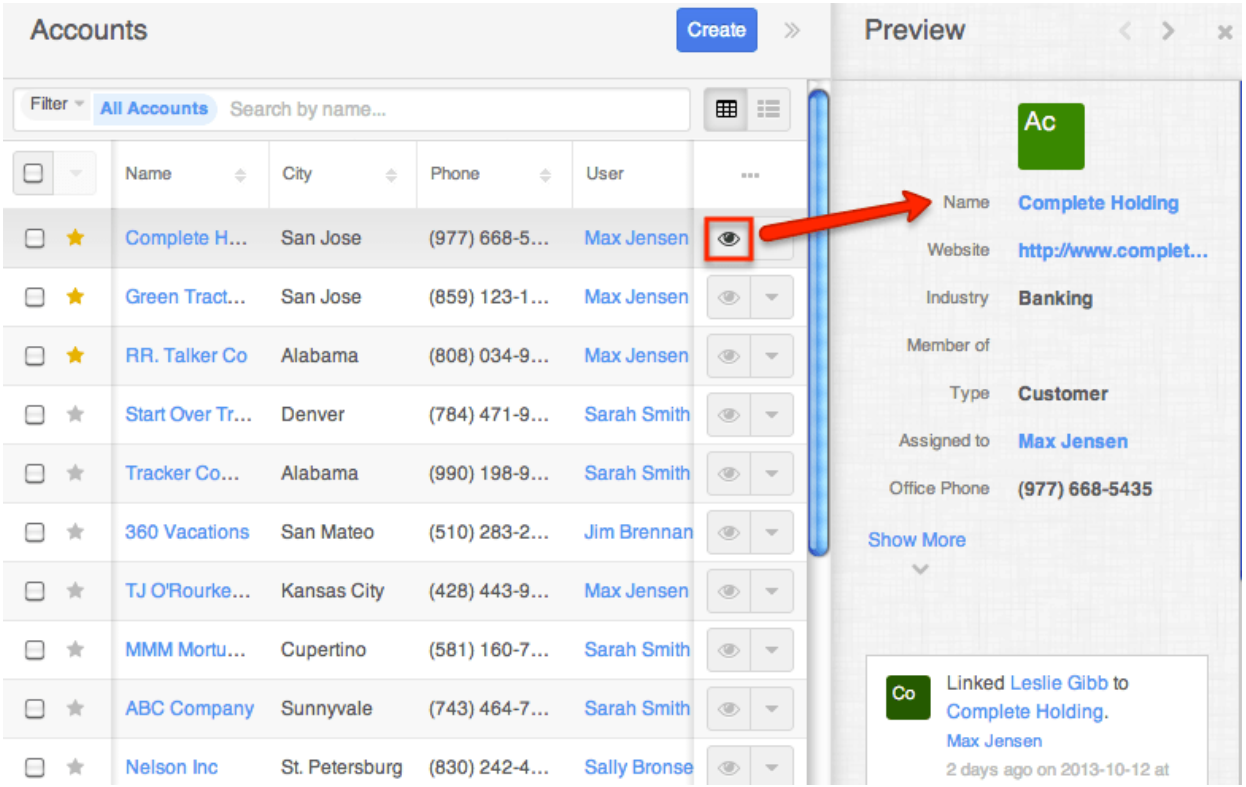
Users can view a record's details directly from the Home page activity stream, module's list view, or record view by clicking the Preview icon to the far right of a record's row or activity stream post. The record's detail will display in the intelligence pane to the right of the Home page activity stream, list view, and record view. It will provide users with key information regarding the record as well as the related activity stream information. For more information on activity streams, please refer to the Activity Streams documentation.

## Viewing Previews

There are various options available for viewing previews in Sugar including via the list view, record view, and activity stream. Previewing allows users to easily view key information regarding a record directly from the intelligence pane without navigating away from the current page. Users can mark a record to follow or unfollow via the preview by clicking the Follow or Unfollow button within the record's details. Clicking the hyperlinks (e.g. account name, website, email address, etc.) within the preview allow you to access the record view, external company website, compose email, etc. Please note that you cannot edit record's in preview.

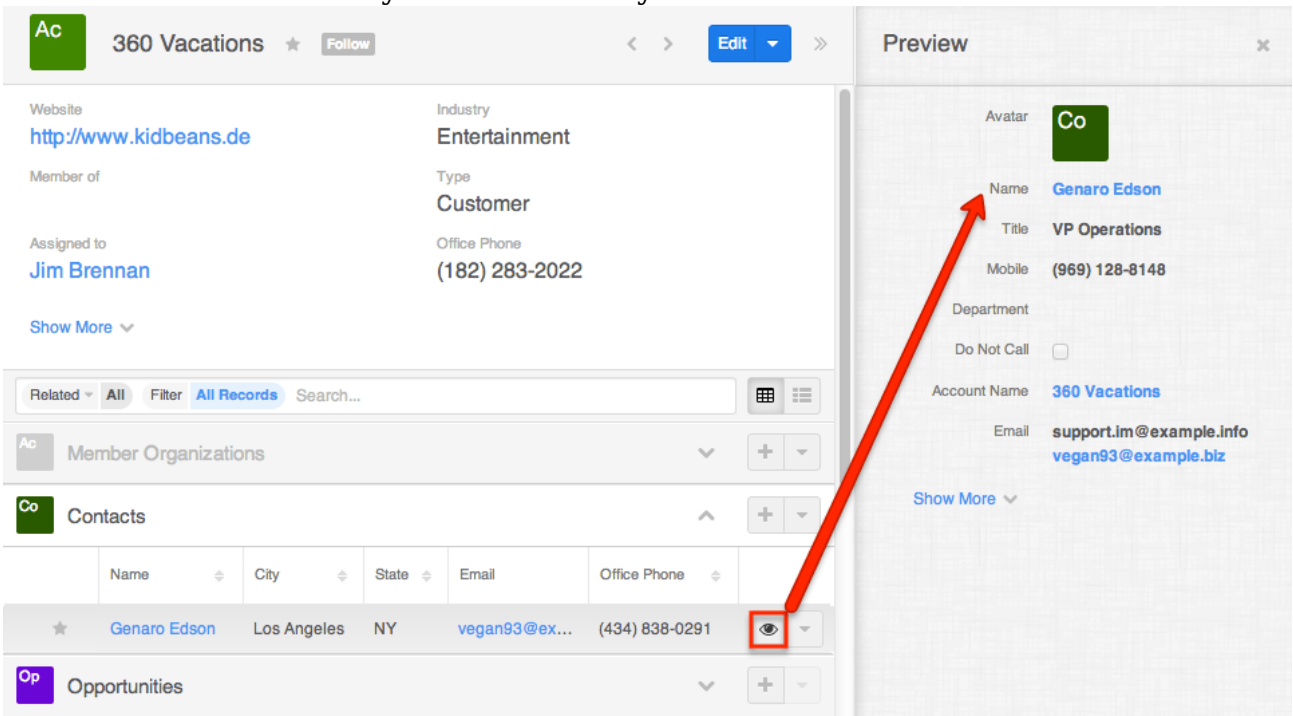
### Previewing From List Views

Users can view a record's details directly from the module's list view by clicking the Preview icon to the far right of each account's row. The intelligence pane will display the record's details with key information regarding the record as well as any related activity stream information.




## Previewing From Record View

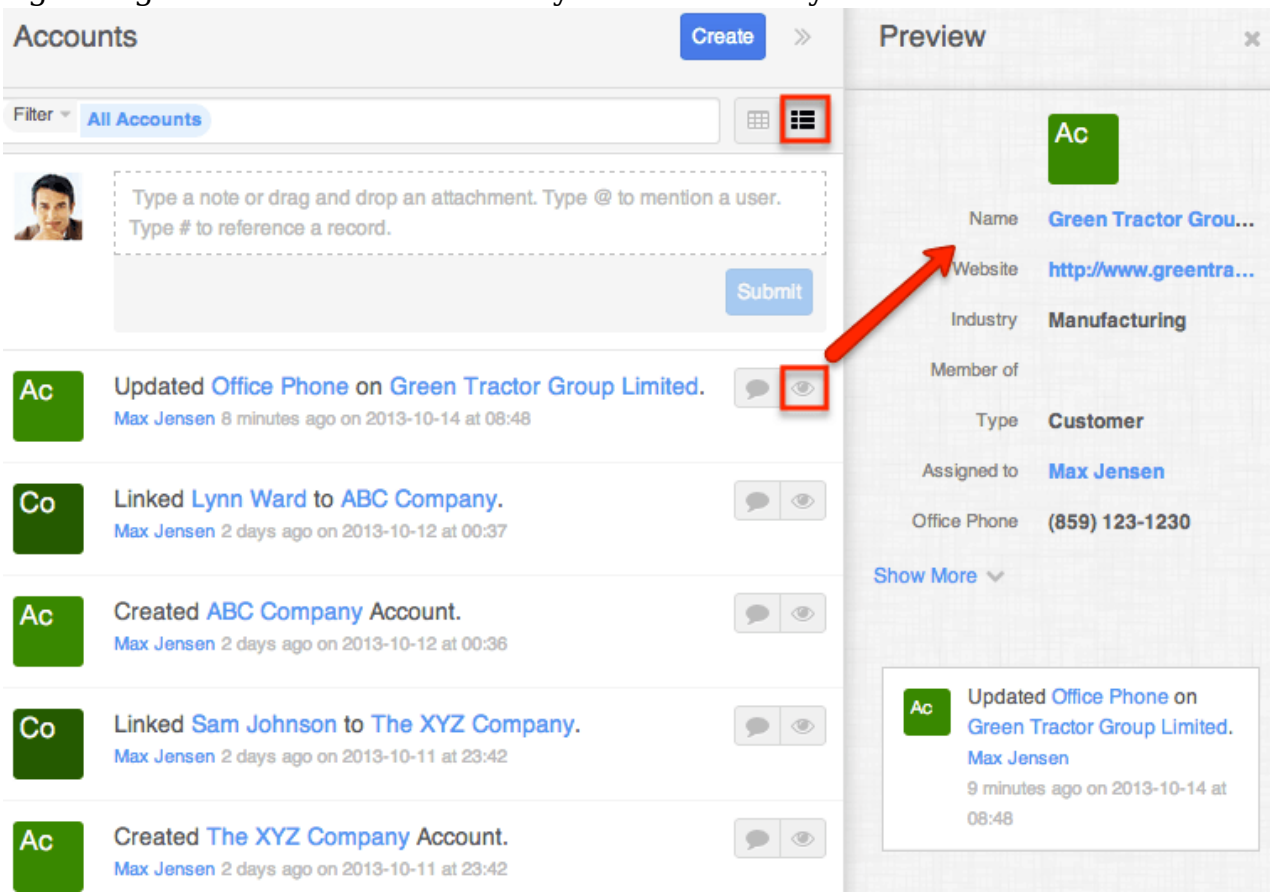
Users can also view a record's details from the module's record view by clicking the Preview icon to the far right of each record row in the subpanel. The intelligence pane will display the record's details with key information regarding the record as well as any related activity stream information.



Previewing From Activity Streams

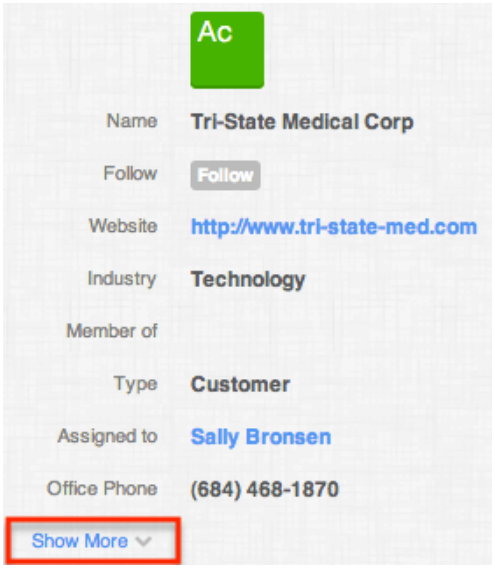
In addition you can also preview the record referenced in activity stream posts from the Home page, list view, and record view activity stream by clicking the Preview button to the right of each post. Please note that preview is only available for Create, Update, Relate, and Un-relate-type posts in the activity stream. For more information about previewing activity stream posts, please refer to the Previewing Posts section of the Activity Streams documentation.

The intelligence pane will display the record's details with key information regarding the record as well as any related activity stream information.



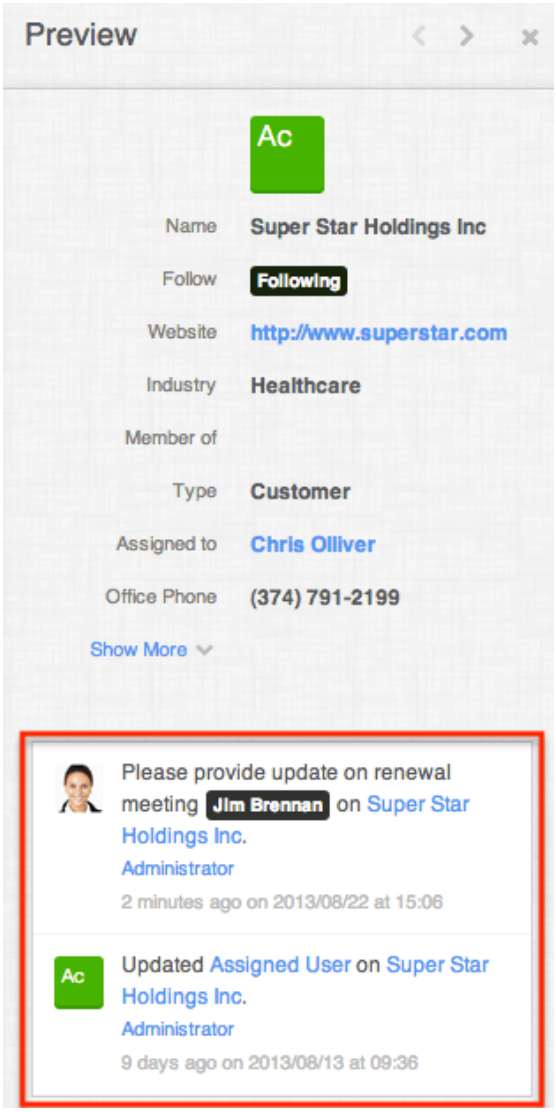

## Show More

The preview typically displays a few key fields (e.g. name, website, phone, etc.) for the record on the business card panel with the option to view more fields by clicking the Show More link on the bottom left. Please note that administrators can configure what fields appear on the business card panel via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.



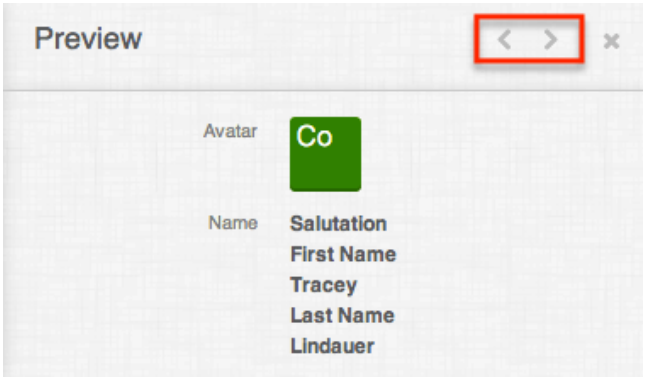

## Previewing a Record's Activity Stream

When previewing a record via the intelligence pane, you can also view any related activity stream posts which will appear below the record's detail. Please note that you cannot create new posts or comment on posts via the activity stream when previewing a record. For more information on creating posts and commenting on posts, please refer to the Activity Streams documentation.



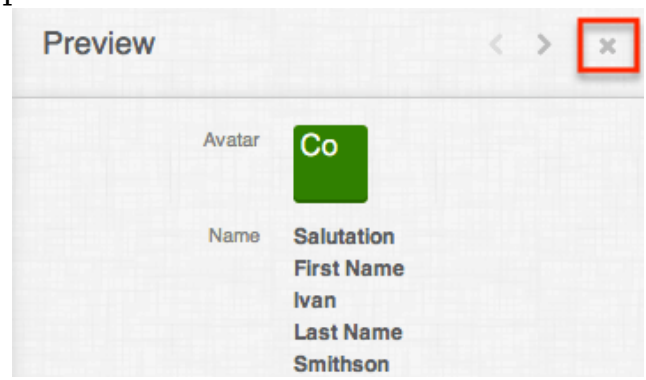

## Previewing Next and Previous Records

On the upper right of the intelligence pane, there is a Left and Right arrow button that allows you to scroll through the next and previous records. Clicking the Left arrow button displays the previous record's preview while clicking the Right arrow button displays the next record's preview. When previewing from the module's list view, you can scroll through the list view's current search results. When previewing a related module record from a module's record view, you can scroll through the list of related records in the specific subpanel.




### Closing a Preview

If you no longer wish to preview the records, you can simply close the preview by clicking the "X" on the upper right of the intelligence pane. Please note that the dashboard view will display again on the intelligence pane once you close the preview.




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# Accessibility

## Overview

SugarCRM enables users to quickly perform certain tasks using keyboard shortcuts to increase productivity and accessibility. Keyboard shortcuts can be used to navigate around the list view and record view layouts for Sidecar modules, allowing users quickly select records, inline edit records, preview records, etc. There are also global shortcuts available to perform tasks such as toggling the Quick Create menu, entering the Global Search field, etc. Please note that you can access the Keyboard Shortcuts help page in Sugar to view a table with the various shortcut keys along with the actions they perform.

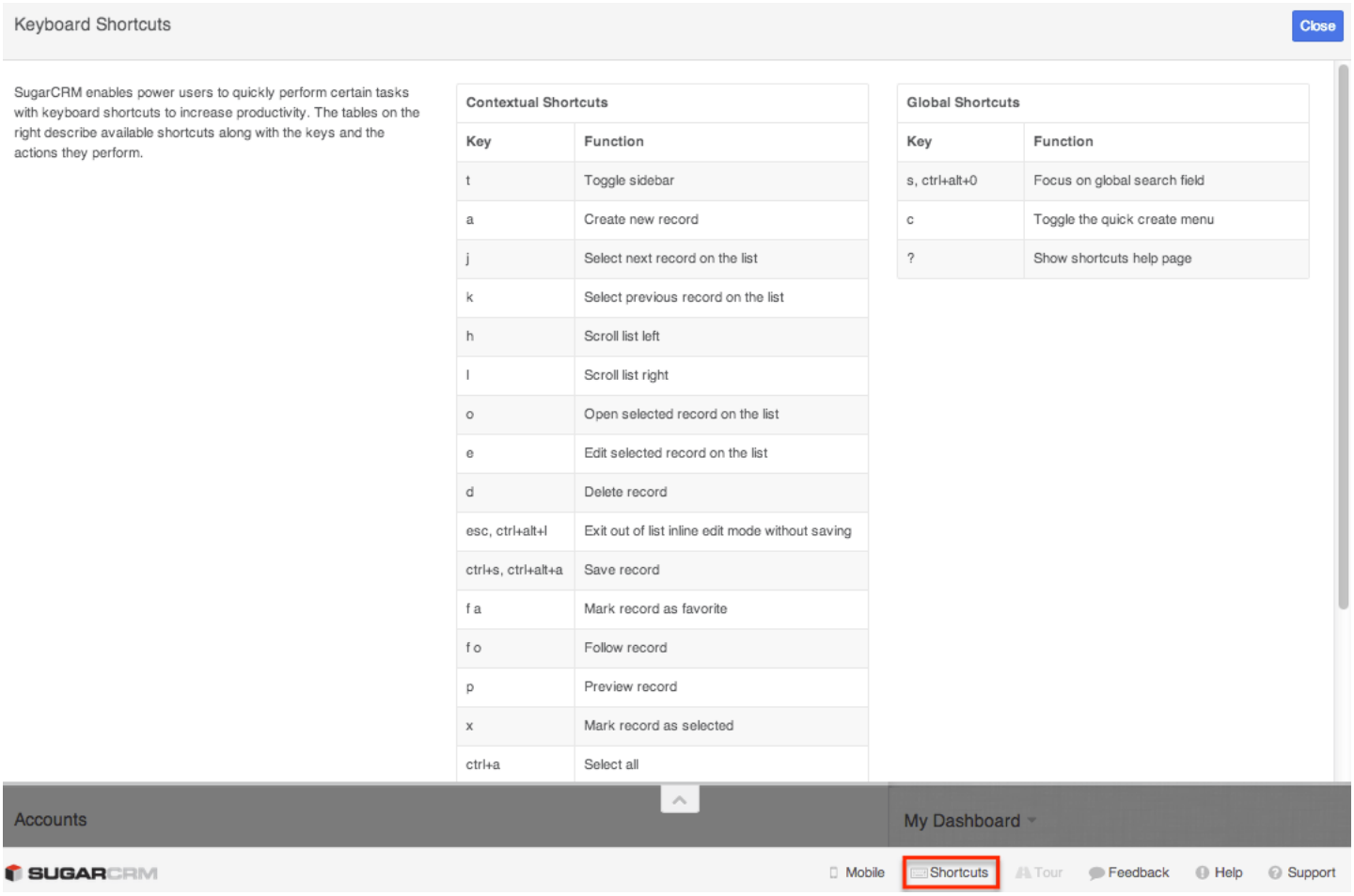
You can also navigate through Sugar's navigation bar using the Tab key on your keyboard as well as access the module's list view, Actions menu, etc. by hitting "Enter".

This documentation will cover the various keyboard shortcuts available as well as how to navigate around Sugar using your keyboard. For more information regarding accessibility for Sugar, please refer to the Accessibility information.

## Shortcut Keys

There are various shortcut keys available to easily perform actions in Sugar using your keyboard. You can use the shortcut keys to favorite a record, delete records, etc. in the Sidecar module's (e.g. Accounts, Contacts, etc.) list view and record view layouts. In addition, the global shortcuts can be utilized throughout the user interface to perform actions such as opening the Quick Create menu, accessing the Global Search field, etc.

You can access the Keyboard Shortcuts help page by either hitting the Shift and / key or clicking the Shortcuts link in Sugar's footer. The help page will display a table with the various shortcut keys available to use along with a description of the actions they perform. Simply hit "Esc" on your keyboard if you wish to exit the help page. Please note that the help page displays contextual shortcuts based on what you are currently viewing in Sugar. For example, if you are viewing the Mass Update panel in the Accounts list view, then the Keyboard Shortcuts help page will display shortcuts that specifically apply to this panel.




## Global Shortcut Keys

The global shortcut keys can be used to perform the following actions in Sugar's user interface:

| Key | Function |
|---|---|
| c | Toggle the Quick Create menu |
| esc, ctrl+alt+l | Exit the Global Search field |
| s, ctrl+alt+0 | Access the Global Search field |
| t | Toggle the Right Hand Side drawer in list view and record view |

## List View Shortcut Keys

The list view shortcut keys can be used to perform the following actions in the module's list view layout:

| Key | Function |
| --- | --- |
| + | Add field rows in the Mass Update or Filter panel |
| - | Remove field rows in the Mass Update or Filter panel |
| a | Create new record |
| ctrl+a | Select all records displayed on current set of list view results |
| ctrl+s, ctrl+alt+a | Save record |
| d | Delete record or custom filter in list view |
| e | Edit selected record in list view |
| esc, ctrl+alt+l | Exit out of certain elements (e.g. inline edit) in the list view |
| f+a | Mark selected record as a favorite<br><br>Note: Hit "f+a" again to remove the record as a favorite. |
| f+c, ctrl+alt+8 | Create a new list view filter |
| f+e | Edit custom list view filter |
| f+i, ctrl+alt+9 | Place cursor in list view search box |
| f+m | Open the list view filter menu |
| f+o | Mark selected record to follow or unfollow |
| h | Scroll list to the left |
| j | Select the next record on the list view |
| k | Select the previous record on the list view |
| l | Scroll list to the right to view additional fields in the list view |
| m | Open the mass actions menu<br><br>Note: Menu opens once at least one record is selected. |
| o | Open the selected record's (e.g. ABC Company) record view |
| p | Preview the selected record |
| r | Clear filter values |

| | |
|---|---|
| t | Toggle the Right Hand Side drawer |
| x | Mark the checkbox to the left of each selected record in list view |

### Record View Shortcut Keys

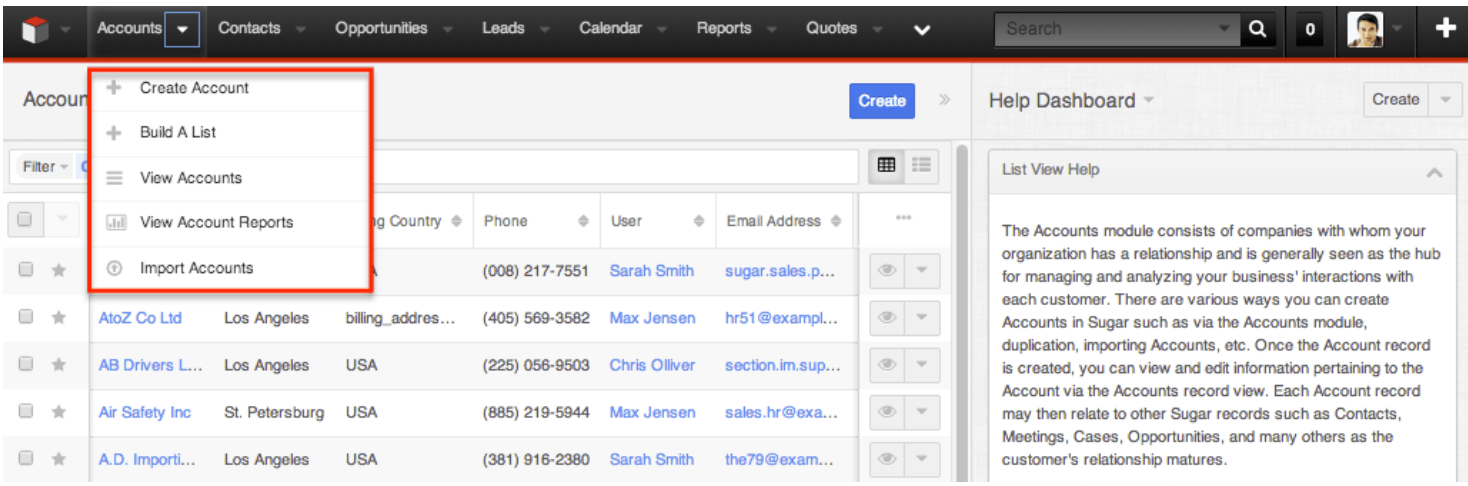
The record view shortcut keys can be used to perform the following actions in the module's record view layout:

| Key | Function |
|---|---|
| ctrl+s, ctrl+alt+a | Save the record |
| d, ctrl+alt+d | Delete the record |
| e, ctrl+alt+i | Edit the record |
| esc, ctrl+alt+l | Exit out of certain elements (e.g. edit view) in the record view |
| f+a | Mark record as a favorite<br><br>Note: Hit "f+a" again to remove the record as a favorite. |
| f+o | Mark record to follow or unfollow |
| h | Open the previous record |
| l | Open the next record |
| m | Open the record's Actions menu |
| shift+c, ctrl+alt+u | Copy the current record |
| t | Toggle the Right Hand Side drawer |

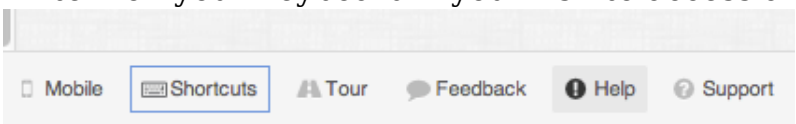
## Tabbing in Sugar

Using the Tab key (Alt+Tab for Safari browser) on your keyboard enables you to easily navigate through Sugar's navigation bar which spans across the top of the screen. Please note that the default tab order is from left-to-right. As you hit the Tab key, each option (e.g. home, module tabs, global search, notifications, etc.) on the navigation bar will be highlighted in blue, and you can press "Enter" if you wish to access the module's list view, actions menu, notification's page, etc. For example, if you press "Enter" on the triangle in the Accounts module tab, the corresponding actions menu will open and you can use your Up and Down arrow on your keyboard to select an option (e.g. Create Account, View Accounts, etc.). If you hit "Tab" again while the list view actions menu is open, you will navigate to

the next option (e.g. Contacts) on the navigation bar and the current actions menu will close.




In addition, you can continue to tab outside of the navigation bar to highlight and access certain elements (e.g. Create button, Search box, Intelligence Pane, etc.) of the home page, list view, record view, etc. For example, if you continue tabbing after you get to the end of the navigation bar while viewing the Accounts list view, the tab will move onto the various elements on the page highlighting buttons, actions menu, account names, etc. You can simply hit "Enter" if you wish to perform a specific action (e.g. create a record, open the actions menu, etc.) on the list view. The tab will go through all of the currently displayed records on the list view then move onto the intelligence pane and footer before going back to the navigation bar again. Please note that each link (e.g. Mobile, Shortcuts, Tour, etc.) in Sugar's footer will be highlighted as you tab from left-to-right. Simply hit "Enter" on your keyboard if you wish to access any of the links on the footer.




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# Search

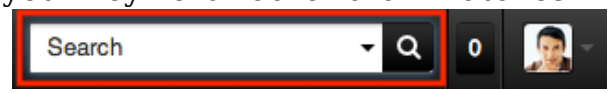
## Overview

Sugar comes with the ability to search across the entire system to easily locate and filter records in the system. Users can perform a search via the module's list view, record view, as well as global search. The module search allows you to locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the module list view or

subpanel view of the record. Global search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. This documentation will go over the basics of the various search options and cover how to perform a search, filter a search, view results, etc.

## Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. For more information regarding searching within a single module, please refer to the List View Search and Record View Search section in this documentation. The Global Search bar is typically located on the top right-hand side of each Sugar screen. Full Text Search is used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword.




Please note that not all fields in Sugar are enabled by default for search, but can be enabled by an administrator. For more information on how to enable and disable fields and modules in Global Search, please refer to the Studio documentation in the Administration Guide.

Also, Global Search may or may not be case-sensitive depending on your database configuration. In general, Global Search on Sugar installations running on MySQL and MSSQL databases are not case-sensitive. But global search on a Sugar installation running on Oracle is case-sensitive by default. If your instance is hosted on SugarCRM's on-demand platform, then its global search is not case sensitive. This allows searches performed for "rob" using a lowercase "r" to locate contact records in the system with a name of "Rob" with an uppercase "R".

Use the following steps to search for a contact name using Global Search:

1. Click into the Global Search box on the upper right of Sugar and type in your search (e.g. jane).
2. Sugar will begin searching the system once you enter in at least four characters into the search box.
    - Please note that up to five results will be displayed along with the field that met your search criteria for each result.
3. Click the record's name in the results dropdown list to access the record's

details.



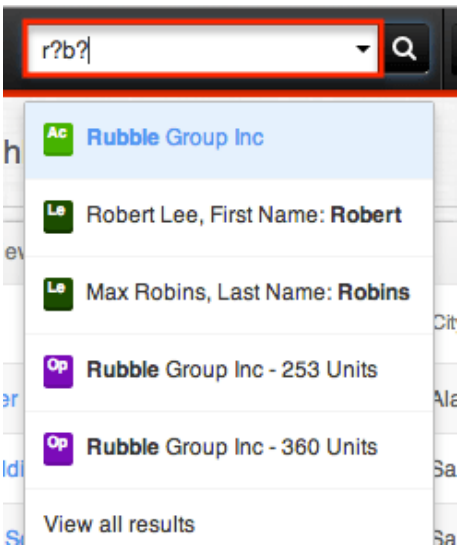

## Search Operators

Special search operator characters may be used to broaden or refine search results in Sugar. Use wildcard characters for a more flexible search or to fine tune results with the restrictive operators. Search operators can be combined for queries, but if quotation marks and wildcard characters are used together, the quotation marks will supersede the wildcard, resulting in a search for an exact match.

The following operators can be used in Global Search:

| Operator | Description |
|---|---|
| % or * | Use either of these wildcards to represent any number of characters, including zero. |
| ? | Use this wildcard to represent a single character. |
| "" | Restrict search results to exact matches of the entire word or group of words within the double quotes. Using quotes in combination with a wildcard will negate the wildcard resulting in an exact match search. |
| - | Do not include search results that contain the phrase that follows the minus sign. |

Please note that a wildcard is implied at the end of all search queries. For example, searching for "Acme" will match account names like Acme Industries or Acme Funds. Insert a wildcard before your search query with a % sign (%Acme) to match account names that begin with or contain the query, such as "ABC Acme Industries". If performing a multiple word search, the wildcard is only appended to the last word, not all words. If you click the search button or hit Enter/Return, the wildcard will no longer be appended and Sugar will only search for an exact match of your search criteria.



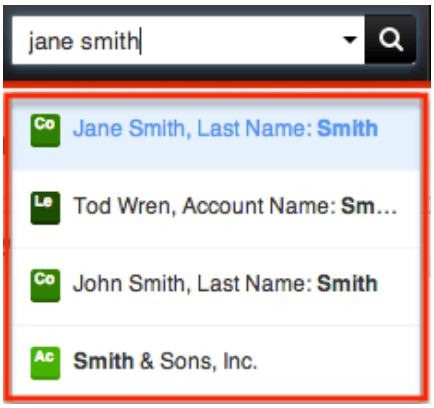

The following are examples of Global Search queries using search operators:

| Global Search Query | Module | Global Search Result |
|---|---|---|
| roy | Accounts | Kings Royalty Trust |
| | Contacts | Roy Bigger |
| | | Daron Royson |
| | Leads | Micah Higgins, Account Name: Kings Royalty Trust |
| | Opportunities | 500 Units for Kings Roy alty |
| %bert | Accounts | Filbert Flotsam Inc |
| | Contacts | Roberta Phillips |
| | Leads | Jessi Bertram |
| | Product Catalog | Liberty Widgets |
| r?b? | Accounts | Rubble Group Inc |
| | Contacts | Ruby Spilman |
| | | Murray Batdorf, Account Name: Rubble Group Inc |
| %s?i | Accounts | Calm Sailing Inc |
| | Cases | Need assistance with large customization |
| | Contacts | Shiloh Burgan |
| | Leads | Jarod Jiron, Account Name: Trait Institute Inc |
| ??it | Contacts | Robert Smith |

| | | |
|---|---|---|
| | | Fritz Weaver |
| r?b% AND smit% | Contacts | Robert Smith |
| | | Rob Smith |
| r?b% smit% | Contacts | Ruby Spilman |
| | | Janice Smithers |
| rob smith | Contacts | Jane Smith |
| | | Rob Johnson |
| | | Sally Ride, Account Name: Smith & Sons |
| "rob smith" | Accounts | The Rob Smith Corp |
| | Opportunities | 300 Units for Rob Smith and Jimmy Campbell |
| "smith" | Accounts | Smith & Sons |
| | Contacts | Rob Smith |
| smith -rob | Accounts | Smith & Sons |
| | Contacts | Jane Smith |
| %need %small | Case | Need assistance with large customization |
| | Case | Problem logging in with small password |
| %need AND %small | Case | Need assistance with small customization |

## AND vs OR

Global Search uses the "or" operator by default when multiple keywords are entered in the search box. For example, if you enter in "jane smith" into the search box, Sugar will look for records that match "jane" or "smith". In the example below, "Tod Wren" appears on the results list as the related Account name has "Smith" in it, and John Smith appears because his last name matches "smith".

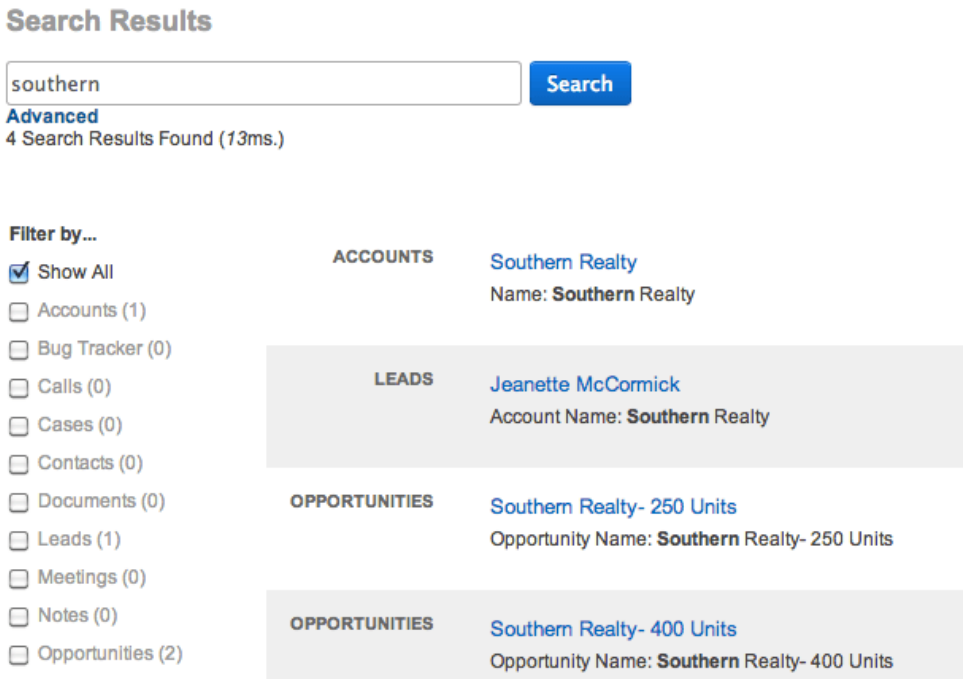



Another advantage Full Text Search has is the ability to overwrite the default "or" operator with an "and" operator. To use an "and" operator, simply add an all caps "AND" between the two words you are searching. Using the example above, you can perform an exact search to only return results for records that match both "jane" and "smith". Please note that the "AND" must be capitalized or Sugar will consider it a keyword to search on and the "OR" operator will be applied still.



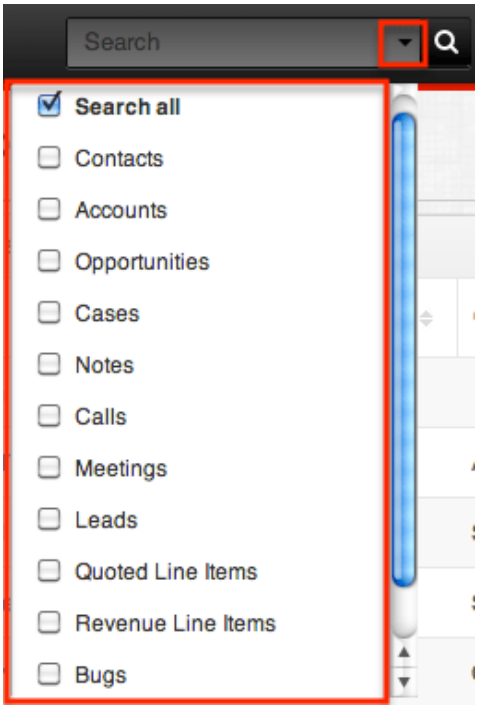

## View All Results

Click the View all results link at the bottom of the results window to see all results from your search. Here you will be able to see the modules and their respective counts on the left side of the page under the Filter by list as well as the search results. You can select the modules you wish to filter the search page by marking the specific modules you wish to view under the Filter by list.




## Filtering by Module

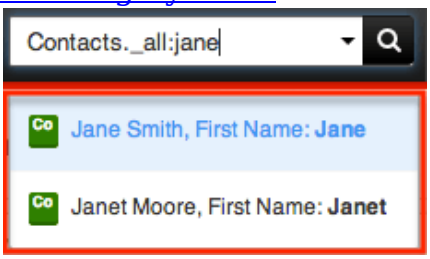
Global Search gives you the option to filter the search results by module. Click the triangle within the global search box then select the module(s) you wish to include in the search. By default, the Search all option is selected to include all modules when searching. To return search results for certain modules, mark the checkbox corresponding to the module(s) in the filter list. For example, if you select "Contacts" and enter in a contact name (e.g. joe) to search, Sugar will only return contact records with a matching name.



Alternatively, you can add a special command to your search criteria to filter the results to a specific module. For example, if you wish to search all fields in the Contacts module that contain the word "jane", you can enter the following as your search criteria: Contacts._all:jane.

This tells Full Text Search to search the Contacts module and all fields containing the word "jane". This can be done with any module that has Full Text Search enabled, including custom modules.

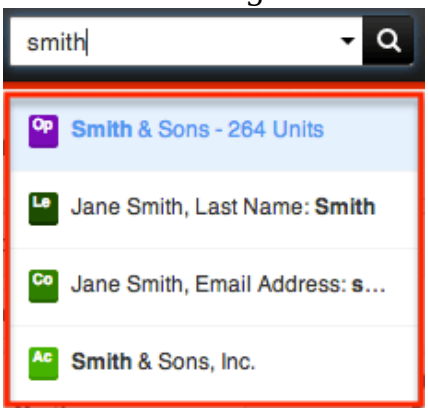
For more information on how to filter by module and field name, please refer to the Filtering by Field section below.




## Filtering by Field

Users have the option to filter their search by a specific field name or a field name in a specific module by entering in a special command. For more information on filtering by module, please refer to the Filtering by Module section of this documentation.

For example, if you wish to search for records in any module containing the word "smith", enter the keyword into the search box. Sugar will return records containing the word "smith" in the account name, contact name, email address, and any other field that is enabled for searching. For more information on how to enable fields for search, please refer to the Studio documentation in the Administration guide.




You can search by a specific field and value by entering in the field name (e.g. name, first_name, etc.) and the value into the search box. For example, you can enter "first_name:jane" if you wish to only search for records where the First Name

field contains the word "jane".




In addition, you can further filter the search by specifying a module to the criteria so that the search is only performed within a specific module. For example, you can enter "Contacts.first_name:jane" if you wish to only search for records where the First Name field contains the word "jane" in the Contacts module.




Please note that the search criteria must have the correct module name, field name, and be case sensitive. Using a lowercase "c" for Contacts will return no search results as it does not match the module name in the system. The field name must also be entered as it exists in Sugar, so please ask an Administrator to confirm the correct field names via Admin > Studio. For more information on accessing fields in Studio, please refer to the Studio documentation in the Administration guide.

## Admin Configuration

Sugar administrators have the ability to globally enable and disable modules for Global Search. Please note that disabled modules will not be included in search results nor in the list of modules to filter. For more information on how to enable and disable modules for Global Search, please refer to the Search section of the System documentation in the Administration guide.
Administrators also have the ability to enable and disable specific fields for Global Search, as well as set the priority of the field in the search. To give a field a greater weight when searching, you need to adjust that field's boost level (e.g. low boost, medium boost, etc.). When a search is performed, matching records containing fields with a greater weight will appear higher on the search results list. For more information on how to add or remove fields from Global Search or to change their boost level, please refer to the Studio documentation in the

Administration guide.

Note: If changes are made to your instance's full text configuration, users on SugarCRM Mobile must log out and back in for the corresponding fields to be displayed as expected.

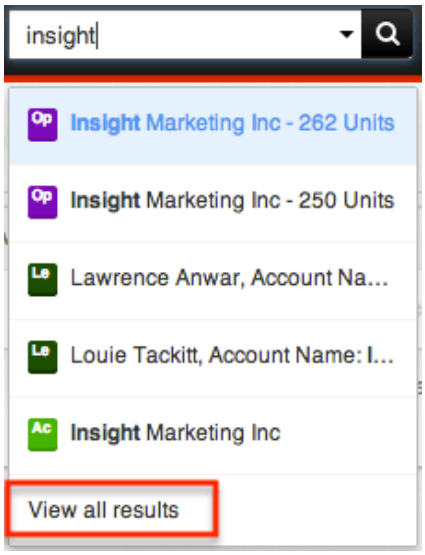
Global Search functions off of an index created from the data in your system. When creating and updating records, data is added and modified in the index accordingly. Occasionally the index can become corrupt or inefficient, which may require a system index to be performed. You can either perform a system index manually via Admin > Search or schedule it by creating a scheduler for the full text search index system job in Admin > Schedulers. For more information on how to run a system index on Full Text Search, please refer to the System documentation in the Administration guide.For more information on automating a system re-index, please refer to the Schedulers documentation in the Administration guide.

## Advanced Options

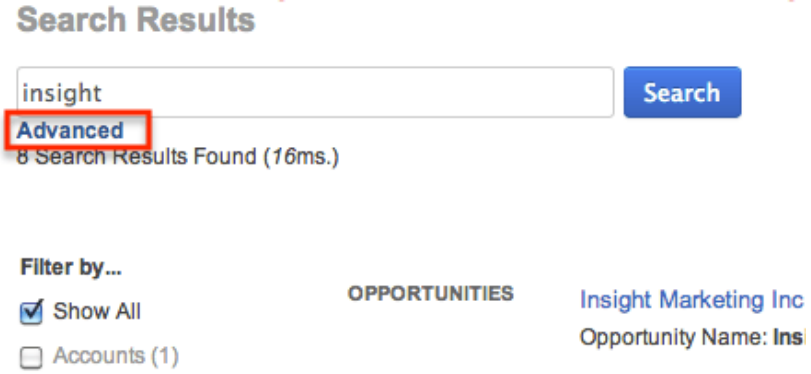
The Advanced Options panel is available on the view all results screen of Global Search to allow users to enable and disable modules for the Filter by list specific to their login. Please note that administrators have the ability to globally enable and disable modules for global search via Admin > Search. If the administrator globally disables a module, you will not be able to perform a search on that module or filter by that module when searching. The module will also no longer appear within the Advanced Options panel. For more information on how to globally enable and disable modules, please refer to the System documentation in the Administration guide.

The following steps cover disabling the Leads module from the View all results page of Global Search as an example:

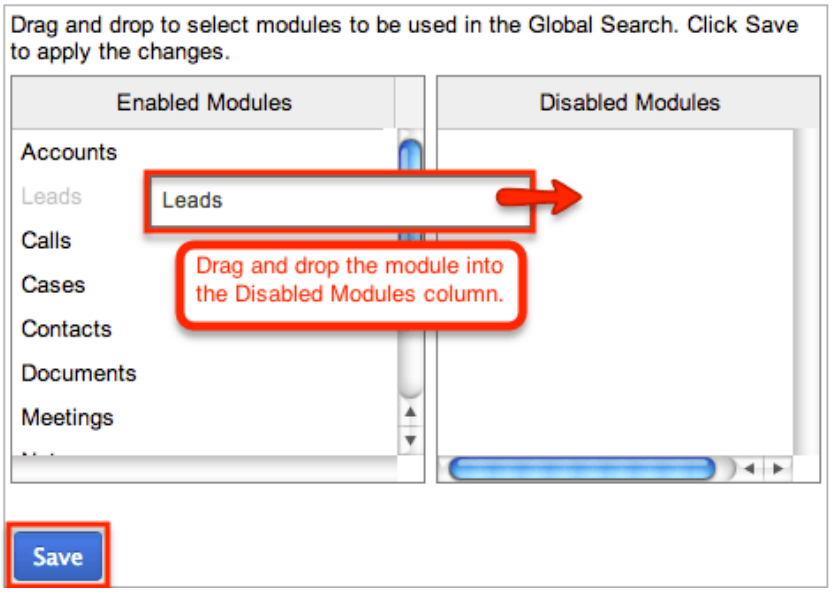
1. Perform a search via Global Search then click "View all results" at the bottom of the pop-up results list.



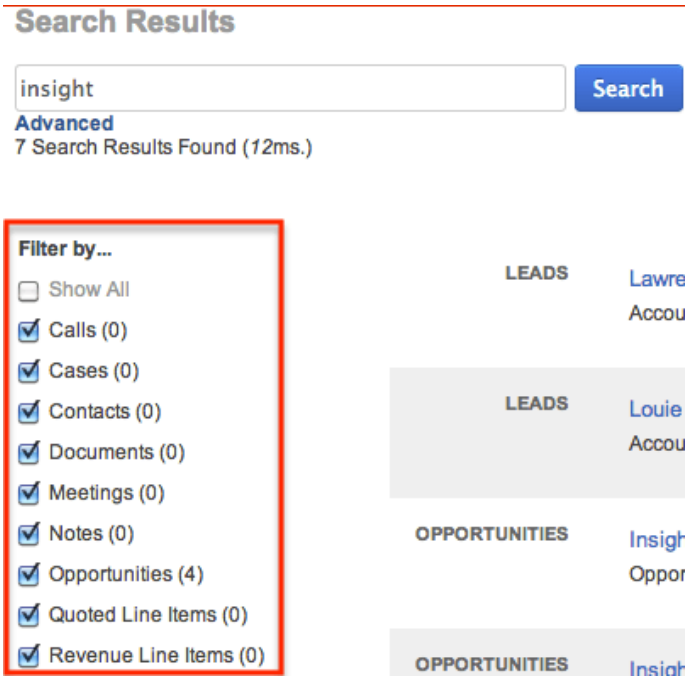

2. Click the Advanced link beneath the search box on the upper left to display the modules filter.




3. Drag and drop the Leads module from the Enabled Modules column to the Disabled Modules column then click "Save" to preserve the change.
    - You can enable the module for search again by simply dragging and dropping the module from the Disabled Modules column to the Enabled Modules column.



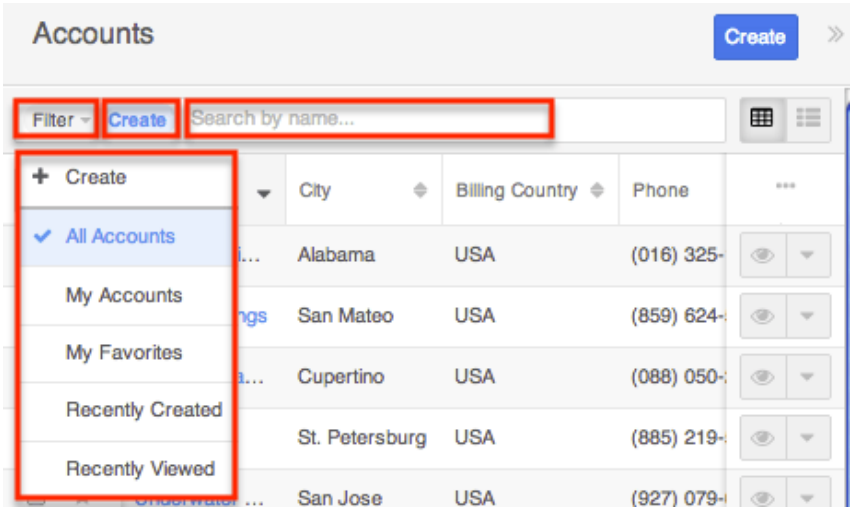
The Filter by list on the View all results page will no longer include the Leads module. Please note that module's in the Disabled Modules column are disabled only for the currently logged in user and will affect any future global searches until the module is re-enabled in the Advanced Options panel.




## List View Search (Sidecar Modules)

List view search enables users to easily and effectively search by a record name in a module-specific manner to return relevant results they wish to view. The matching records will populate in the list view below the Search bar. Please note that the system retrieves all records that start with the keyword entered in the search. Sugar's list view search also supports wildcard characters (e.g. %) to search for records without including the entire word in the search query. For example, a search for "%univ" will pull up any records containing "univ", including "The University of Miami", "Miami University" or "Universidad de Miami". For more information on how to use wildcards in list view searches, please refer to the

In addition, the search provides a Filter option allowing you to narrow your search further using the available options on the list. For more information on the available filter options, please refer to the Filter section of this documentation.




When you choose a filter and run a search, Sugar will return records with a matching name from within the filtered list view results. For example, if you select "My Accounts" in the Filter list and enter an account name, Sugar will only return account records with a matching name that are assigned to you. You can also create new filters if you wish to add more complex filters for your search criteria. For more information on creating new filters, please refer to the Creating a Filter section of this documentation.

To see all records to which you have access, simply select the All "Module Name" (e.g. All Accounts) option in the filter. Please note that you will only be able to see records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

## Wildcards

Wildcards can be used to search for criteria without including the entire word in the search. Use a wildcard character in place of characters you do not require in your search. You may use any combination of wildcard characters in the Search box as you desire. The following wildcard characters can be used in the List View search box:

| Character | Wildcard Use |
|---|---|
| % | Matches any number of characters, including zero |
| _ | Matches only one character |

Please note that module search automatically appends the wildcard character (%) to the end of your search phrase for each text field. This allows the system to pull up all records that include the keyword entered in the search.

When performing a multiple-word search, Sugar will behave differently based on the module (e.g. Accounts, Contacts, etc.) in which you perform the search. For example, performing a search for "Max Hold" in the Accounts module will match an account named "Max Holding Company" but will not match "Maximum Holding Company" because the wildcard is appended to the end of the entire query (e.g. Max Hold%). However, if the same search is performed for "Max Hold" in the Contacts module, it will return search results matching a contact named "Max Holder" as well as "Maximillian Holder" because it appends a wildcard to the end of each word in the query (e.g. Max% Hold%). Please note that the latter behavior applies to any person-type module (e.g. Leads) to account for search results that may contain multiple words in the First Name and/or Last Name field (e.g. "Jean Paul" as a first name).

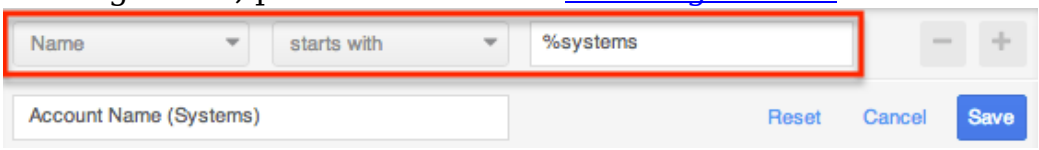
The following search examples illustrate List View search behavior:

| Search Criteria | Matching Search Results | |
|---|---|---|
| | First Name | Last Name |
| rob | Rob<br>Roberta<br>John | Smith<br>Collins<br>Roberts |
| %bert | Bert<br>Roberta<br>John | Andernie<br>Collins<br>Roberts |
| r_b | Roberta<br>Ruby<br>John | Collins<br>Lieu<br>Roberts |
| %r_b | Rob<br>John<br>Mirabel | Smith<br>Roberts<br>Glaston |
| __it | Rob<br>Anita | Smith<br>Nother |
| r_b% smit% | Robert<br>Rob | Smith<br>Smite |
| rob smith | Rob<br>Robert<br>Rob Roy | Smith<br>Smith<br>Smith |
| smith | Rob<br>Smith | Smith<br>Johnson |
| jean | Jeannine<br>Jean Paul | Pugh<br>Gaultier |
| paul | Sue<br>Paul | Paulson<br>Jones |

| | | |
|---|---|---|
| jean paul | Jean<br>Jean Paul | Paul<br>Gaultier |

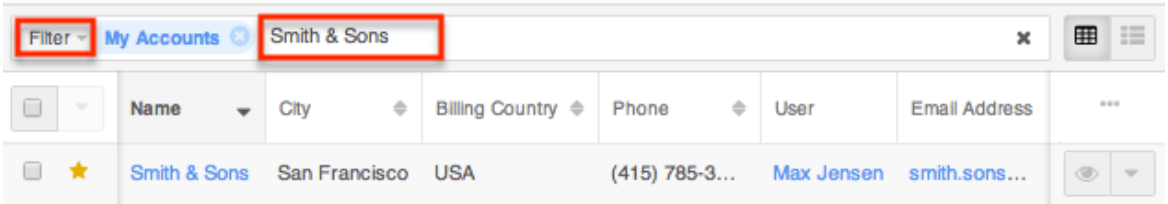
When performing a search, Sugar will try to match your search text to the beginning of a record's field. So, if an account name starts with an article like "A" or "The", this must be accounted for in the search by adding a wildcard (%) at the beginning of your text. For example, to properly pull up an account named "The ABC Company", you will have to enter "%abc" for Sugar to find a match in the system.

In addition, you can use the wildcard character when specifying the search criteria for custom filters with the "starts with" operator. Please note that the wildcard character will only work with the "starts with" operator. For example, if you wish to find all records containing the word "systems", then you can use the "starts with" operator and type "%systems" as the filter value. For more information on creating filters, please refer to the Creating a Filter section of this documentation.

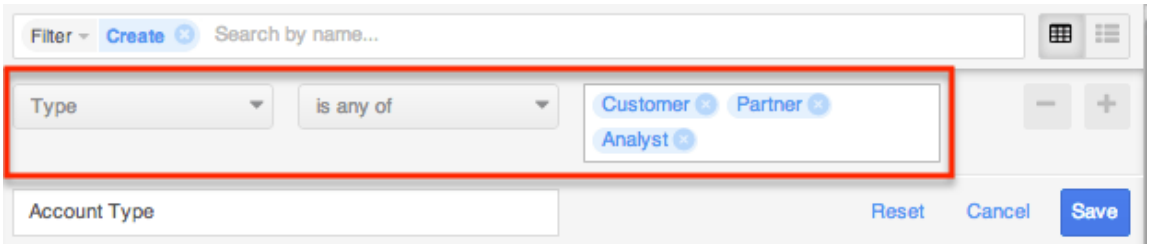



## AND vs OR

When searching in the List View search, Sugar uses the "and" operator. This means that if you are searching against multiple fields in your filter option, Sugar will place an "and" in between each search field returning only records matching all (as opposed to any) of your search criteria. For example, if you select "My Accounts" in the Filter options and enter an account name, Sugar will only return account records with a matching name that are assigned to you.




The only time Sugar will use the "or" operator is when using a multi-select option in the search criteria. For example, you can create a custom filter for the Accounts list view search and select "Type", "is any of", then add "Customer", "Partner", and "Analyst". If you perform a search based on this new filter, the system will return account records that match any one of the values specified in the filter. For more information on creating custom filters, please refer to the Creating a Filter section of this documentation.




Please note that if any additional fields (e.g. industry, status, etc.) are added to the custom filter, the operators between the Type field and the other fields will be an "and" operator.

## Filter

Module search provides a Filter option which allows users to narrow their search further using the available options on the list.

The following options are available to users when filtering their List View search:

- Create : Create a new custom filter which you can use to filter your search
- All "Module Name" : Returns all records in the module to which you have access
- My "Module Name" : Returns only records assigned to you
- My Favorites : Returns only records you have marked as favorites
- Recently Created : Returns only records you created in the module within the last 7 days
- Recently Viewed : Returns only records you have viewed in the module within the last 7 days

When you choose a filter and run a search, Sugar returns records with a matching name from within the filtered list view results. You can use one of the default filter options from the list or create a custom filter if you wish to have more complex filters options when searching.

### Creating a Filter

Users can also create new filters via the Create option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the module's list view. You have the option to add multiple fields to your new filter and set select operators (e.g. is any of, is, starts with, etc.) along with their value(s). A filter's criteria need to be true for a record in order for it to appear in the list view search result. Additionally, filters with no specified values may be saved as a custom filter to act as a filter template when a user often searches using

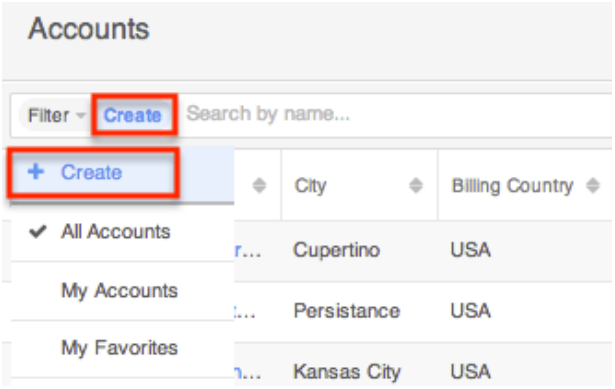
the same fields but with varying values. Please note that only fields you have view access for will appear in the Filter list when creating a search filter.

Note: Flex Relate-type fields are not available when creating search filters.

When you run a search using a created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.

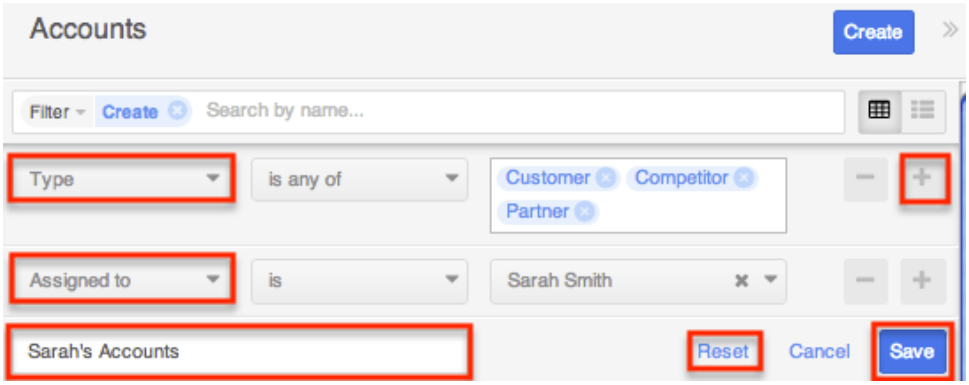
The following steps cover creating a filter for accounts with a type of "Customer", "Competitor", or "Partner", assigned to Sara Smith as an example:

1. Click the Filter option on the Accounts search bar then select "Create".
    - Note: You can also click "Create" to the right of the Filter option.

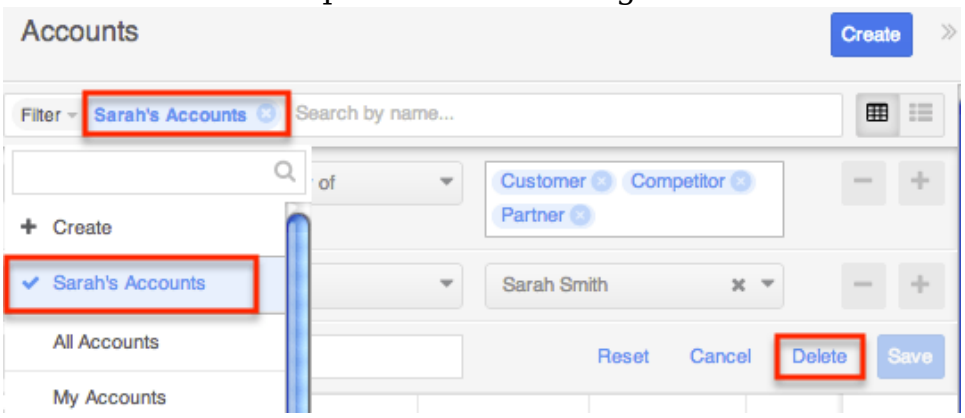



2. Select "Type" as the filter field and select the "is any of" operator then add "Customer", "Competitor", "Partner" as the search values. As you create the new filter criteria, it will be applied to the list view concurrently to display the matching results.
    - Note: The "is any of" operator allows the system to return records that match any one of the set values (customer, competitor, partner).
    - To remove specific filter values (e.g. customer, partner, etc.), you can simply click the "x" to the right of the field or you can select "Reset" to the left of the Save button to clear all filter values.
3. To add additional fields (e.g. Assigned to) to the new filter, click the Plus button to the right of the filter dropdown list.
4. Select "Assigned to" as the secondary filter field and select the "is" operator then add "Sarah Smith".
5. Enter in a name for the new filter (e.g. "Sarah's Accounts").

6. Click "Save" to add this filter to the module's Filter dropdown list.

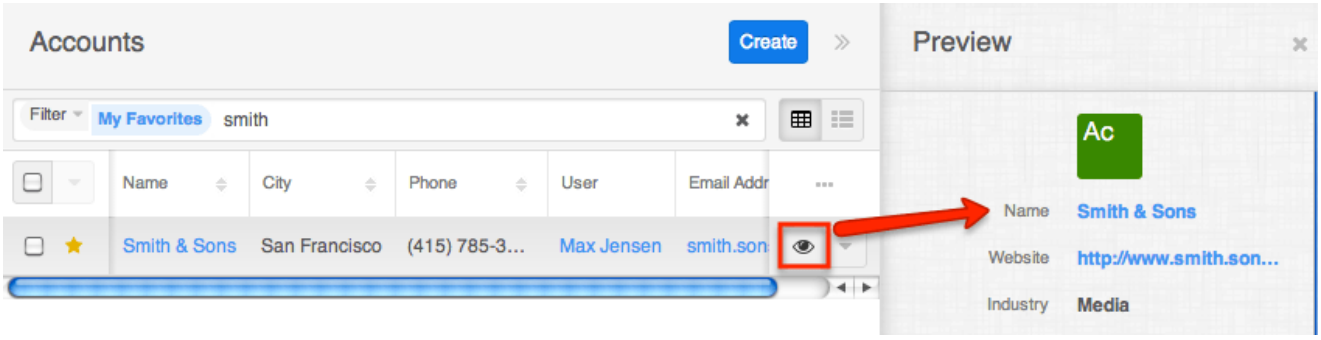



The newly created filter will now appear as an option in the list view search's Filter list. Please note that you can easily delete custom filters by selecting the filter (e.g. Sarah's Accounts) from the Filter list, clicking the filter's name (e.g. Sarah's Accounts) on the Search bar, then clicking "Delete" on the filter details panel. You can also edit the custom filter as necessary via the filter details panel then click "Save" to preserve the changes made.




## Preview

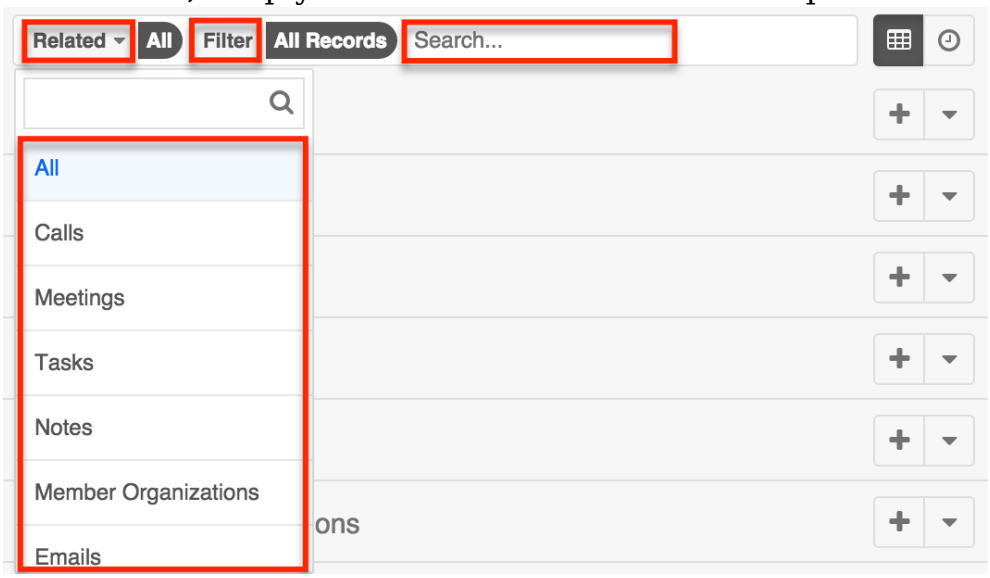
Once the list view displays the search results, users can easily view the record's details directly from the module's list view by clicking the Preview icon to the far right of the record's row. The record's detail will display in the intelligence pane to the right of the list view and provide users with key information regarding the record as well as the related activity stream information. For more information on viewing previews, please refer to the Viewing Previews section of the Intelligence Pane documentation.




## Record View Search (Sidecar Modules)

Users also have the ability to search for related records which appear in the subpanels of the record view. The Search bar appears below the record's fields and you can filter the view to only display a specific module (e.g. Leads, Contacts, etc.). You can search by a record name by entering the keyword into the Search bar, and the subpanel(s) with the matching record(s) will appear below. Please note that the system will retrieve records from the subpanel that start with the keyword entered in the search box. To clear the search, simply click the "x" to the right of the search keyword and all records meeting the search criteria will display in the corresponding subpanel(s).

To filter, simply click the Related option to the far left of the Search bar and select the module whose subpanel you wish to view. For more information on how to filter records for search, please refer to the Filter section of this documentation. Please note that filter and search may be combined to only display matching records within the selected module's subpanel. To see all subpanels to which you have access, simply select "All" in the Related dropdown list.

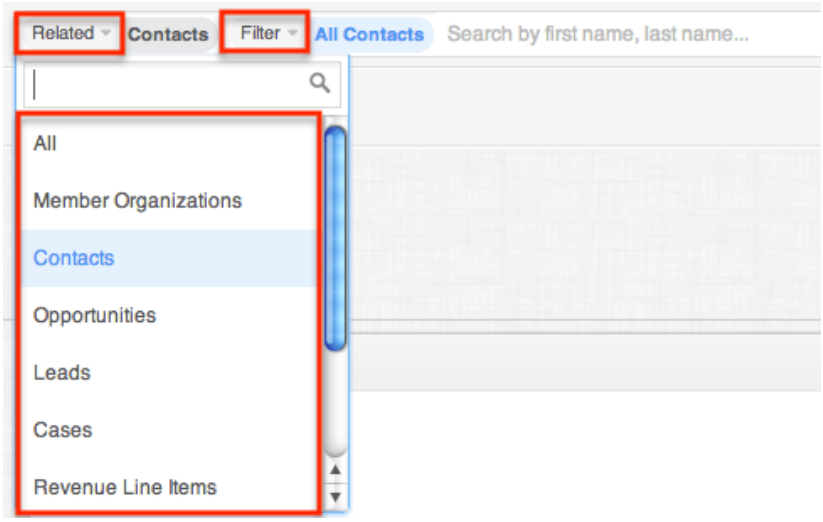


## Related Records Search

Users can search for related records simply by entering in the name of the record in the Record View's search box. Please note that the system will only search for related records which appear in the subpanels of the record view. The relevant record(s) meeting the search criteria will display in their respective subpanels. Users have the option to filter the view to only display a specific module if they wish by selecting the module (e.g. Contacts, Leads, etc.) from the Related list. For more information on searching by a specific module, please refer to the Related Module section of this documentation.

### Related Module

When searching for records which appear in the subpanels of the record view, you can filter the view to only display a specific module (e.g. Leads, Contacts, etc.). Simply click the Related option to the far left of the Search bar then select the module whose subpanel you wish to view. Please note that you can narrow your search further using the Filter option to the right of the Related option. For more information on searching using the Filter option, please refer to the Filter section of this documentation. To see all subpanels to which you have access, simply select "All" in the Related dropdown list.




### Wildcards

Wildcards can be used to search for criteria without including the entire word in the search. Use a wildcard character in place of characters you do not require in your search. Use may use any number of wildcard characters in any combination you desire. Search operators can be combined for queries, but if quotation marks and wildcard characters are used together, the quotation marks will supersede the wildcard, resulting in a search for an exact match. The following wildcard

characters can be used in the related module filters in Sugar:

| Character | Wildcard Use |
| --- | --- |
| % | Use this wildcard to match any number of characters, including zero |
| _ | Use this wildcard to match a single character |

For more information about using wildcard characters, please refer to the Wildcards section of this page's List View documentation. For more information on creating filters, please refer to the Creating a Filter section of this documentation.

Filter

Record view search provides a Filter option which allows users to narrow their search further using the available options on the list.

The following options are available to users when filtering their Record View search:

- Create : Create a new custom filter which you can use to filter your search.
- All "Module Name" : Returns all records in the module to which you have access
- My "Module Name" : Returns only records assigned to you
- My Favorites : Returns only records you have marked as favorites
- Recently Created : Returns only records you created in the module within the last 7 days
- Recently Viewed : Returns only records you have viewed in the module within the last 7 days

While in the record view, users can search for records which appear in subpanels beneath the record's fields and filter the view to only display a specific subpanel (e.g. Contacts, Accounts, etc.). When you choose a filter and run a search, Sugar returns records matching the search criteria for the specified related module in the record view. You can use one of the default filter options from the list or create a custom filter if you wish to have more complex filter options when searching.

Creating a Related Records Filter

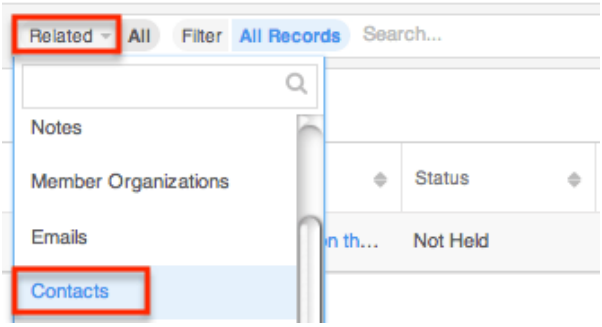
Users can also create new filters via the Create Filter option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the module's record view. You have the option to add multiple fields to your new filter and set select operators (e.g. is any of, is, starts with, etc.) along with the

value(s) it must contain. Please note that each one of the filter's criteria need to be true for a record in order for it to appear in the subpanel view's search result. Unlike creating a filter for the list view search, you must first select a module from the Related list then select the Create option as it is specific to that module.

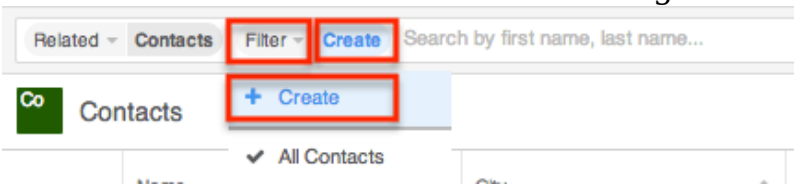
Note: Flex Relate-type fields are not available when creating search filters.

The following steps cover creating a filter for the related Contacts module located in the state of "CA" as an example:

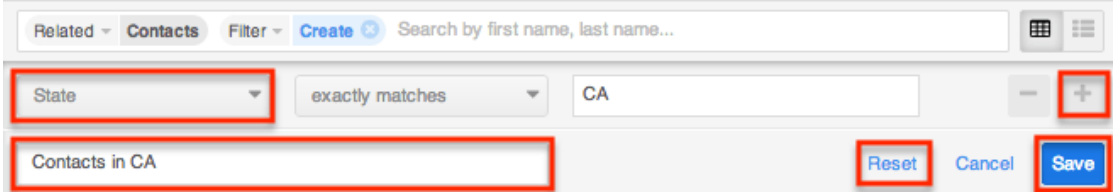
1. Click the Related option on a module record view's (e.g. Accounts) search bar then select "Contacts".




2. Click the Filter option on the Search bar then select "Create".
    - You can also click "Create" to the right of the Filter option.

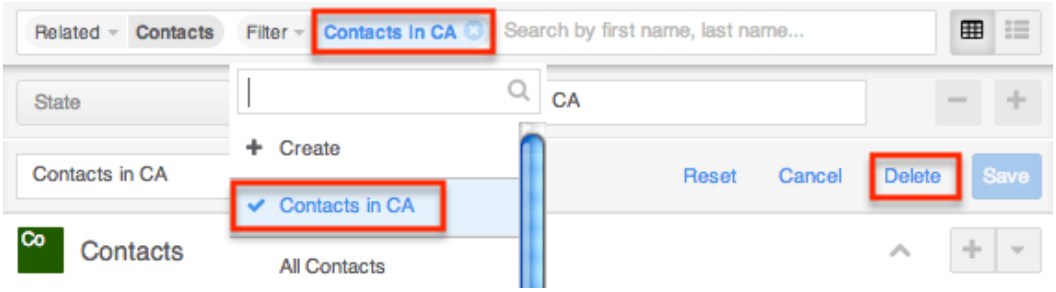



3. Select "State" as the filter field and select the "exactly matches" operator then enter "CA" as the search value. As you add in the filter criteria's, it will be applied to the subpanel view concurrently to display any matching results.
    - To clear any filter values (e.g. CA), simply select "Reset" to the left of the Save button.
    - You can also remove filter values by clicking the "x" within the search value (if applicable).
4. To add additional fields (e.g. Assigned to) to the new filter, click the Plus button to the right of the filter dropdown list.
5. Enter in a name for the new filter (e.g. "Contacts in CA").
6. Click "Save" to add this filter to the related module's Filter dropdown list.



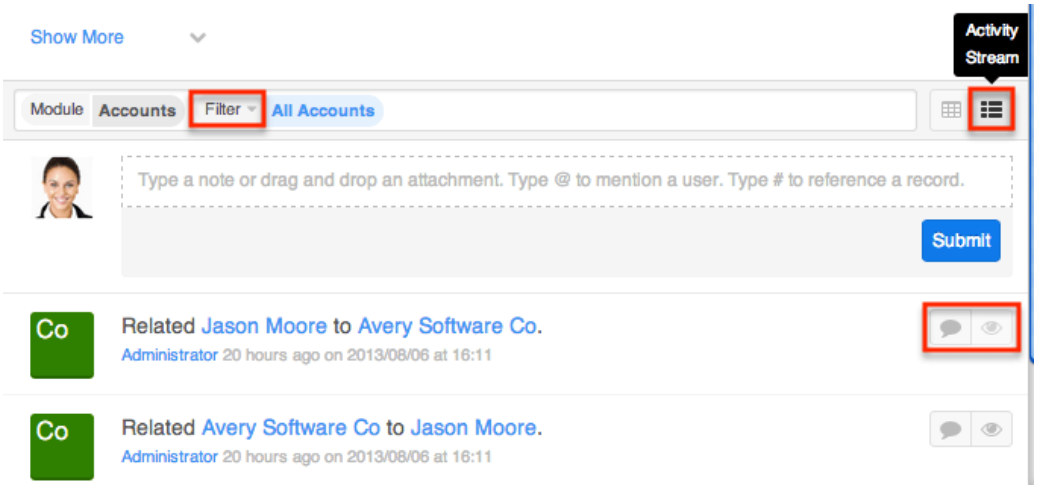

The filter will now appear as an option in the Filter list when "Contacts" is selected

as the related module. Please note that you can easily delete custom filters by selecting the filter from the Filter list of the related module (e.g. Contacts), clicking the filter's name (e.g. Contacts in CA) on the search bar, then clicking "Delete" on the filter details panel. You can also edit the custom filter as necessary via the filter details panel then click "Save" to preserve the changes.




## Activity Stream Search

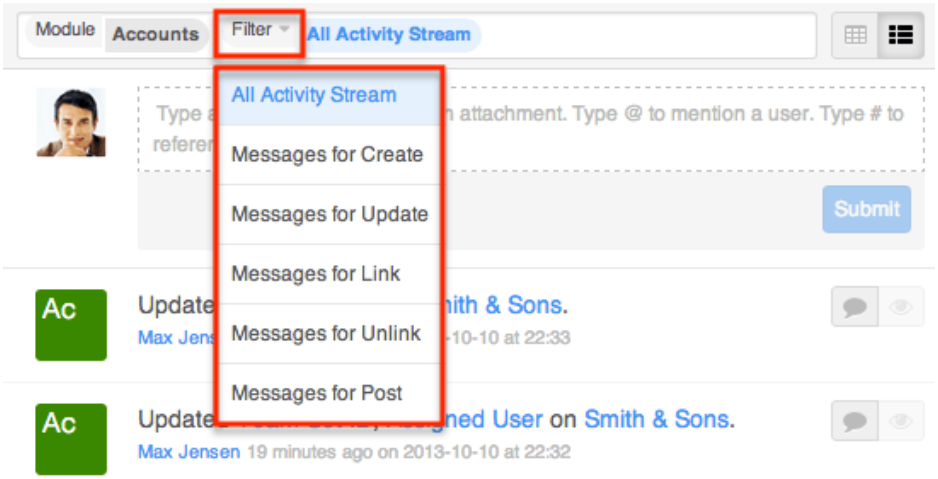
The record view's activity stream displays all posts specific to the current record you are viewing. Please note that users can view all post's in the record view's activity stream even if they do not follow the record in Sugar. To access the record view's activity stream, navigate to the module's record view (e.g. ABC Company) then click the Activity Stream button below the module's fields. For more information on activity streams, please refer to the Activity Streams documentation. You can filter the posts on the activity stream based on the activity type by selecting one of the available options on the Filter list. For more information on filtering the activity stream, please refer to the Activity Type Filter section of this documentation.




### Activity Type Filter

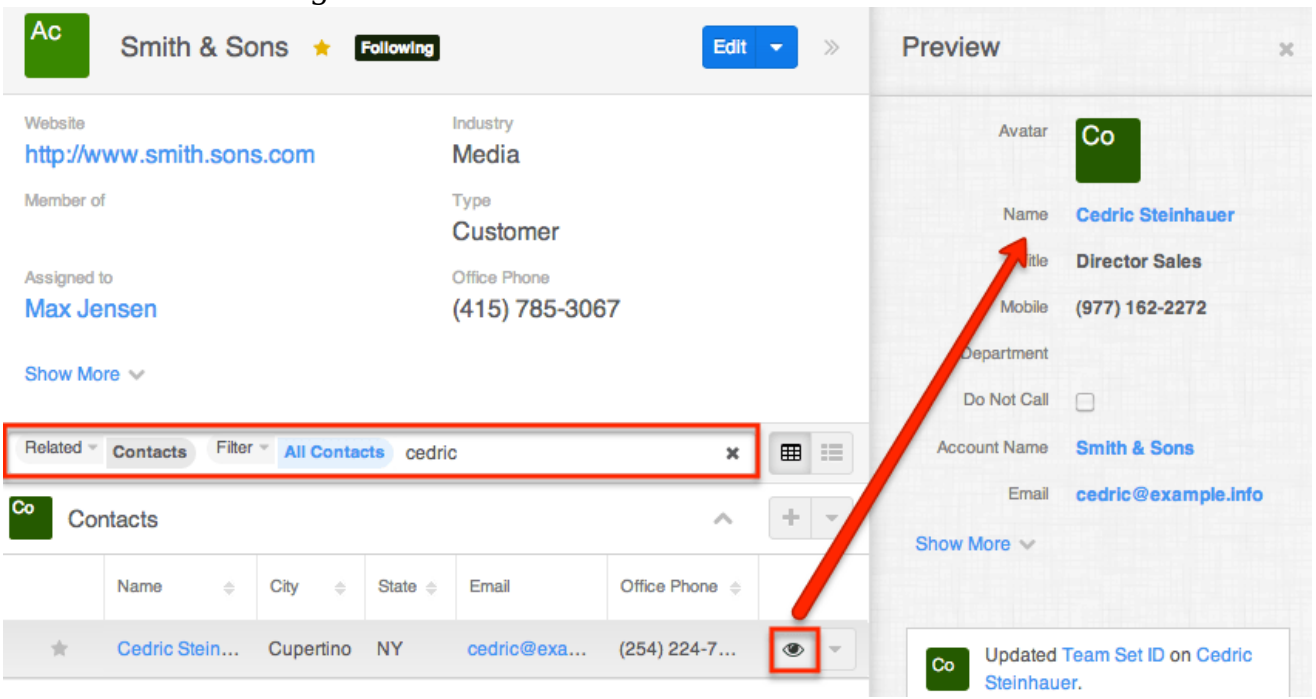
The record view activity stream can be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the

post input box then selecting the desired message type. This enables users to filter the activity stream to only display specific activity type's they wish to view. To view all posts in the activity stream, simply select the All Activity Stream option in the Filter list.




## Preview

Once the subpanel view displays the search results, users can easily view the related record's details directly from the record view by clicking the Preview icon to the far right of the record's row. The record's detail will display in the intelligence pane to the right of the record view and provide users with key information regarding the record as well as the related activity stream information. For more information on viewing previews, please refer to the Viewing Previews sectionof the Intelligence Pane documentation.



# List View Search (Legacy Modules)

Modules using the Legacy user interface in Sugar has a list view with basic and advanced search functionality to help you find records easily and effectively in a module specific manner. These module-specific searches differ from global search in that you search by specific fields in a specific module, instead of across your entire Sugar database.

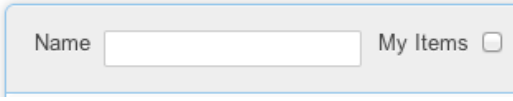
Much like global search, module search has the ability to use wildcards and automatically appends a wildcard character (%) to the end of your search phrase. For more information regarding using wildcards in module searches, please refer to the Wildcards section in this documentation.

## Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.
The buttons and checkboxes available in Basic Search panel have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Items : Select this box to return only records assigned to you.
- My Favorites : Select this box to return only records you have marked as favorites.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Items" and enter a record name, Sugar will only return records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentations in the Administration guide.




Administrators can configure what fields appear on the Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio

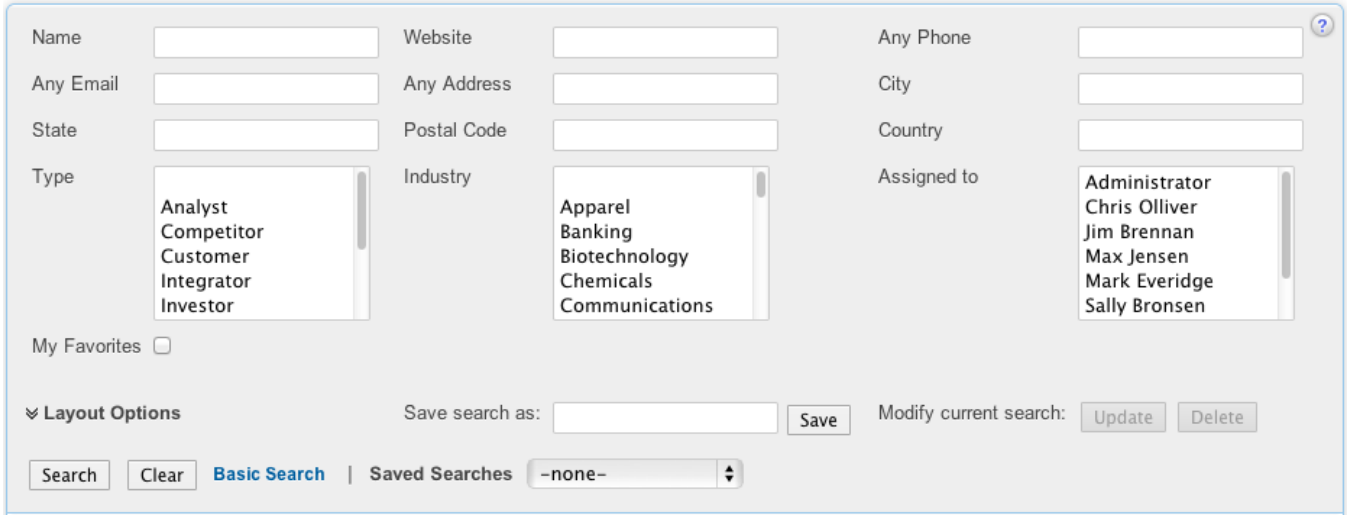
documentation in the Administration guide.

## Advanced Search

Advanced Search offers a more in-depth search experience than Basic Search including additional fields, layout options, and saved search capability. The search fields are context-sensitive and will vary depending on the module you are searching. From the Advanced search panel, you can click "Basic Search" for simplified searching.
The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

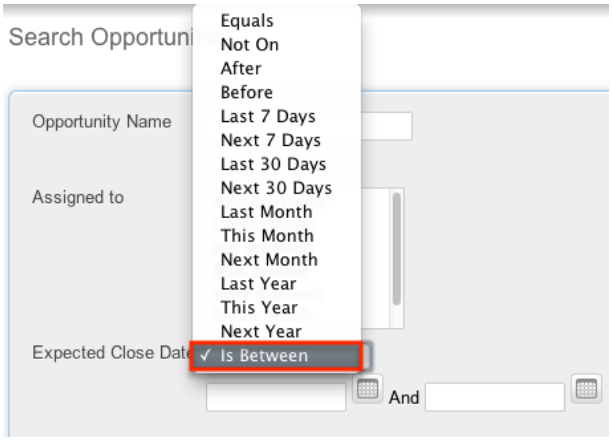
- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Favorites : Select this box to return only records you have marked as favorites.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the Layout Options section of this documentation.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section of this documentation.

Advanced search allows users to perform ranged searches on certain date or numeric fields. Ranged search fields include a dropdown to select the type of predefined search including the following options:

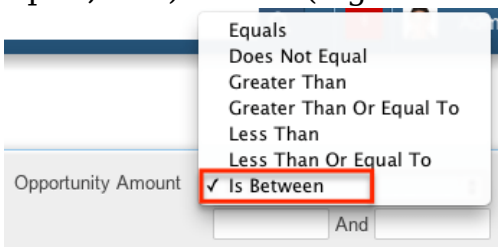



- Date Fields : Equals, Last 7 Days, Last Month, Is Between, etc.
  Depending on the option selected, there will be zero (e.g. Last 7 Days, Next 7

Days, etc.), one (e.g. Equals, Not On, etc.), or two (e.g. Is Between) input boxes to search on.




- Numeric Fields : Equals, Greater Than, Less Than, Is Between, etc. Depending on the option selected, there will be one (e.g. Equals, Ddoes Not Equal, etc.) or two (e.g. Is Between) input boxes to search on.




Fields can be enabled or disabled to allow range searches via Admin > Studio. For more information on how to enable or disable range searches on a field, please refer to the Studio documentation in the Administration guide.

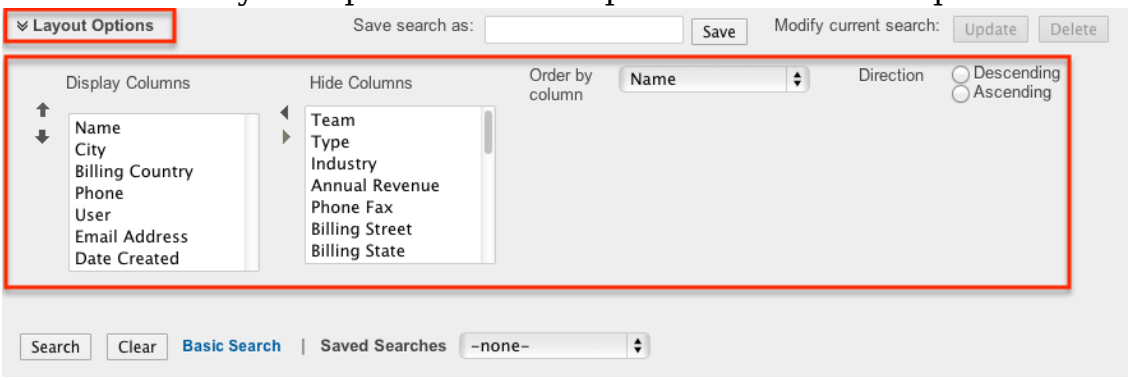
When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select "My Favorites" and enter in a record name to search, Sugar will only return records with a matching name that you have marked as favorites. When searching by a multiselect or dropdown field (e.g. "Assigned to"), however, Sugar will return records matching any of these selections. Once the search completes, the relevant results will populate in the list view below the search panel. To see all records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentations in the Administration guide.

Administrators can configure what fields appear on the Advanced Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

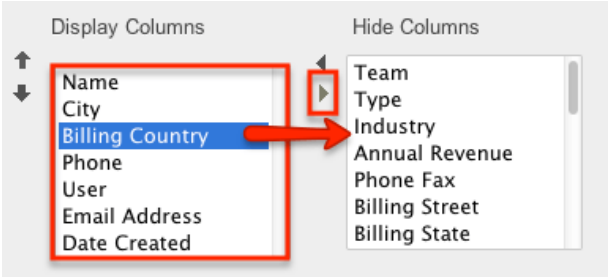
Layout Options

Sugar gives users the ability to personalize the list view of each module through the advanced search layout options feature. Users can pick which fields are displayed in the list view, the order they are displayed in, and which column the records are ordered by.
Use the following steps to personalize the list view for a module using the layout options from the advanced module search:

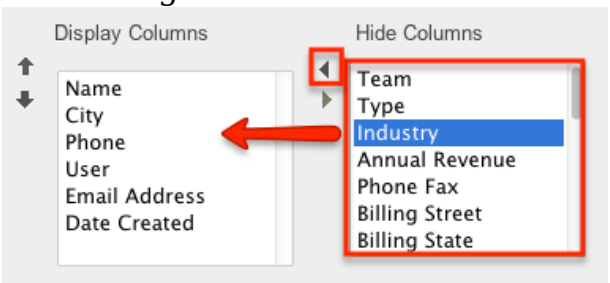
1. Click on the Layout Options link to expand the available options below.



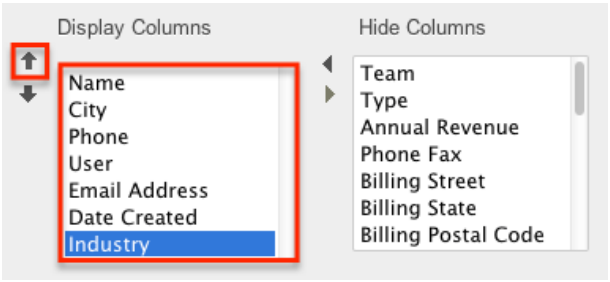

2. Select any column name in the Display Columns panel and click the right aligned arrow to remove the column from the list view.




3. Alternatively, select any column name in the Hide Columns panel and click the left aligned arrow to add a column to the list view.

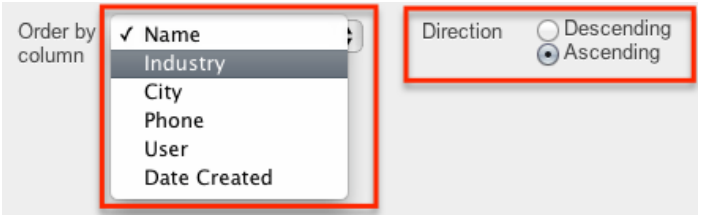



4. Select any column name in the Display Columns panel and click the up or down aligned arrow to move a column left or right respectively in the list view.

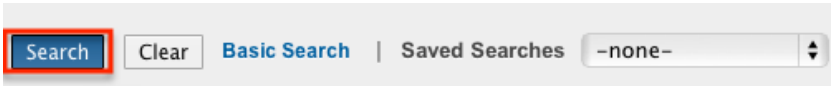



5. In the Order By column dropdown, select a field to order your results by. Only columns in the Display panel will be available to order by and some columns (e.g. Email Address) are not available for sorting.
6. Select a direction you wish to order the fields by: Ascending : 1-10, A-Z; Descending : 10 -1, Z-A

   Note: Clicking on a column header in the list view will temporarily override the sort selected here. In order to order by the selection made here again, simply click the Search button.




7. Click Search to execute the search.




Not all columns in each module can be used in the layout options by default. If there is a column you desire to add to your list view or order by, please contact your Sugar administrator to enable the desired fields. For more information on how to add or remove fields as options in the layout options section, please refer to the Studio documentation in the Administration guide.

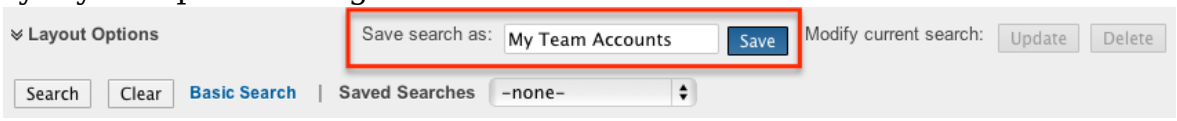
Note: The layout options configured here supersede the default list view settings configured in Studio for the specified module.
Sugar remembers the last search run when you return to each module including whether or not the Layout Options panel was exposed. After changing your layout options, click "Layout Options" again to hide the expanded panel and click Search. Running a search locks in place whatever options you currently have on the search screen. Now the next time you run a search, the new options will be remembered and the Layout Options will be hidden. Click the Clear and the Search buttons to revert back to the default layout options.

Saved Search

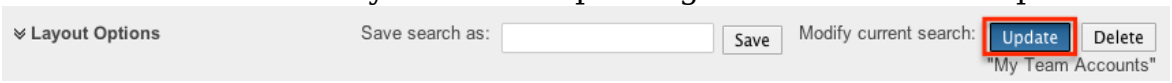
Sugar gives users the ability to save any layout option changes and search criteria for easy access to perform the same search at a later time. A common example of this would be a manager saving a search where only his or her employees are the Assigned Users on the record. This way, the manager can review all of their team's records at the click of a button. You can save an unlimited number of search results and the Saved Searches dropdown displays the last saved search at the top of the list.
Note: Saved searches are user specific and can not be seen or shared by other users.

Use the following steps to save a personalized search from the advanced module search:

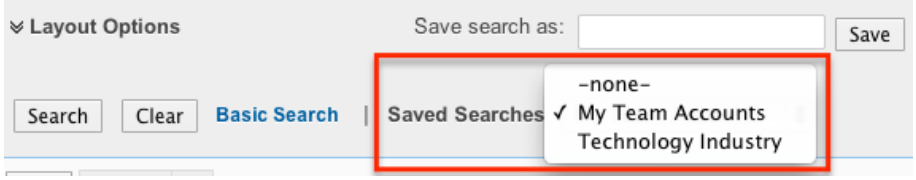
1. Enter in any number of search criteria you desire.
2. Enter in a name to designate the search into the "Save search as" textbox and click save.

   Note: Any layout option changes made will also be saved with the saved search. 


3. The search is saved and executed. You now have the ability to modify any search criteria or layout options. After any necessary modifications are made click the Update button next to "Modify current search".

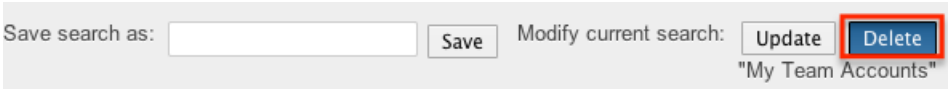
   Note: The name of the search you will be updating shows below the Update button. 


4. There is no way to modify the name of a saved search. Alternatively you can execute a saved search, enter a new name into the "Save search as" textbox and click save. This will create a new saved search with the same criteria as the original with the new name. You may then proceed to delete the old saved search.
5. To execute a previously saved search, simply select the desired search from the "Saved Searches" dropdown.


6. This immediately executes the saved search.
7. If you wish to remove a saved search, simply click the Delete button after executing a previously saved search.

Note: The name of the search you will be deleting shows below the Delete button.

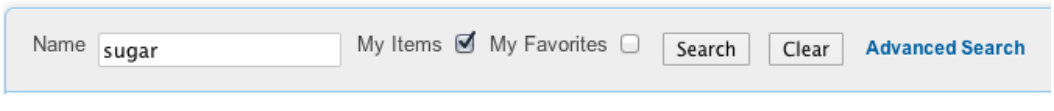


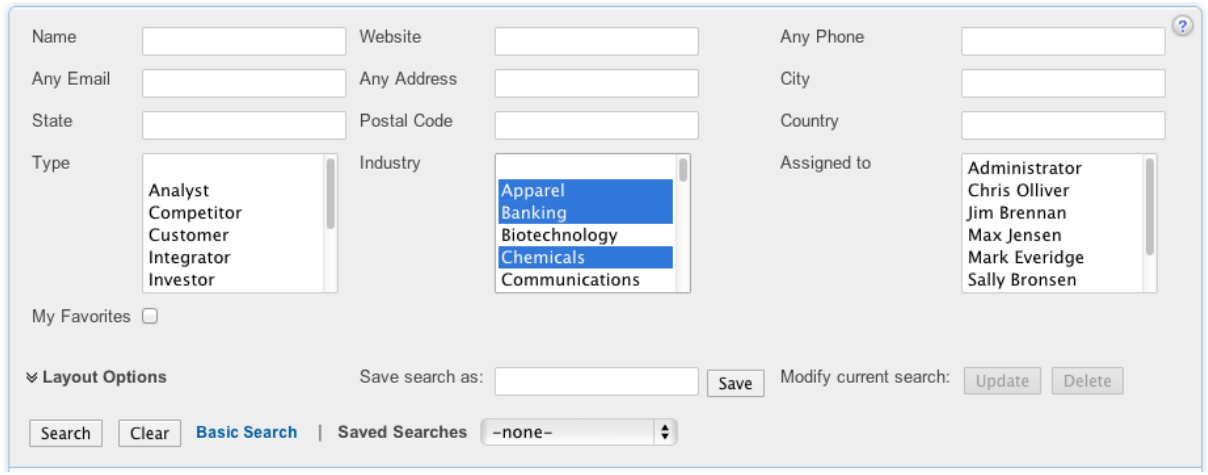

## AND vs OR

When searching in the Basic or Advanced module search, Sugar uses the "and" operator, not "or". This means that if you are searching against multiple fields, Sugar will place an "and" in between each search field returning only records matching all of your search criteria. For example: A search performed for a record name "sugar" and the "My Items" check box will only return records where the record name contains "sugar" and the assigned to field is the user currently logged in.

The only time Sugar will use the "or" operator is when using the mutiselect options in the search criteria. For example : A search performed in the Accounts module for the industry field will allow you to select multiple options to search by. Performing a search on the industry field with Apparel, Banking, and Chemicals selected will return any records where industry is "Apparel" or "Banking" or "Chemicals".

If any other field is added into the search criteria the operators between the industry field and any other field will remain an "and" operator.




## Wildcards

Wildcards can be used to search for criteria without including the entire word in the search. Use a wildcard character in place of characters you do not require in

your search. Use may use any number of wildcard characters in any combination you desire. Search operators can be combined for queries, but if quotation marks and wildcard characters are used together, the quotation marks will supersede the wildcard, resulting in a search for an exact match. The following wildcard characters can be used in the related module filters in Sugar:

| Character | Wildcard Use |
|---|---|
| % | Use this wildcard to match any number of characters, including zero |
| _ | Use this wildcard to match a single character |

Please note that a wildcard is implied at the end of all search queries. For example, searching for "Acme" will match account names like Acme Industries or Acme Funds. Insert a wildcard before your search query with a % sign (%Acme) to match account names that begin with or contain the query, such as "ABC Acme Industries". If performing a multiple word search, the wildcard is only appended to the last word and not all words.

The following are example searches using wildcards in related record search:

| Search Criteria | Matches | Does Not Match |
|---|---|---|
| rob | Rob, Robert, Robin | Bob, Jacob |
| %bert | Albert, Bert, Robert | Bart |
| r_b | Robert, Ruby | Bob, Raab |
| %s_i | Dustin, Christi, Smith | Sophie, Josephine |
| __it | Nita, Littrell | Schmitt |
| r_b% smit% | Robert Smith, RobSmite | Bob Smith, Robert Phillip |
| rob smit | Rob Smith, Rob Smite | John Smith |

When performing a search, Sugar will try to match your search text to the beginning of a record's field. Therefore, if an account name starts with an article like "A" or "The", this must be accounted for in the search by adding a wildcard (%) at the beginning of your text. For example, to properly return an account named "The ABC Company", you should enter "%abc" for Sugar to find a match in the system.

## Search Memory

Sugar by default automatically saves your most recent search criteria when leaving the module then repopulates the search fields the next time you return. For example: Perform a search in the Accounts module for "sugar". Navigate away from the Accounts module and then return back to the Accounts module. The

search for "sugar" will automatically be shown and the relevant results will be shown below in the list view.

Note : This can be an unintended result if a user is unaware of this functionality. For example: A search may have an assigned user selected that is not currently visible in the scrolling selection box. When running a new search, best practice is to click the Clear button before entering your search criteria.

Module search memory can be set to one of the following options:

- Remember last search : This is the default behavior in Sugar
- Populate only : This will populate the search criteria, but will not execute the search.
  Note : This is recommended for systems experiencing performance issues.
- Do not remember last search : Search will be cleared and executed every time the search is loaded

Note: These options are global settings and will affect all users. Please be sure to inform users of any behavior change before making modifications.

### Admin Configuration

A Sugar administrator has many options for configuring module search. You have the ability to add, remove, and order fields on either the basic or advanced search layouts through Admin > Studio. For more information on how to change the basic and advanced search layouts, please refer to the Studio documentation in the Administration guide.

The module search results are controlled through the list view layout in Admin > Studio. Here you can also control the possible fields a user can add to their personalized list view. For more information on how to change the list view layout, please refer to the Studio documentation in the Administration guide.

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# Home

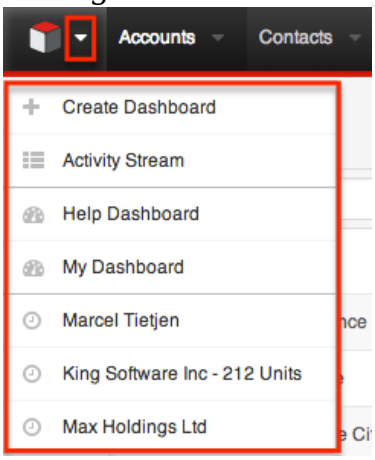
## Overview

Sugar's Home page houses the dashboard and activity stream which allows users to view pertinent record information via various dashlets and activity stream posts.

Every user in Sugar can configure their dashlets based on the display options and filters available from their dashboard. Users can also personalize their activity stream to only view posts specific to records that are important to them. This documentation will go over the basics of the Home page as well as the various options available to customize the Home page to best fit your individual needs.

## Home Module Tab

The Home module tab (Sugar cube icon) is the first tab on the navigation bar at the top of any Sugar screen. Users can click this tab to easily navigate back to their Home page as they are working in Sugar. You may also click the triangle next to the Sugar cube icon to access the activity stream, dashboards (e.g. "My Dashboard"), create new dashboards, as well as view the 10 most recently viewed records across all modules. A user's dashboards (e.g. My Favorites Dashboard) will also appear in the list with a display limit of 20 dashboards. For more information on creating dashboards, please refer to the Creating Dashboards section of the Intelligence Pane documentation.




## Dashboards

Sugar's Home page dashboard is where certain dashlets are grouped together based on the information that users would like to view. By default, the "Help Dashboard" and "My Dashboard"comes out-of-the-box with Sugar to display on the Home page. Users have the option to modify the dashboard layout, rename dashboards, delete dashboards, as well as create new dashboards on their Home page if they wish.

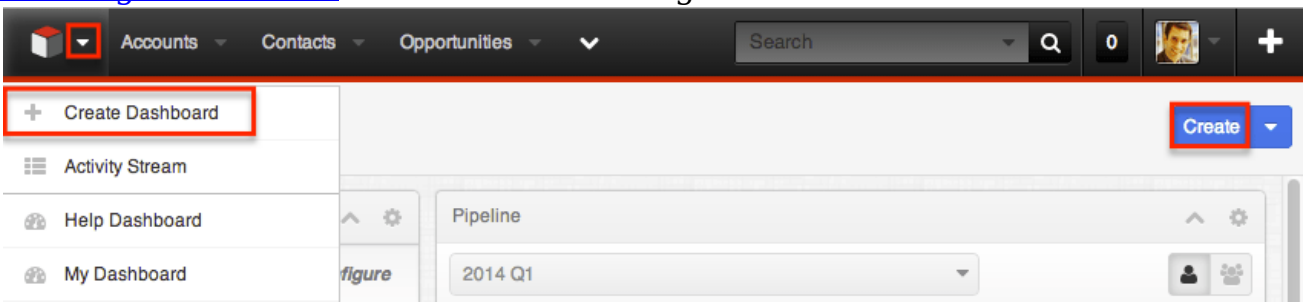
The Help Dashboard on the Home page provides a brief introduction with information regarding the Help dashlets which are available to view in modules using the Sidecar user interface (e.g. Accounts, Contacts, etc.). A link to the corresponding documentation (Home documentation) in the Application guide is also available in the Help dashlet for users to reference for more information. In

addition, you can access the Sugar University, Documentation & Support, and Community Forums websites. These links provide access to additional resources available to users. Simply click the appropriate link from the Help dashlet and the pages will open in a separate tab. Users can access the Help Dashboard on the Home page by clicking the triangle next to the Sugar cube icon and selecting "Help Dashboard" or clicking the Help icon in Sugar's footer. Please note that the Help Dashboard cannot be configured or deleted from the Home page. For more information regarding the Help dashboard and Help dashlet, please refer to the Intelligence Pane documentation.

Instances that are upgraded from Sugar 6 to Sugar 7.2 or greater will have their legacy dashboards migrated over. Users will be able to view these by selecting "My Legacy Dashboard" from the Sugar cube icon. For more information regarding the legacy dashboard, please refer to the My Legacy Dashboard section of this documentation.

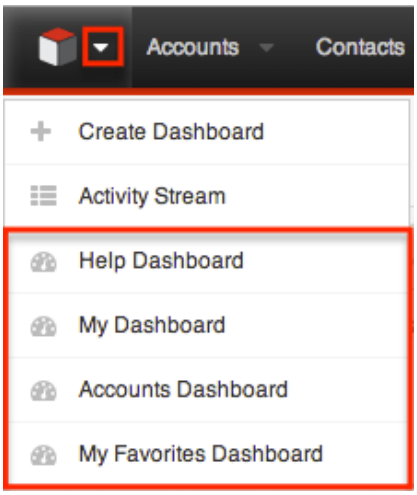
## Creating Dashboards

Users can create new dashboards on their Home page if they wish to group a different set of dashlets together outside of the default dashboard (e.g. "My Dashboard"). This will allow you to quickly and easily view the information you need in one place via the specific dashlets grouped under each dashboard. There are two ways you can create dashboards on your Home page. You can either click the triangle next to the Sugar cube icon on the upper left of the screen then select "Create Dashboard" or click the Create button on the upper right of your current dashboard. For more information on creating dashboards, please refer to the Creating Dashboards section of the Intelligence Pane documentation.



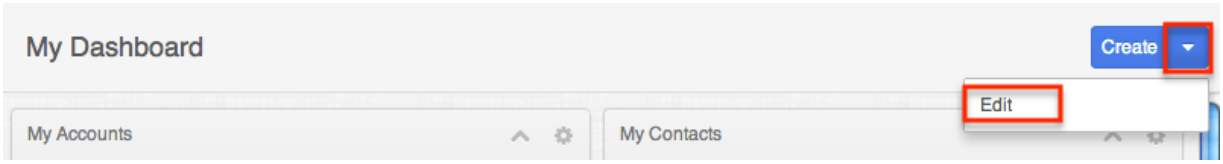

## Switching Between Dashboards

Multiple dashboards can be created on the Home page to house various dashlets per the user's viewing preference. For more information on creating new dashboards, please refer to the Creating Dashboards section of the Intelligence Pane documentation. Once a dashboard is created, users can easily access them by clicking the triangle next to the Sugar cube icon on the upper left of the screen then selecting the specific dashboard's name.




## Renaming Dashboards

Users can change their existing dashboards to display different names if they wish by clicking the triangle next to the Create button then selecting "Edit". Once the dashboards edit layout opens, you can enter in the new name in the open text box on the upper left of the page then click "Save" to preserve the change. For more information on renaming dashboards, please refer to the Renaming Dashboards section of the Intelligence Pane documentation.

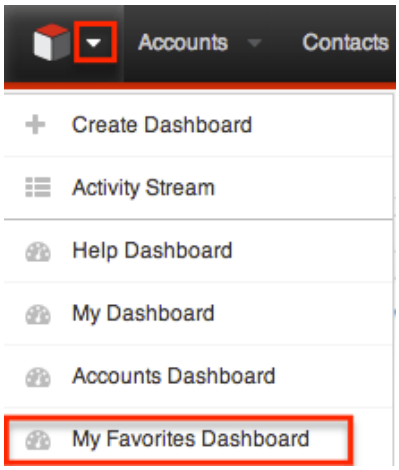



## Changing Dashboard Layouts

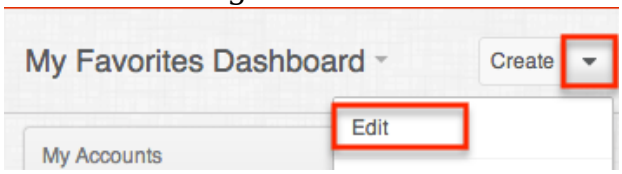
Users can change the number of columns that dashlets are displayed on the dashboard depending on how they wish to view the information. You can set the dashboard to display one column at a time or up to three at once.

The following steps cover changing the My Favorites Dashboard to display two columns as an example:

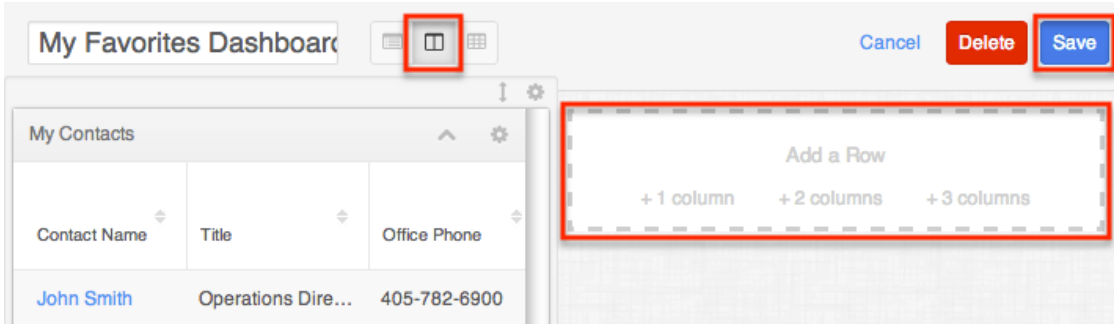
1. Click the triangle next to the Sugar cube icon then select the specific dashboard you wish to change the layout.



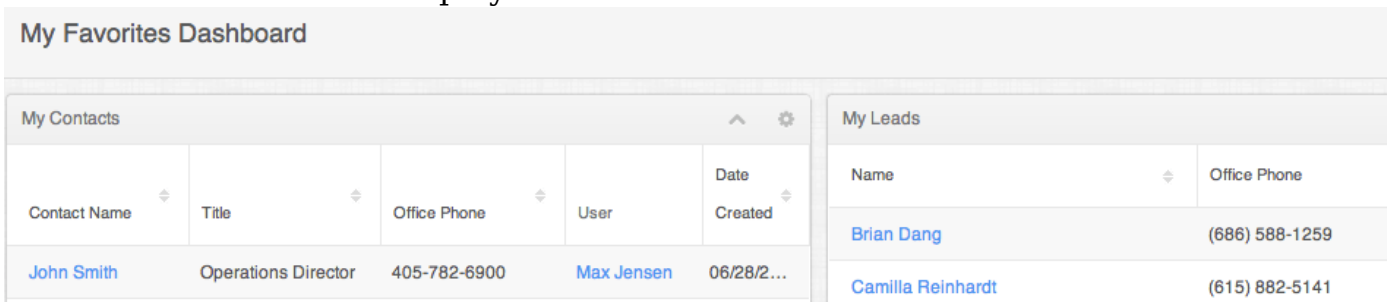

2. Click the triangle next to the Create button then select "Edit".




3. Select the two column layout icon on the upper left of the dashboard.
    - The second column will open up to the right of the existing column allowing users to add a new dashlet or move an existing one into it. For more information on adding dashlets, please refer to the Adding Dashlets section of the Intelligence Pane documentation.




4. Click "Save" once the appropriate changes have been made to the dashboard.
5. The dashboard will now display the dashlets across two columns.




## Deleting Dashboard Rows

Users can also delete specific dashboard rows, which will remove all dashlets in the row they no longer wish to view. For more information on deleting dashboard

rows, please refer to the Deleting Dashboard Rows section of the Intelligence Pane documentation. Please note that deleted dashlets are not permanently removed and can be added back by editing the dashboard. For more information on adding dashlets to your dashboard, please refer to the Adding Dashlets section of the Intelligence Pane documentation.

### Deleting Dashboards

Users can easily delete dashboards they no longer wish to view on their Home page by editing the specific dashboard then clicking the Delete button. For more information on deleting dashboards, please refer to the Deleting Dashboards section of the Intelligence Pane documentation. Please note that the dashlets housed within the dashboard(s) are not permanently removed and can be added to other new and existing dashboards as desired. For more information on adding dashlets to dashboards, please refer to the Adding Dashlets section of the Intelligence Pane documentation.

## Dashlets

Dashlets reside within the dashboard and provides users with valuable information regarding record's for their organization. By default, there are stock dashlets that come out-of-the-box with Sugar and users can easily add them to various dashboards per their viewing preference. Please note that each dashlet can be configured to display the necessary information you wish to view. For more information on configuring the dashlet, please refer to the Editing Dashlets section of the Intelligence Pane documentation.

### Commonly Used Dashlets

By default, the "My Dashboard" will display on your Home page and include stock dashlets such as "My Contacts", "Pipeline", etc. Users have the option to add various types of dashlets to each dashboard to view information that is of importance to them. For more information on adding dashlets, please refer to the section of the Intelligence Pane documentation. The following sections will go over some commonly used dashlets that can be viewed, added, and managed on your Home page.

#### Learning Resources Dashlet

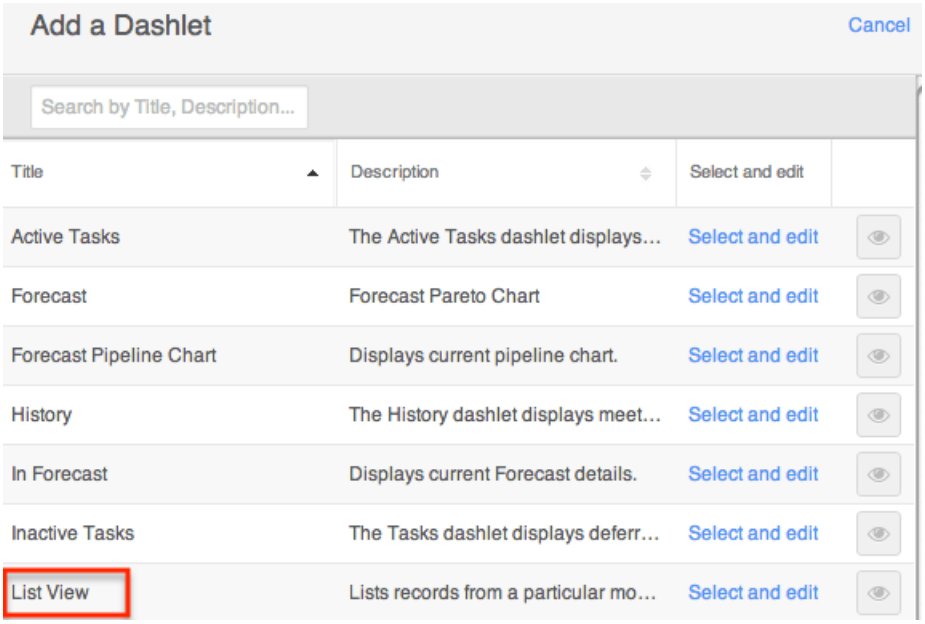
The Learning Resources dashlet allows users to access various resources available to learn more about the product, get training, and collaborate with other users.

The dashlet includes links to Sugar University, Community Forums, and Documentation & Support, and you can simply click the appropriate link to be directed to the specific page. You can remove the dashlet from the Home page if you wish by clicking the Gear icon on the upper right of the dashlet and selecting "Remove". Please note that the dashlet can be added back to the Home page again by editing the dashboard. For more information on adding dashlets, please refer to the Adding Dashlets section of the Intelligence Pane documentation.

List View Dashlet

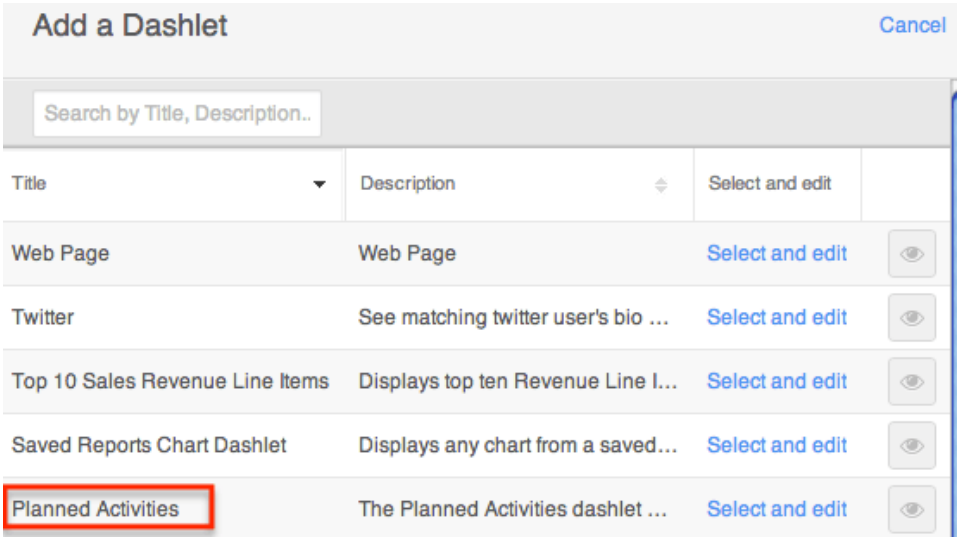
The List View dashlet enables users to view a list of records for a specific module (e.g. Accounts, Contacts, Leads, etc.) in Sugar. When configuring the dashlet, simply select the primary module (e.g. Accounts, Contacts, Leads, etc.) you wish to view a list of records for on your Home page. Once added, you can configure the dashlet by clicking the Gear icon on the upper right if you wish to change the filters, etc. For more information on viewing the List View dashlet, please refer to the List View Dashlet section of the Intelligence Pane documentation. Please note that any changes made by the administrator to the List View layout in Studio affects the list of available fields in the module's list view dashlet layout. The deployed changes will not display automatically in the corresponding module dashlet and users will need to edit the dashlet in order to view the changes in the Columns field , add new fields to the layout, etc. For more information on editing the List View layout in Studio, please refer to the Studio documentation in the Administration guide.

Multiple List View dashlets can be added to the Home page if you wish to view the list of records for various modules. For more information on adding dashlets, please refer to the Adding Dashlets section of the Intelligence Pane documentation. Please note that the dashlet title (e.g. My Accounts, My Contacts, etc.) will vary based on the primary module selected when setting up the dashlet . You can also view and add the List View dashlet to each module's intelligence pane. For more information on viewing and configuring dashlets on the intelligence pane, please refer to the Dashlets section of the Intelligence Pane documentation




Planned Activities Dashlet

The Planned Activities dashlet provides users with a list of open or upcoming calls and meetings that are assigned to them. The activity types are broken up into two tabs (Meetings, Calls) and displays a number on each tab to indicate the relevant count of planned activity records. You can filter the dashlet to view either the current day's scheduled activities or upcoming activities in the future by toggling between the Today or Future button. In addition, there are two buttons to the right which allow you to toggle between viewing the record's scheduled activities assigned to you and activities assigned to users on your team. Please note that you can use both sets of buttons (Today, Future, one person, multi-group) concurrently to further filter and view the information you need. For example, you can click the one person button plus the Future button if you wish to view all upcoming activities specifically assigned to you for the current record. The Planned Activities dashlet is also available to view via the module's intelligence pane. For more information on viewing, configuring, and creating activities via the dashlet, please refer to the Planned Activities Dashlet section of the Intelligence Pane documentation.




Active Tasks Dashlet

The Active Tasks dashlet allows users to view outstanding tasks that require attention and need to be completed on a future or current date. The dashlet is broken up into three tabs, "Due Now", "Upcoming", "To Do", and displays a number on each tab to indicate the relevant count of open tasks falling into each due date range. To view tasks that are due on the current date, simply click the Due Now tab and any tasks that are currently due will be listed. Please note that any open tasks where the due date is prior to the current date will also display under this tab with an Overdue status in red. The Upcoming tab displays all assigned tasks that have a due date in the future. The To Do tab will display tasks that have no due date set. If a task only has a start date defined but no due date, then it will appear under the To Do tab. You can also close tasks as completed directly from the dashlet by clicking the Completed button to the right of the task's row.



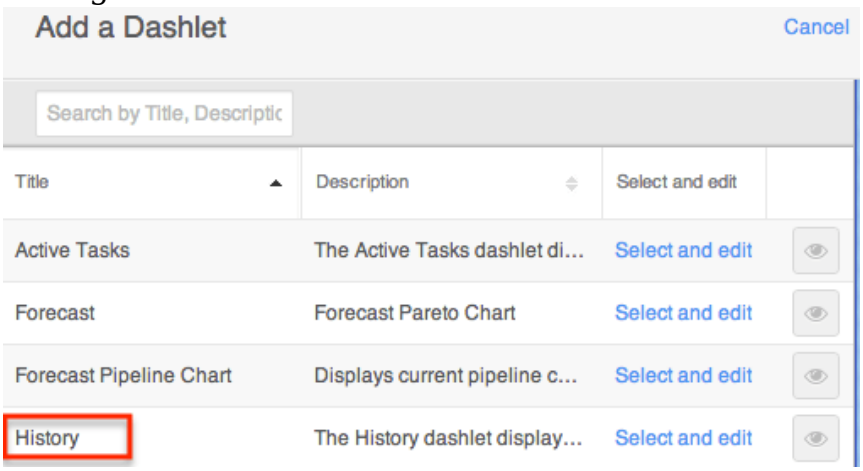

There are two buttons on the upper right of the dashlet which allow you to toggle between viewing tasks assigned to you and tasks assigned to users on your team. You can click the one person button to quickly view task records for which you are

the owner. To view task records assigned to all users on your team, simply click the group button to the right of the one person button. Please note that the Active Tasks dashlet is also available to view via various modules' (e.g. Accounts) intelligence panes. For more information on viewing, configuring, and creating tasks via the dashlet, please refer to the Active Tasks Dashlet section of the Intelligence Pane documentation

## History Dashlet

The History dashlet allows users to view a history of record's related activities (e.g. calls, meetings, emails) that have already taken place. The activity types are broken up into three tabs (Meetings, Emails, Calls) and displays a number on each tab to indicate the relevant count of historical activity records. You can also filter (Last 7 Days, Last 30 Days, Last Quarter) the History dashlet to only display a specific subset of the activities meeting the set time frame. Clicking the Plus icon on the upper right of the dashlet displays the Archive Email option which allows users to manually enter emails for historical purposes and create implicit relationships to records. Simply enter in the required information (e.g. Date Sent, From, Subject, etc.) along with the email body in the Compose Email window then click "Archive" to save the email record.

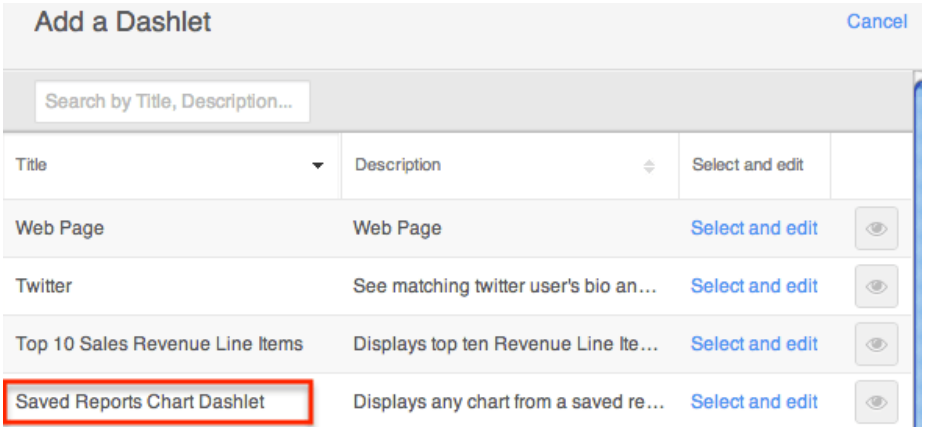
There are two buttons on the upper right of the dashlet which allow you to toggle between viewing the record's activities assigned to you and activities assigned to users on your team. You can click the one person button to quickly view the record's calls, meetings, and emails for which you are the owner. To view the record's activities for all users on your team, simply click the multi-group button to the right of the one person button. The History dashlet is also available to view via the module's intelligence pane. For more information on viewing, configuring, and creating activities via the dashlet, please refer to the History Dashlet section of the Intelligence Pane documentation.




## Saved Reports Chart Dashlet

The Saved Reports Chart dashlet allows you to view pre-defined report charts as well as charts of your saved reports. There are 17 pre-defined report charts that are available to select in the Saved Reports Chart dashlet. These pre-defined charts allow you to view information such as leads by lead source, calls by team by user, opportunities by lead source, etc. You also have the option to add custom report charts as dashlets by selecting the saved report when configuring the dashlet to add to your Home page. For more information on how to view report charts via dashlets, please refer to the Viewing Via Dashlets section of the Reports documentation. Please note that all report types (Summation Report, Matrix Report, Summation with Details Report) except for Rows and Columns-type reports have the chart option available to view as dashlets .

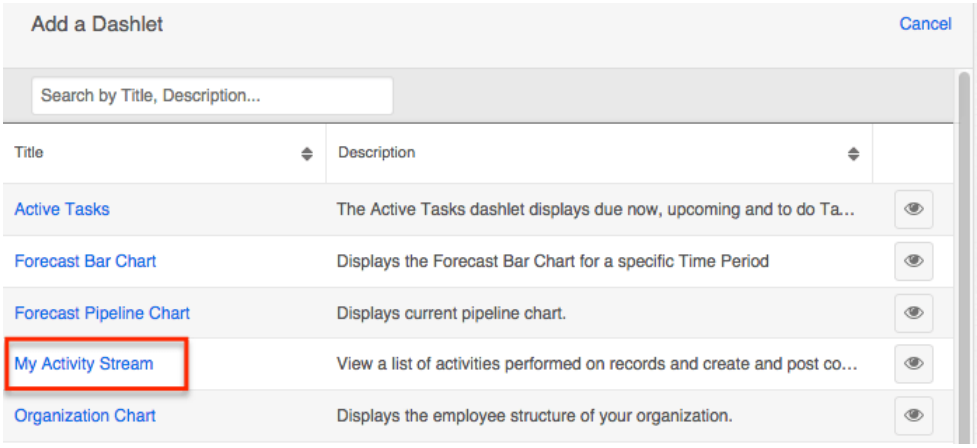
You can also add and view report charts via the Intelligence Pane dashboard. For more information on adding, viewing, and configuring the Saved Reports Chart dashlet, please refer to the Saved Reports Chart Dashlet section of the Intelligence Pane documentation.




My Activity Stream Dashlet

The My Activity Stream dashlet displays the user's main Activity Stream within a dashboard, eliminating the need to navigate to the Activity Streams view to monitor the most recent stream activities. As with other dashlets, you can display the most recent 5, 10, 15, or 20 stream items and specify an auto-refresh interval if desired. In addition, the standard Activity Stream filters can be enabled by editing the dashlet. For more information on configuring the dashlet, please refer to the Editing Dashlets section of the Intelligence Pane documentation.

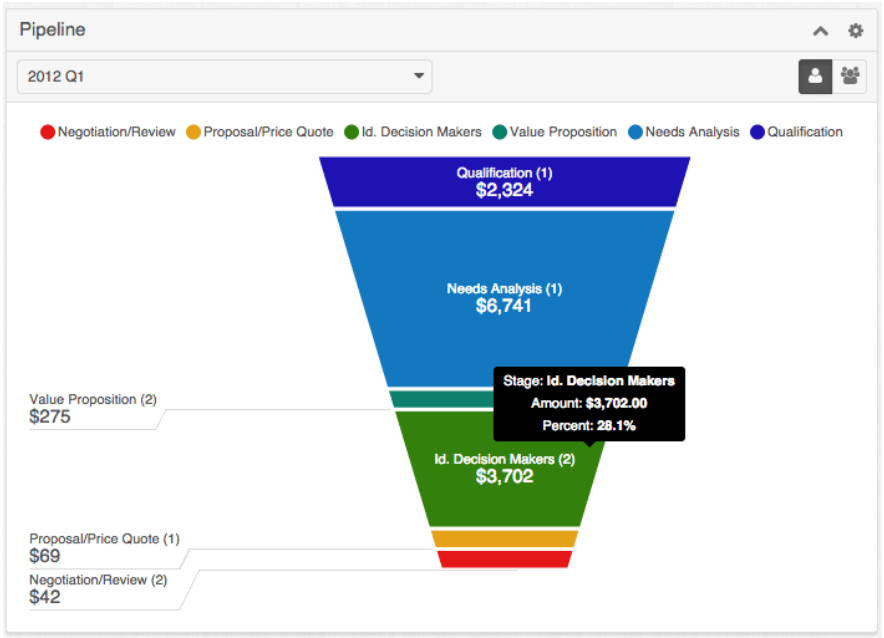
Like other Activity Stream views, the dashlet supports inline commenting on specific stream activities, but it does not allow record previews. For more information on Activity Streams, please refer to the Activity Streams documentation.




You can also add the My Activity Stream dashlet to the Intelligence Pane dashboard. For more information on adding, viewing, and configuring the My Activity Stream dashlet, please refer to the Intelligence Pane documentation.

## Forecast Pipeline Chart

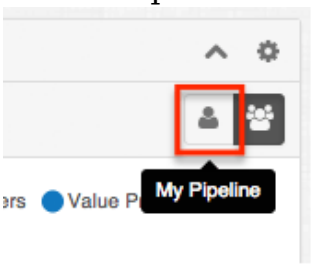
The Forecast Pipeline Chart dashlet illustrates the flow of open sales opportunities through the various sales stages by displaying the total dollar amounts for open records grouped by sales stage. The top of the sales funnel is the widest point and represents sales deals that are still in the earliest stage of "Qualification". The funnel narrows as unqualified prospects fall away and opportunities with higher win potential approach final sale.

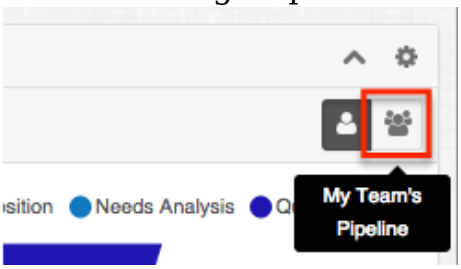



Note: The Forecast Pipeline chart assumes that the sales stages are being used as defined in the out-of-the-box Sales Stage dropdown list. While the dashlet will display custom Sales Stage field values, the out-of-the-box Closed Won and Closed

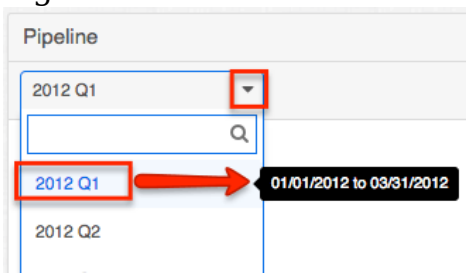
Lost field values must be preserved in order for Sugar's Forecast Pipeline Chart to properly identify open vs. closed business. Any custom stages added to the Sales Stage dropdown by your organization will be displayed at the top of the funnel, regardless of how the stages are sorted within the dropdown.

Users can customize the Forecast Pipeline Chart to monitor the overall health of their personal funnel or that of their entire team over various time periods. After adding this dashlet to the homepage, toggle between "My Pipeline" and "My Team's Pipeline" using the individual and group icons in the corner of the dashlet.

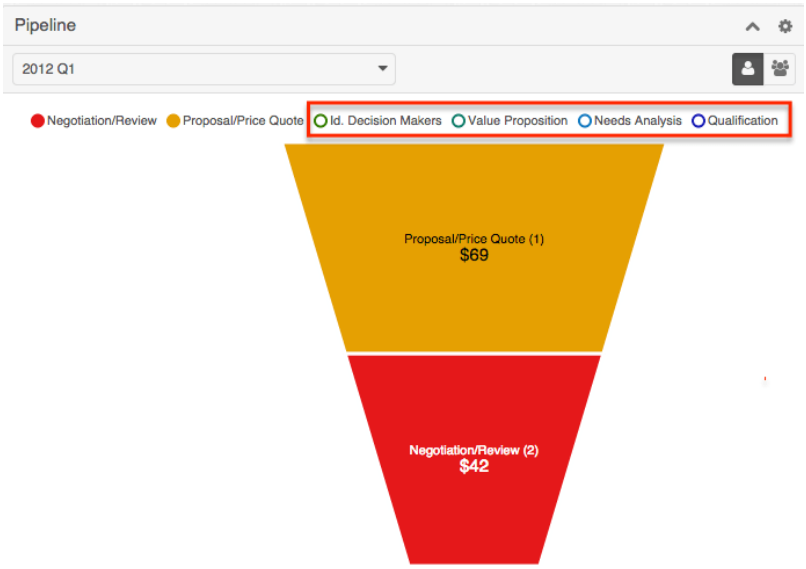



The pipeline can also be filtered by time periods that have been configured by the administrator in the Forecasts module by clicking on the time period dropdown. The chart will display only records with an expected close date within the specified date range. Hover over the time periods to see the dates that the time periods begin and end.




To further customize the dashlet, users can click on individual sales stage labels to add and remove those stages from the funnel view. In the example pictured below, only the Proposal/Price Quote and Negotiation/Review sales stages are enabled and therefore appear in the legend with solid dots. Sales stages that have been disabled will appear in the legend as empty circles.

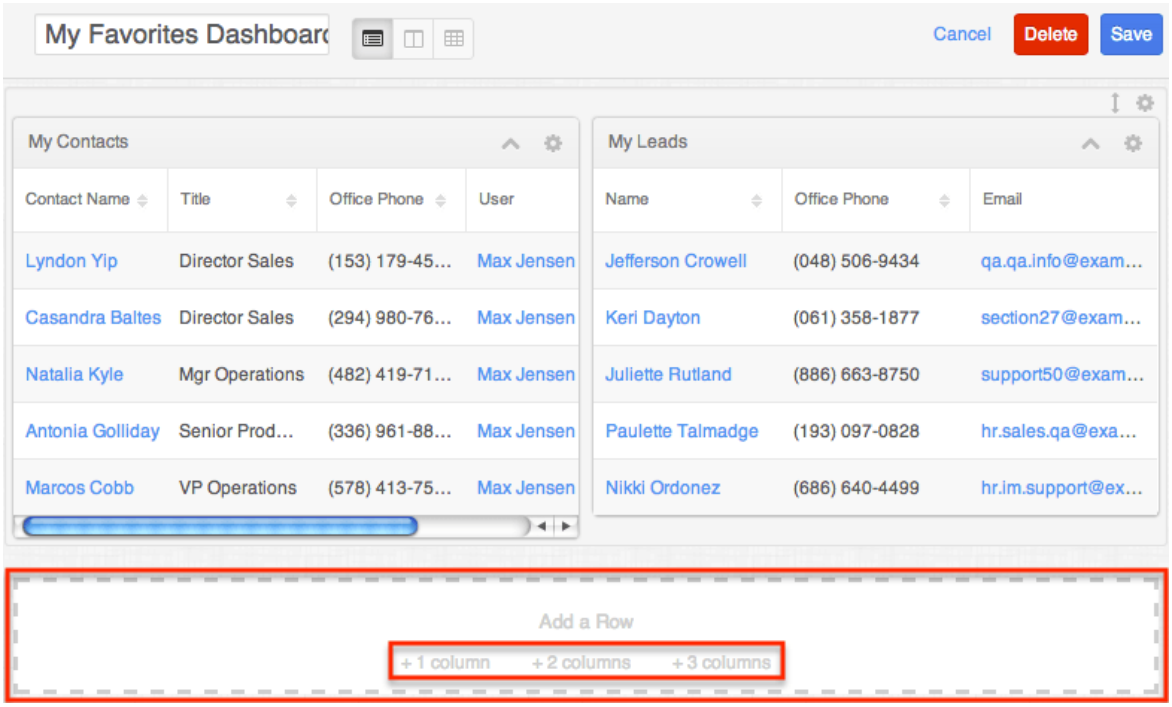



For more detailed information on forecasting, please refer to the Forecasts documentation.

## Adding Dashlets

Additional dashlets can be added by clicking the triangle next to the Create button on the upper right of the dashboard then selecting "Edit". The dashboards edit layout will display open Add a Row boxes where you can add new dashlets. For each row you add, you will also have the option to select columns (+1 column, +2 columns, +3 columns) based on the number of dashlets you wish to display per row. You can select and add from the list of available dashlets (e.g. My Accounts, Sales by Country, etc.) to the specific column on the dashboard row. For more information on adding dashlets to dashboards, please refer to the Adding Dashlets

Please note that you can add the same dashlet multiple times in the dashboard with different configurations to show different records or information.



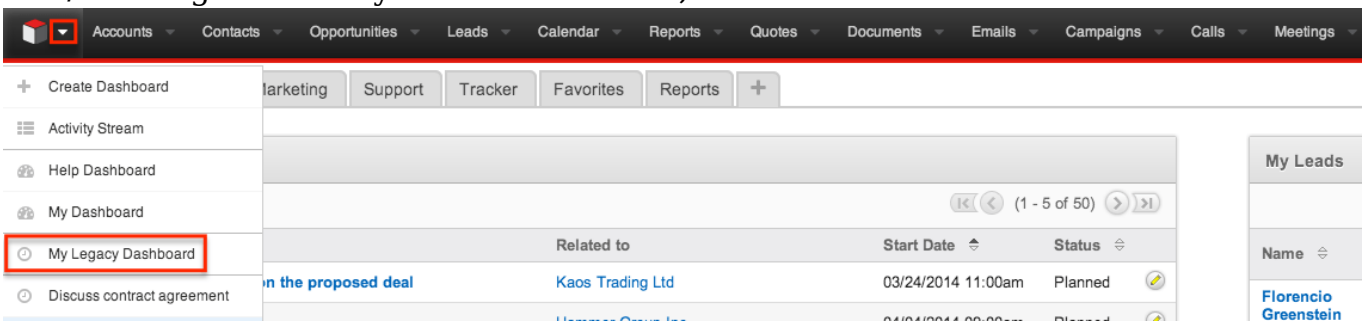

## Working With Dashlets

There are various options available when working with dashlets on your Home page including editing dashlets, rearranging dashlets, refreshing dashlets, deleting dashlets, etc. Dashlets on the Home page can easily be configured to display specific information users want to view. Simply click the Gear icon at the top of the dashlet menu bar then select "Edit", which will display the Edit Options page to configure the dashlet per your viewing preference. Users also have the option to rearrange dashlets to place them in different positions on their dashboard. You can easily swap positions between two dashlets by dragging and dropping the dashlets across your dashboard. Please keep in mind that dashlets in Sugar also need to be refreshed in order to view any updated data and there are various options available for users to refresh. In addition, you can also delete dashlets you no longer wish to view on your dashboard by clicking the Gear icon at the top of the dashlet menu bar then selecting "Remove". Please note that deleted dashlets are not permanently removed and can be added back by editing the dashboard. For more information on editing, rearranging, refreshing, and deleting your dashlets, please refer to the Intelligence Pane documentation.

## My Legacy Dashboard

The users existing dashboard in 6.x will be migrated over to 7.x upon upgrade and can be viewed via the My Legacy Dashboard on the Home page. The My Legacy Dashboard enables users to view information from their existing 6.x dashlets and allows them to similarly configure dashlets (e.g. My Accounts, My Calls, etc.) that

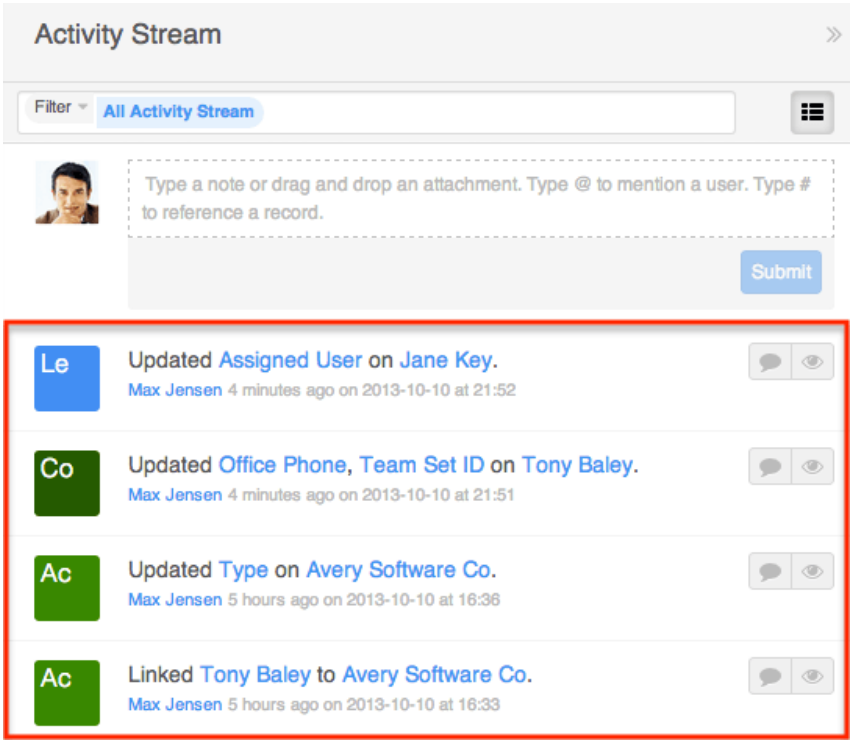
are supported for 7.x in the new dashboard (e.g. My Dashboard). The overall layout of the legacy dashboard will be the same as it was in 6.x, but dashlets such as My Activity Stream, My Project Tasks, and any forecast-specific dashlets will not appear as they are not compatible with 7.x. Please note that the My Activity Stream dashlet does not appear upon upgrade as it is replaced with the new activity stream view on the 7.x Home page. For more information on viewing and managing the activity stream, please refer to the Activity Streams documentation. The legacy dashlets will migrate over with the same configurations applied and will function in similar fashion. For example, you can close meetings from the My Meetings dashlet by clicking the Close icon, click the Pencil icon next to records in the dashlet to edit via the module's record view/detail view, create new calls/meetings in the My Calendar dashlet, etc.




Simply click the triangle next to the Sugar cube icon and select "My Legacy Dashboard" to view and access your 6.x dashboard. Please note that you will not be able to configure (e.g. change layout, add tabs, add dashlets, etc.) the legacy dashboard, but will be able to modify the existing dashlets by clicking the Edit icon at the top of the dashlet menu bar. This will display the pop-up Options box with various options (e.g. Title, Display Rows, etc.) and filters (e.g. Only My Items, Assigned to, etc.) to make any necessary changes. Unlike 6.x, administrators will not be able to configure the Filters options or the dashlet list view display columns via Admin > Studio as the Sugar Dashlet layout in Studio is not available.

## Activity Stream

Sugar's activity stream allows users to view a list of activities performed on records, create posts, preview posts, comment on posts, etc. Users can easily track the most recent updates across their entire organization via the record and user posts on the Home page activity stream. You can also personalize the activity stream by specifying which records' posts you wish to view on the activity stream. Please note that the modules currently enabled to generate record posts for the activity stream are Accounts, Contacts, Leads, Opportunities, Revenue Line Items, Bugs, and Cases. For more information on viewing posts, creating posts, etc. via the activity stream, please refer to the Activity Streams documentation.




Last Modified: 02/13/2017 11:22am

# Leads

## Overview

Sugar's Leads module consists of individual prospects who may be interested in a product or service your organization provides. Once the lead is qualified as a sales opportunity, leads can be converted into contacts, opportunities, and accounts. There are various ways you can create leads in Sugar such as via the Leads module, duplication, importing leads, etc. Once the lead record is created, you can view and edit information pertaining to the lead via the Leads record view. This documentation covers the basics of the Leads module as well as the various options available when performing the actions related to the module.

## Lead Fields

The Leads module contains a number of stock fields that come out of the box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged to best meet your organization's needs. Users with administrator or developer access have the ability to alter, remove, or add fields via Admin > Studio. For more information on adding or modifying fields, please refer to the

Studio documentation in the Administration guide.

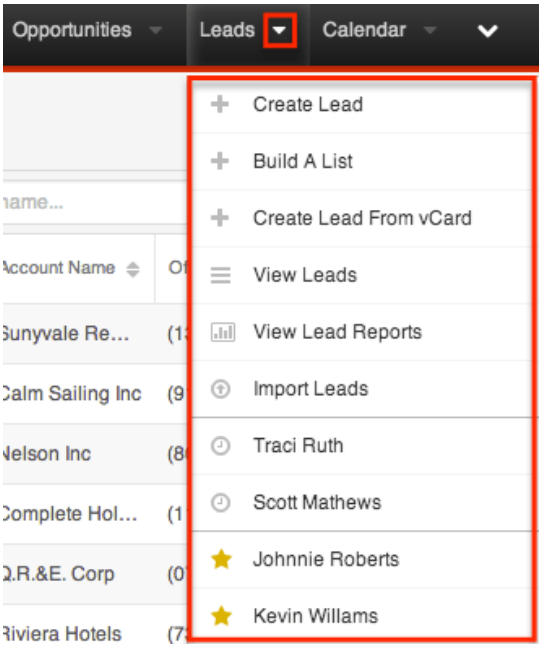
| Field | Description |
|---|---|
| Account Description | A description or other information about the lead account |
| Account Name | The account to which the lead belongs<br><br>Note: Unlike the Contacts module, the Account Name field is not a relate field in the Leads module. When you convert the lead, you will have the option to create the account as a related record. |
| Alternate Address | The lead's alternate address (e.g. billing, shipping) |
| Assigned to | The Sugar user assigned to the lead |
| Assistant | The name of the lead's assistant within his or her company |
| Assistant Phone | The assistant's phone number |
| Avatar | The lead's profile image |
| Birthdate | The lead's date of birth |
| Campaign | The campaign, if any, from which the lead originated |
| Converted | Indication that the lead has been converted to a contact |
| Date Created | The date the lead record was created |
| Date Modified | The date the lead record was last modified |
| Department | The lead's department within their company |
| Description | A description or other information about the lead |
| Do Not Call | Indication that the lead should not be called |
| Email Address | The lead's email address |
| Facebook Account | The lead's Facebook account information |
| Fax | The lead's fax number |
| First Name | The lead's first name |

| | |
|---|---|
| Google Plus ID | The lead's Google Plus ID |
| Home Phone | The lead's residence number |
| Language Preference | The lead's preferred language when accessing Sugar Portal |
| Last Name | The lead's last name |
| Lead Source | The source from which this lead originated |
| Lead Source Description | A description or other information about the lead source |
| Mobile | The lead's mobile number |
| Name | When viewing, the lead's full name |
| Office Phone | The lead's office number |
| Opportunity Amount | The expected opportunity amount for the potential business with the lead |
| Opportunity Name | The opportunity name associated with the lead |
| Other Phone | The lead's alternate phone number |
| Primary Address | The lead's primary address |
| Referred By | The name of the individual or organization that referred the lead |
| Salutation | Standard greeting for the lead (e.g. Mr., Ms., Mrs., etc.) |
| Status | The current status of the lead |
| Status Description | A description or other information about the lead's status |
| Teams | The Sugar team(s) assigned to the lead record |
| Title | The lead's business title |
| Twitter Account | The lead's Twitter account information |
| Website | The website URL associated with the lead's organization |

## Leads Module Tab

The Leads module tab is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access the Leads list view. You may also click the triangle in the Leads tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the

module. The Recently Viewed menu displays the list of leads you last viewed in the module. The Favorites menu displays the list of leads you most recently marked as favorites in the module.




The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|---|---|
| Create Lead | Opens the record view layout to create a new lead |
| Build A List | Opens the D&B Build A List Page to create a list of individuals for import based on various search filter criteria<br><br>Note: D&B connector must be enabled via Admin > Connectors in order to utilize the Build A List page. |
| Create Lead From vCard | Imports a vCard file from your computer to create a new lead |
| View Leads | Opens the list view layout to search and display leads |
| View Lead Reports | Displays existing reports based on the Leads module |
| Import Leads | Opens the Import Wizard to create or update leads using external data |

If you do not see the Leads module tab in Sugar, please check the following:

- The Leads module may be marked as hidden in your user preferences which prevents the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Leads module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Leads module for your entire Sugar instance. Reach out to your Sugar administrator to have the Leads module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

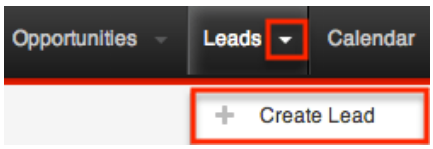
## Creating Leads

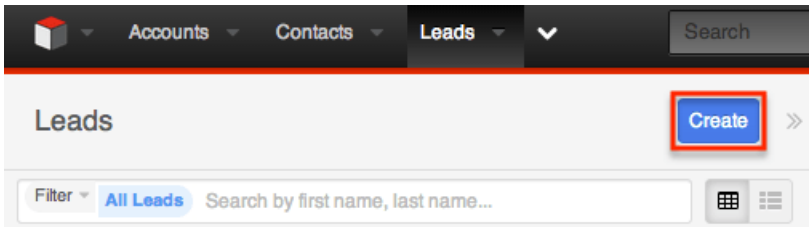
There are various methods for creating leads in Sugar including via the Leads module, quick create, vCard, duplication, emails, importing leads, web-to-lead form, and portal registration. The same record view layout opens when creating the lead directly from the Leads menu as well as via the Quick Create menu and includes all of the relevant fields for your organization's leads. Please note that administrators can configure the Record View layout via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

### Creating Via Leads Module

One of the most common methods of lead creation is via the Create Lead option in the Leads module tab. This opens up the record view layout which allows you to enter all the relevant information for the lead.

Use the following steps to create a lead via the Leads module:

1. Click the triangle in the Leads module tab to open the actions menu and select "Create Lead". You can also click the Create button on the upper right of the Leads list view.
   From Leads module tab:
   
   
   From Leads list view:



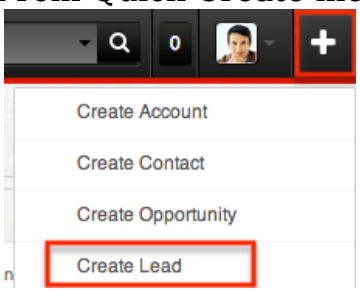

2. Enter appropriate values for the fields in the record view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".
    - Please note that you can also click the Actions menu to the right of the Save button to select the "Save and view" or "Save and create new" options. Save and view will display the record's details after the save is complete. The Save and create new option saves the current record and opens a new, blank record view in edit mode where the user can create another record.



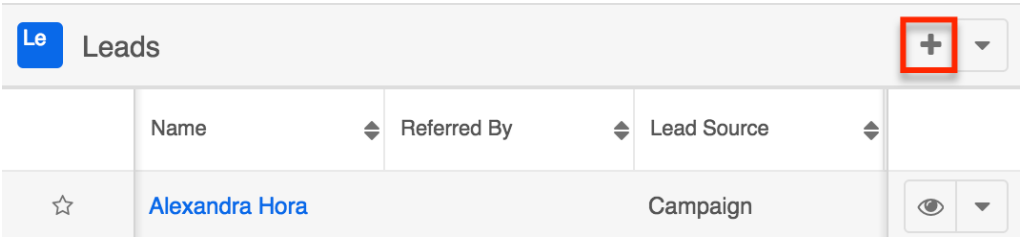

## Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of any Sugar page to access the menu. You can also quick create a lead from any Leads subpanel on related module records.
Use the following steps to create a lead via Quick Create:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Lead" or click the Plus button on any Leads subpanel on a related module's record view.
   From Quick Create menu:




   From subpanel:




2. Enter appropriate values in the fields in the record view form. All required fields will indicate "Required" in the field and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".

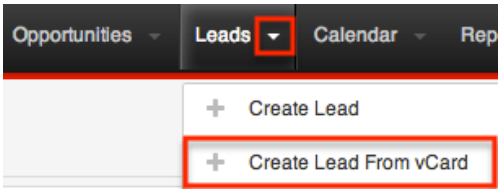



## Creating Via vCard

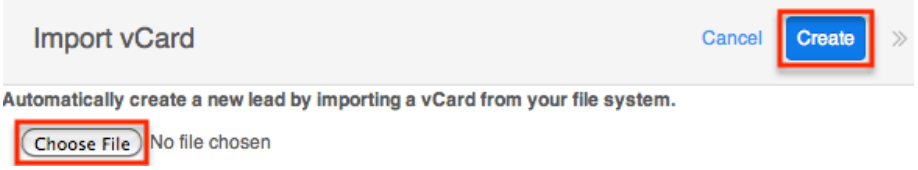
vCards are electronic business cards that are exchanged through applications such as email and web browsers. In addition to allowing leads to be saved as vCards for use in other software, you can also generate a new Sugar lead from a vCard.

Use the following steps to create a lead in Sugar via vCard:

1. Click the triangle in the Leads module tab to open the actions menu and select "Create Lead From vCard".




2. Choose the vCard file from your computer and click "Create".

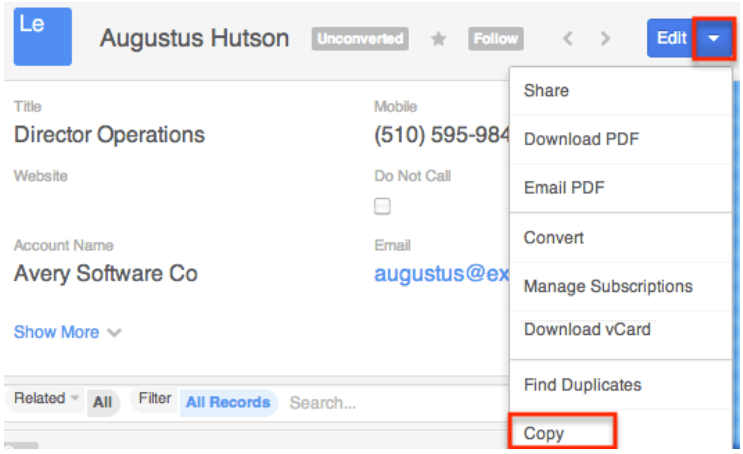



## Creating Via Duplication

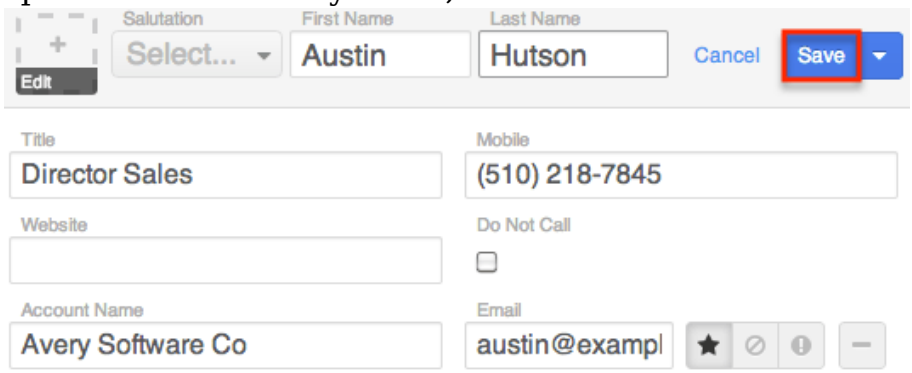
You can also create a new lead by duplicating an existing lead record. The Copy option is useful if the lead you are creating has similar information to an existing lead.

Use the following steps to create a lead by duplicating an existing record:

1. Navigate to a lead's record view.
2. Click the Actions menu and select "Copy".




3. The displayed record view is pre-populated with the original lead's values. Update the necessary fields, then click "Save".

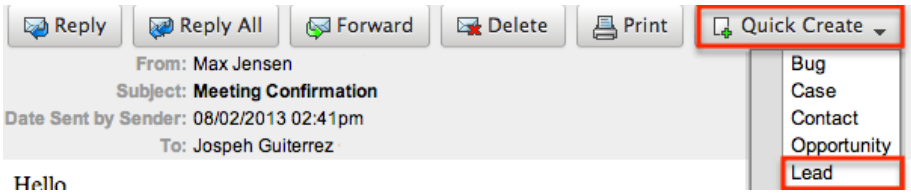



   Alternatively, you could use the Actions menu to the right of the Save button to select the "Save and view" or "Save and create new" options. Save and view will display the record's details after the save is complete. The Save and create new option saves the current record and opens a new, blank record view in edit mode where the user can create another record.

Note: When creating leads via duplication, the ID, Status, and Converted fields will not carry over to the new lead record. Furthermore, any Account ID, Opportunity ID, or Contact ID that is associated with the original lead will not be associated with the new lead record.

## Creating Via Emails

The Emails module enables users to create new lead records from external and imported emails using the Quick Create option. Simply click the Quick Create button above the selected email header then select "Lead".



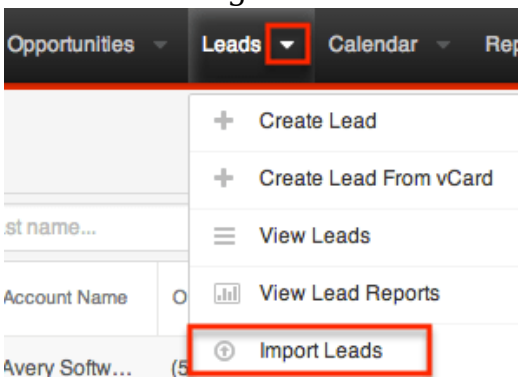

A pop-up window will open with the quick create form where you can enter relevant values for the new lead. The name and description fields are populated by default based on the emails header, body, etc. All required fields are marked with a red asterisk and must be completed prior to saving.Once the necessary information is entered, click "Save". For more information on how to create, send, and manage emails, please refer to the Emails documentation.

Please note that the selected email will be imported, if not already, and automatically related to the new lead. The email record will appear within the History dashlet of the Leads record view.

## Importing Leads

The import function allows you to push multiple lead records into Sugar using a comma (or other character) delimited file instead of creating them one-by-one. For more information on importing, please refer to the Import documentation.

Use the following steps to import leads via the Import Leads option:

1. Click the triangle in the Leads module tab and select "Import Leads".


2. In Step 1, select the source of the data you are importing. Click "Next".
3. In Step 2, select the import file and choose "Create new records only". Click "Next".
4. In Step 3, confirm the import file properties. Click "Next".
5. In Step 4, confirm the field mappings for the import. Click "Next".
6. In Step 6, view the import results.
    - The Created Records tab will show all of the new lead records.
    - The Duplicates tab will show any records in the file that were identified

as duplicates of existing records and thus not imported.
    - The Errors tab will show records that were not imported due to errors detected during import.

### Creating Via Web-to-Lead Form

Sugar provides a simple way to allow visitors to your website or other online location to become leads in your Sugar instance. You can create a web-to-lead form in Sugar and place the form on an external website. Then when a visitor to your site completes and submits the form, their information is entered into Sugar as a new lead record. For more information on creating and managing web-to-lead forms, please refer to the Web-To-Lead Forms documentation.

### Creating Via Portal Registration

Sugar provides administrators with an option to install and configure a self-service portal for their customers to interact with the users. The Sugar Portal allows your customers to file bugs, cases, and review knowledge base articles created in Sugar. When a potential portal user visits the portal login page and completes the registration form, their information is entered into Sugar as a new lead record. For more information on managing the Sugar portal, please refer to the Portal Deployment User Guide documentation.

## Viewing Leads

There are various options available for viewing lead records in Sugar including via Leads list view, Leads record view, Leads Recently Viewed menu, dashlets, and reports. Please note that you will only be able to see lead records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

### Viewing Via List View

The Leads list view displays all lead records meeting the current search criteria. Users can also access the activity stream to view posts specific to the lead record. For more information on viewing the activity stream, please refer to the Activity Stream section of this documentation. The Intelligence pane is viewable to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's sales, cases, activities, etc. For more information regarding the Intelligence Pane, please refer to the Intelligence Pane

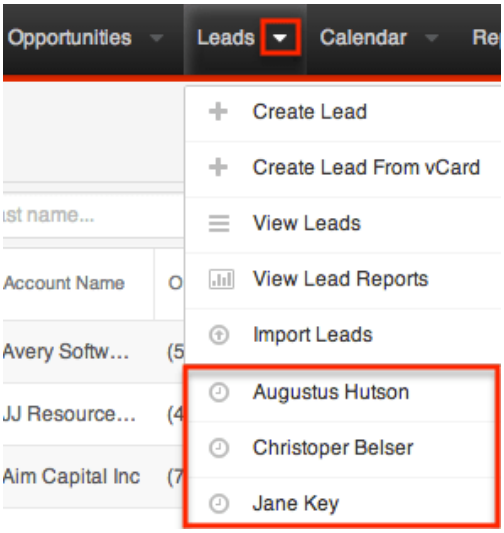
section of this documentation. To access the list view, simply click the Leads module tab. While list view shows key lead fields, you can click the lead's name to open the record view. For more information on viewing leads via list view, please refer to the Leads List View section of this documentation.

## Viewing Via Record View

The Leads record view displays thorough contact information including all lead fields followed by subpanels of the lead's related records belonging to various modules. Users can also access the activity stream to view posts specific to the lead record. For more information on viewing the activity stream, please refer to the Activity Stream section of this documentation. The Intelligence pane is viewable to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's sales, cases, activities, etc. For more information regarding the Intelligence Pane, please refer to the Intelligence Pane section of this documentation. The record view can be reached by clicking a lead record's link from anywhere in the application including from the Leads list view . For more information on viewing lead's via the record view, please refer to the Leads Record View section of this documentation.

## Viewing Via Recently Viewed

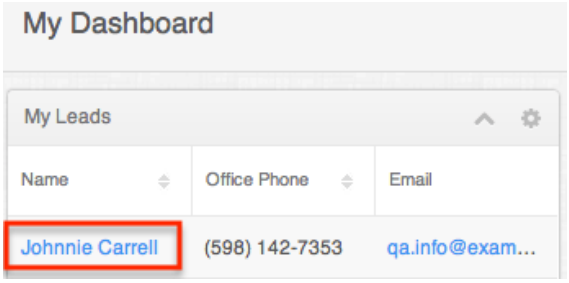
As you work, Sugar will keep track of which leads you have recently viewed. Click the Actions menu in the Leads module tab to see a list of your most recently viewed leads and click each name to open the Leads record view.




## Viewing Via Dashlets

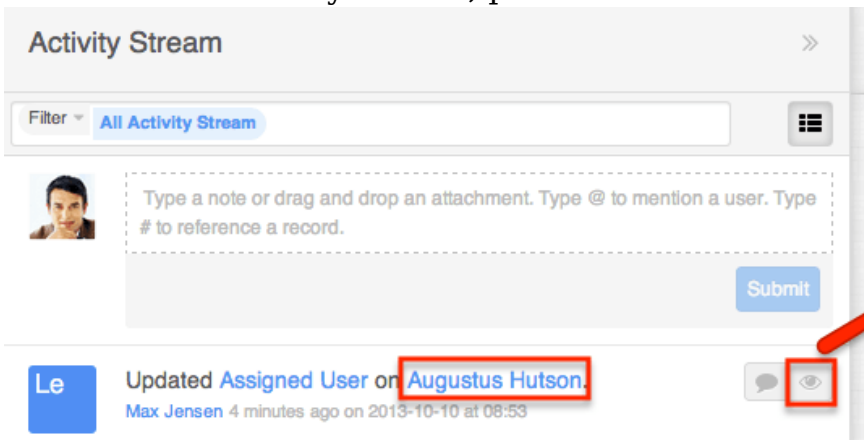
Sugar dashlets allow users to get a quick view of various records, activities,

reports, etc. Dashlets may be added to a user's Home page or to the intelligence pane of any module. You can view lead information in List View dashlets specific to the Leads module (e.g. My Leads dashlet). Clicking a lead's name from any dashlet will open the Leads record view. For more information on using dashlets and viewing lead records via dashlets, please refer to the Intelligence Pane documentation.




## Viewing Via Activity Streams

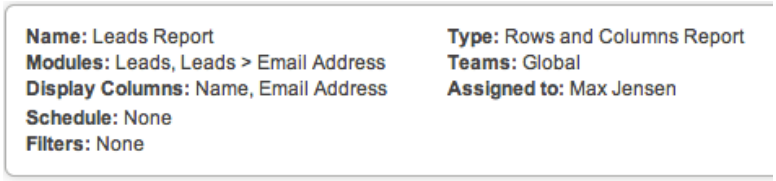
The activity stream allows users to view each other's activities in Sugar and the actions that took place for the various modules (e.g. Leads, etc.) via posts (record post, user post, etc). You can access the Leads record view by clicking the lead's name referenced in the post. You can also preview the lead record's detail directly from the activity stream by clicking the Preview button to the right of the post. For more information on viewing record details via the activity stream, please refer to the Activity Streams documentation.

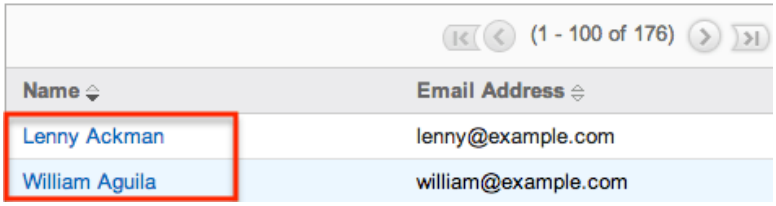



## Viewing Via Reports

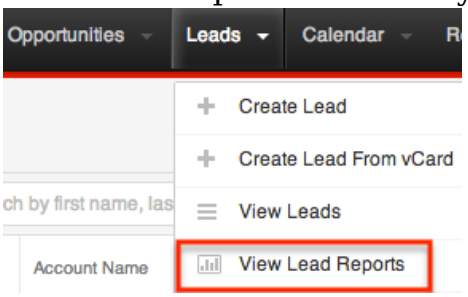
Users with access to the Reports module can build, run, and manage reports to gather key data regarding leads and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the leads record view by clicking the lead's name in the report results. Please note that you can only directly access record views with Rows and

Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation.




In addition to navigating to the Reports module and finding or building relevant reports, you can use the Lead module tab's View Lead Reports option to see all lead-based reports to which you have access.




Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

## Searching Leads

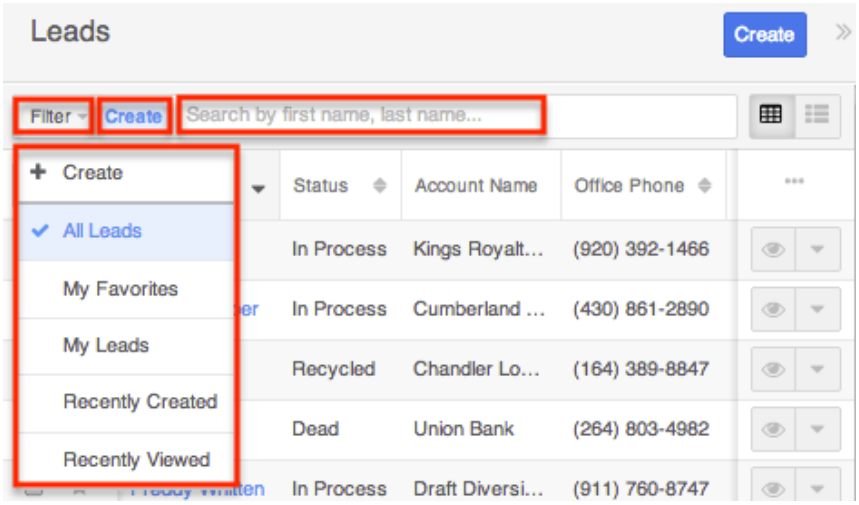
The Leads list view includes a module search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Leads list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %smith). This will pull up any record that has the word "smith" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

## Module Search

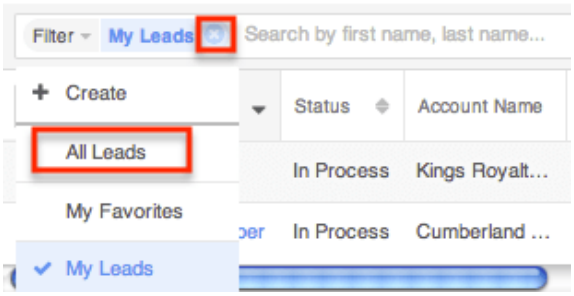
Module search enables users to easily search by lead name within the Leads module and pull up matching records in the list view. Records are deemed as matching when their first or last names start with any of the terms entered in the open Search box. The search also provides a Filter option which can be used in combination with the open Search box to narrow your search further using the available options as follows:

- Create : Create a new custom filter which you can use to filter your search
  - Note: You can also click "Create" to the right of the Filter option.
- All Leads : Returns all records in the module to which you have access
- My Favorites : Returns only records you have marked as favorites
- My Leads : Returns only records assigned to you
- Recently Created : Returns only records you created in the module within the last 7 days
- Recently Viewed : Returns only records you have viewed in the module within the last 7 days




When you choose a filter, Sugar will return leads which match both the selected filter and any name provided in the "Search by first name, last name..." bar in the filtered list view results. For example, if you select "My Leads" in the Filter options and enter a lead name, Sugar will only return lead records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search bar. To see all lead records to which you have access, simply select the All Leads option in the filter and remove any text

from the search bar. You can also click the Clear icon within the selected filter option (e.g. My Leads) in the Search bar to clear the filter and pull up all list view search results. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.




Please note that you will only be able to see lead records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Administrators can configure what fields appear on the Leads Module Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

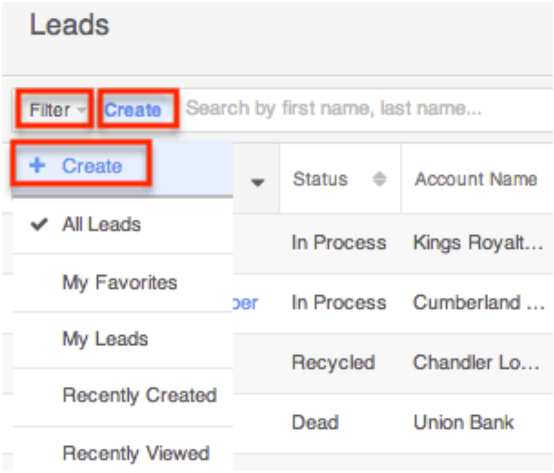
## Creating a Filter

Users can also create new filters via the Create option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the Leads list view. You may add multiple fields to your new filter by clicking the Plus button to the right of the filter selection dropdown lists and set select operators along with their value(s). A filter's criteria need to be true for a record in order for it to appear in the list view search result. Additionally, filters with no specified values may be saved as a custom filter to act as a filter template when a user often searches using the same fields but with varying values. Please note that only fields you have view access for will appear in the Filter list when creating a search filter.

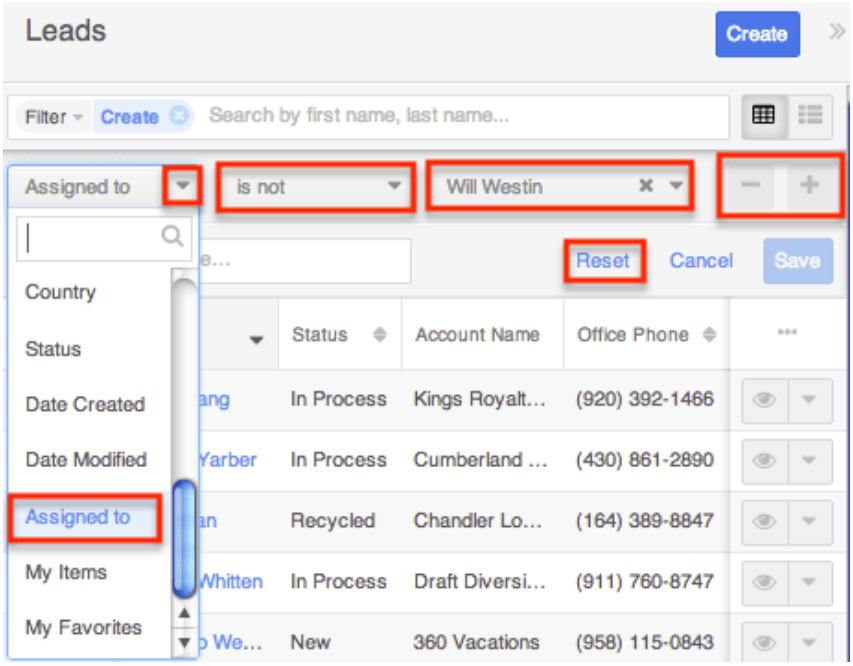
When you run a search using a created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.

The following steps cover creating a new Assigned to filter as an example:

1. Click the Filter option on the Leads search bar then select "Create".
    - You can also click "Create" to the right of the Filter option.




2. Select the field you wish to add to your filter as well as the condition and matching criteria.
    - Note: Only fields you have view access for will be available to add in the Filter list.
3. To add additional fields to the new filter, click the Plus button to the right of the filter.
    - To remove fields from the new filter, click the Minus button to the right of the filter.
    - To clear any filter values (e.g. Will Westin), simply click the "x" to the right of the value or select "Reset" to the left of the Save button.

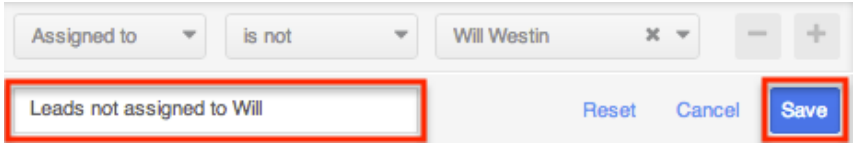



The list view will automatically display results matching your filters as you create and modify the criteria.

Saving a Filter

Saving a filter will preserve the chosen fields as well as the condition(s) of the matching value(s). Additionally, it will allow users to easily select previously created and saved filters from the Filter options.

The following steps cover saving a new search by Name filter as an example:

1. Create a new filter to perform a search on your desired fields.
2. Enter a name for the new filter (e.g. "Leads not assigned to Will").


3. Click "Save" to add this filter to the module's Filter options.

## Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search is used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.




To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation

in the Administration guide.

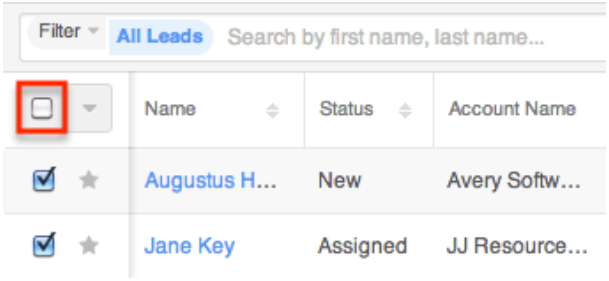
## Leads List View

The Leads list view displays all lead records meeting the current search criteria to which your user has access. You can view the basic details of each lead within the field columns. Please note that you will only be able to see lead records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

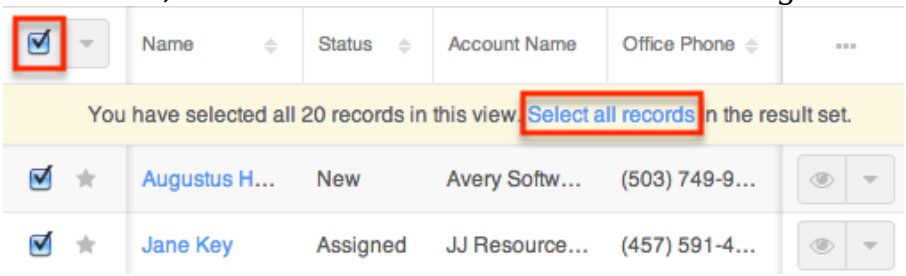
Users with administrator or developer access have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

### Checkbox Selection

You can perform several actions on lead records directly from the list view by first selecting the desired records. To select individual lead records on the Leads list view, mark the checkbox on the left of each row.

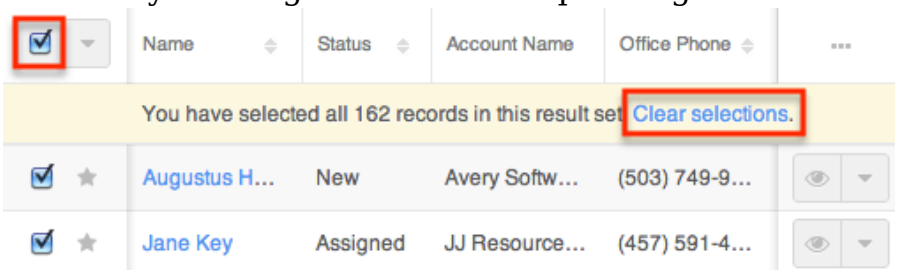



To select all lead records displayed on the current set of list view results, click the checkbox to the left of the Actions menu. A dialog will appear below the list view column headers indicating that you have selected all records on the list view's current results set (e.g. 20). To select all records in the Leads list view's search results set, click "Select all records" in the dialog.



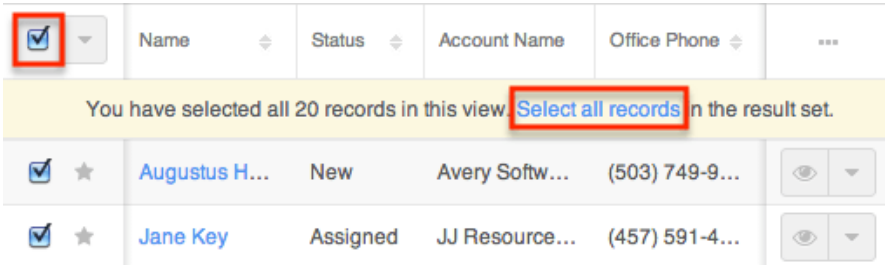

If you wish to clear the selection for all records on the list view result set, simply click "Clear selections" in the dialog. You can also clear the selections for all

records by clicking the checkbox option again to remove the check marks.

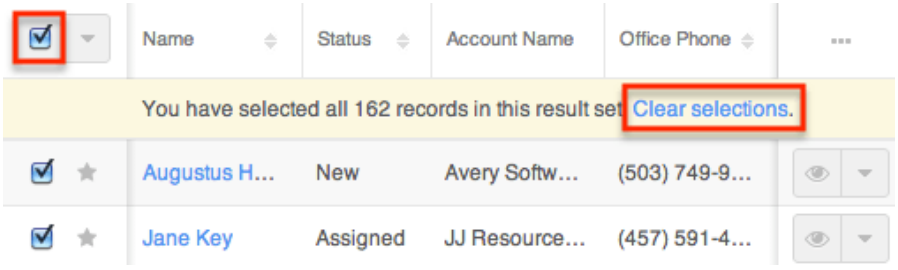



## Total Record Count

You can view the total record count on the Leads list view by selecting all records displayed on the current set of list view results. Once the records are selected, a dialog will appear allowing you to select all records in the results set.

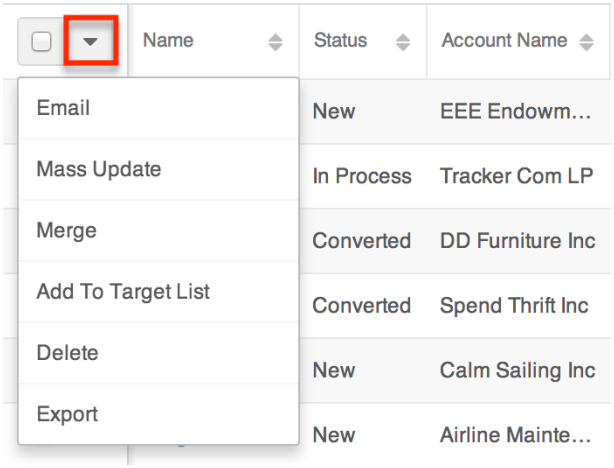



The total count of all records on the list view result set will appear in the dialog.




## Mass Actions Menu

The Mass Actions menu to the right of the checkbox option allows you to perform various actions on the currently selected records.

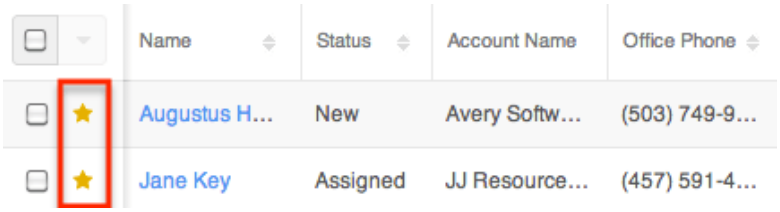



The options in the Mass Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Email | Email one or more leads at a time |
| Mass Update | Mass update one or more leads at a time |
| Merge | Merge two or more duplicate leads |
| Add to Target List | Add one or more leads to a target list |
| Delete | Delete one or more leads at a time |
| Export | Export one or more leads to a CSV file |
| Recalculate Values | (Available in certain circumstances) Updates calculated values to reflect changes to calculated fields made in Studio |

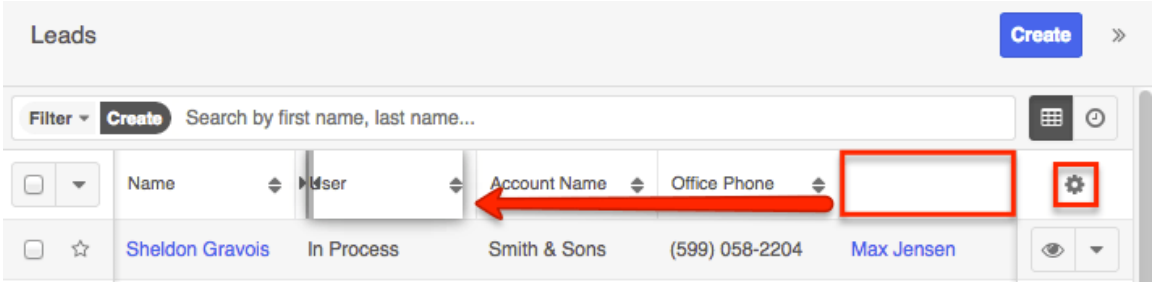
## Favorite Designation

Users have the option to mark lead records as favorites via the list view as well as the record view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the Leads module tab. In the Leads list view, the star on the left of each lead's row is orange once marked to indicate a favorite lead. For more information on how to mark records as favorites, please refer to the Favoriting Leads section of this documentation.



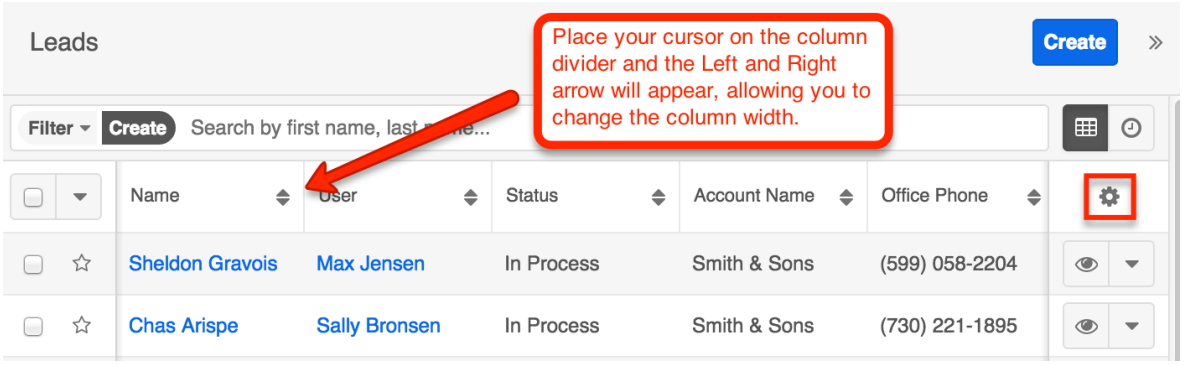
## Column Reordering

List view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the default column order.




## Column Resizing

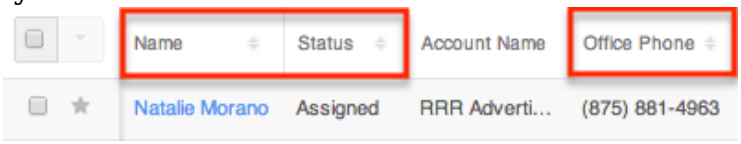
Users can easily adjust the size of columns in the Leads list view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the current list view is different from the default column width. Changes to the column width made by administrators in Studio are only respected if the user has not resized the specific column in the list view. The column size set by the user will supersede the default column width configured in Studio until the user resets the list view back to the default widths.



## Column Sorting

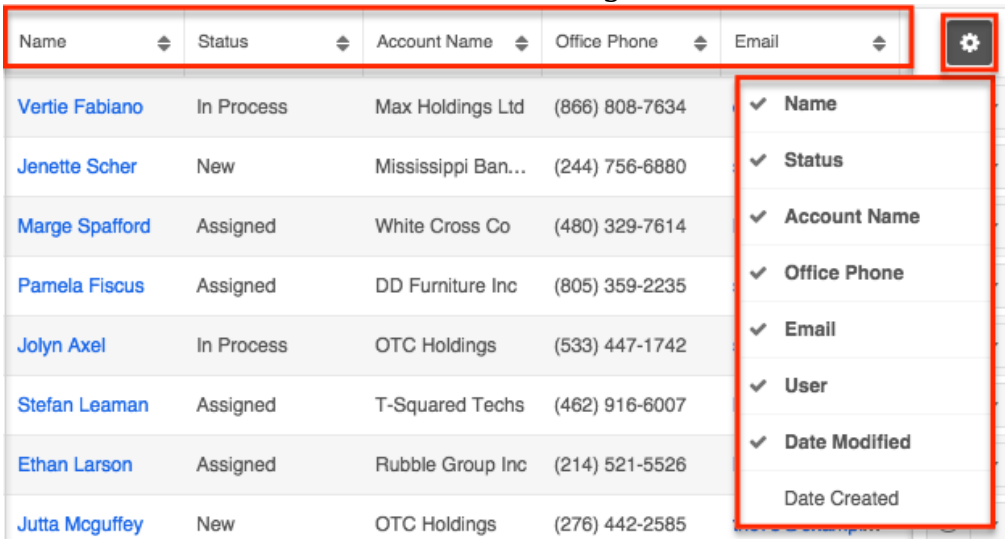
List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows.

Note: List views may only be sorted by one column at a time and cannot be sorted by custom relate fields.



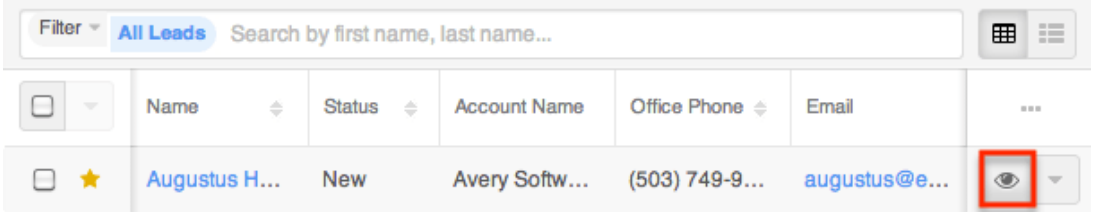

## Column Selection

Sugar gives users the ability to personalize the list view by specifying which fields they want to be displayed in the list view. You can click the Column Selection icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column on your list view. Please note that administrators have the ability to configure what fields are available to display in the list view via Admin > Studio. For more information on configuring fields to display in the list view, please refer to the Studio documentation in the Administration guide.

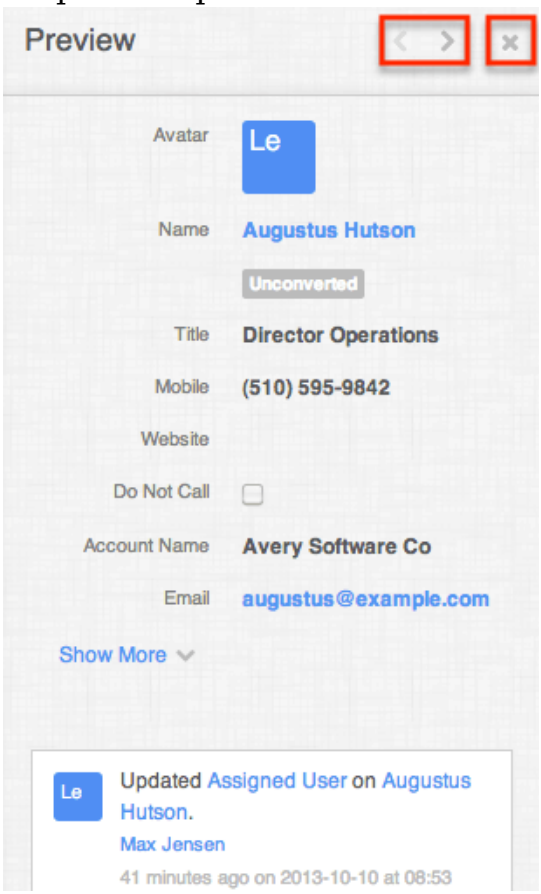



## Preview

Users can view a record's details directly from the Leads list view by clicking the Preview icon to the far right of each lead's row.

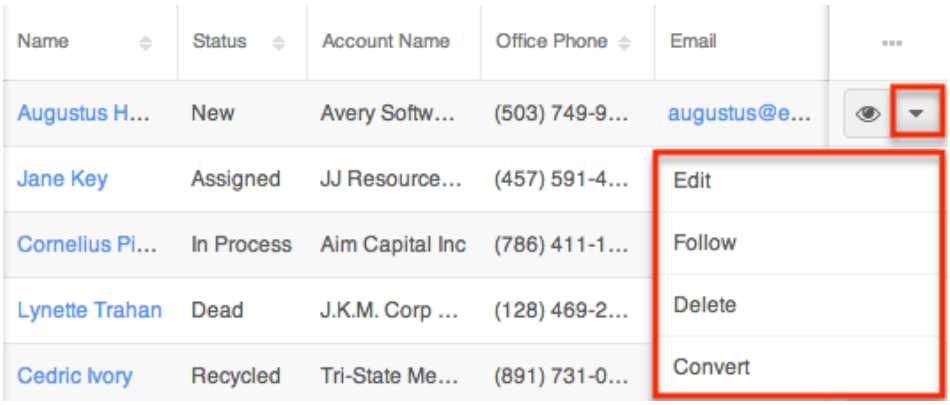



The record's data will display to the right of the list view providing key information regarding the record as well as the related activity stream information. On the upper right of the preview pane, there is a Left and Right arrow button that allows you to scroll through the list view's current search results by previewing the next or previous record. To close the preview, simply click the "X" on the upper right of the preview pane.




## Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to edit, follow, delete, or convert specific records directly from the list view.

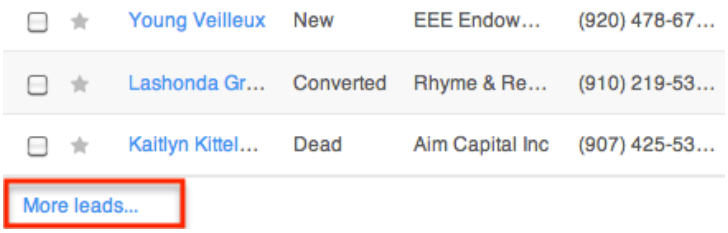



The options in the Record Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this lead |
| Follow | Follow this lead |
| Delete | Delete this lead |
| Convert | Convert this lead |

## More Leads

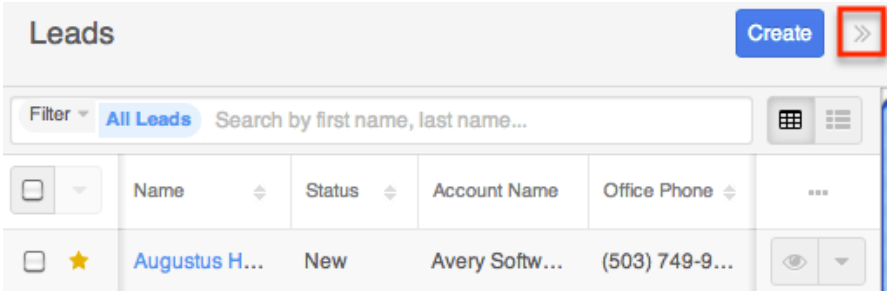
The list view loads an initial number of records meeting the current search criteria with the option to show additional results at the user's request. By default, Sugar displays 20 records per list view results set, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide. To load the next set of list view results, simply click the More Leads link at the bottom of the list view.




## Right Hand Side Drawer

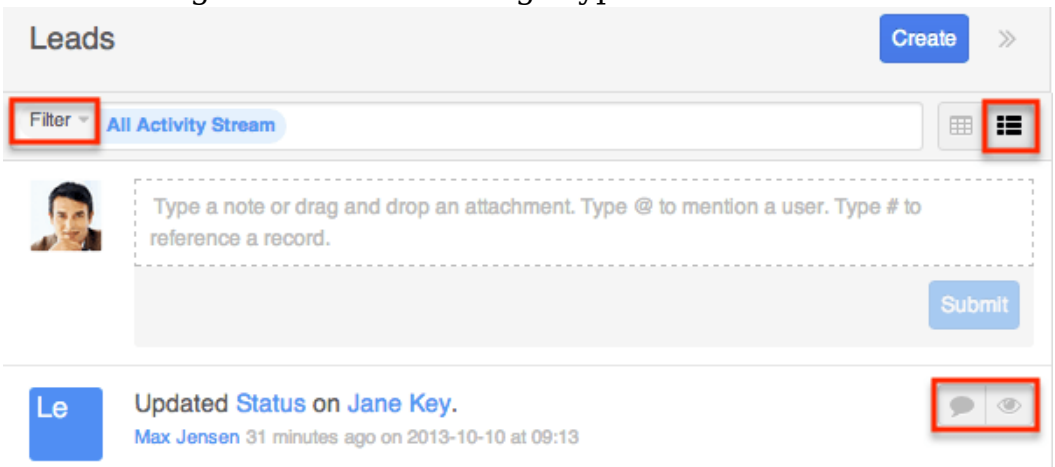
On the upper right of the Leads list view there is a Double arrow icon which allows users to expand the list view to the full screen width. The intelligence pane to the right of the list view will be hidden when the list view is expanded. To reduce the

list view's width and reveal the intelligence pane, simply click the Double arrow icon again.




## Activity Stream

The Leads module's activity stream displays user posts made on the Leads module and record posts relevant to a lead record. To view the module's activity stream, simply click the Activity Stream button to the right of the list view's search bar. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts using the comment button to the far right of each post. You can also preview the record referenced in record posts by clicking the Preview button to the right of each post. The activity stream can be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box and selecting the desired message type.

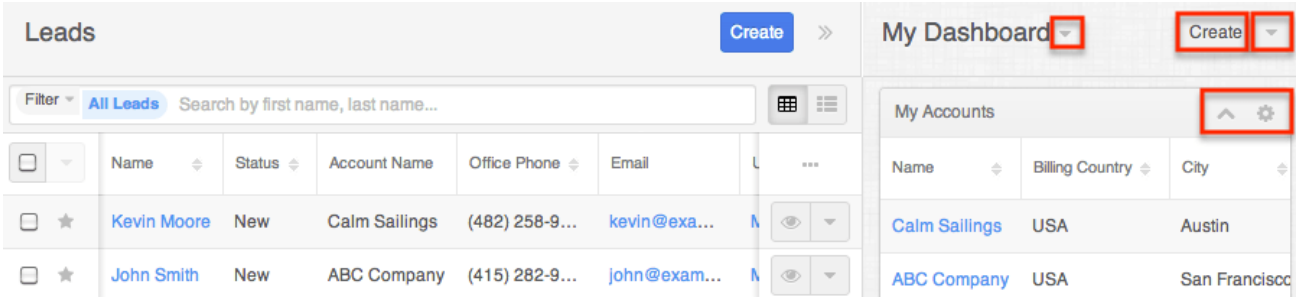



## Intelligence Pane

An intelligence pane displays to the right of the Leads list view and provides users with valuable record information via various dashlets.The Help dashboard normally displays by default along with the List View Help dashlet and Learning Resources dashlet. The List View Help dashlet provides users with a brief introduction to the module along with a link (e.g. Leads documentation) to the corresponding documentation in the Application guide. The Learning Resources dashlet includes

links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may create other dashboards for use with the Leads module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets (e.g. My Accounts, etc.) to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do not wish to view by clicking the Gear icon and selecting "Minimize". Sugar will remember the state of your intelligence pane the next time you return to the Leads module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.



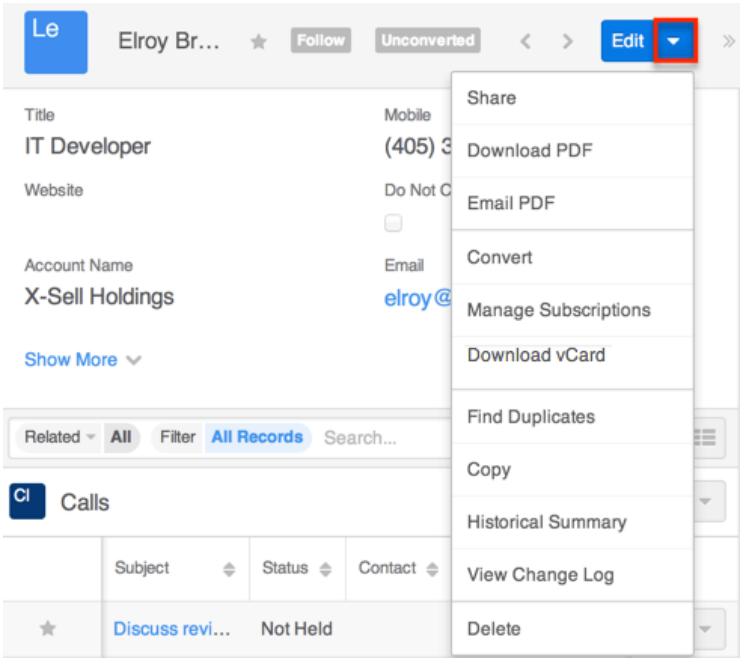

## Leads Record View

The Leads record view displays thorough lead information including all lead fields. Beneath the fields you can toggle between viewing a lead's subpanels of related records (Campaigns) and the lead's activity stream. The record view can be reached by clicking a lead record's link from anywhere in the application including from the Leads list view.

Please note that you will only be able to view a lead record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Users with administrator or developer access have the ability to change the record view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

### Actions Menu

The Actions menu on the top right of each lead's record view allows you to perform various actions on the current record.



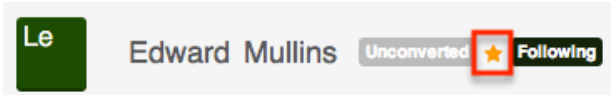

The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this lead |
| Share | Share a link to this lead via email |
| Download PDF | Download lead information as a PDF file |
| Email PDF | Email lead information as a PDF attachment |
| Convert | Convert a qualified lead into a contact, account, or opportunity |
| Manage Subscriptions | Manage this lead's campaign subscriptions |
| Download vCard | Download a vCard from Sugar and transfer this lead's information to another application (e.g. Outlook) |
| Find Duplicates | Locate potential duplicates of this lead |
| Copy | Duplicate this lead |
| Historical Summary | View a historical summary of activities (e.g. calls, meetings, etc.) related to this lead |
| | |

| | |
|---|---|
| View Change Log | View a record of changes to this lead |
| Delete | Delete this lead |

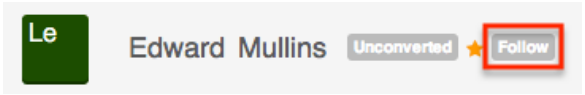
## Favorite Designation

Users have the option to mark lead records as a favorite via the record view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the Leads module tab. In the Leads record view, the star on the right of the lead's name is orange once favorited.For more information on how to mark records as favorites, please refer to the Favoriting Leads section of this documentation.




## Following Designation

Users also have the option to follow lead records via the record view or list view. This allows users to view record posts from followed leads on their Home page and Leads list view activity streams. Each user can personalize their activity stream by viewing posts for records that are most important to them. From the record view, users may follow or unfollow leads to which they have access using the Follow button to the right of the lead's name. For more information on how to mark records to follow via the list view, please refer to the Record Actions Menu section of this documentation. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. If you wish to stop following a specific lead record, click the Following button to revert it to gray. Should a user lose access to a record in Sugar, they will automatically stop following that record.

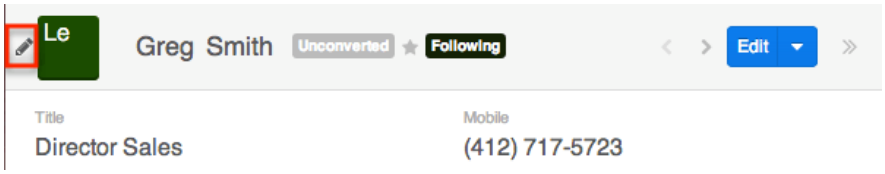



## Lead Image

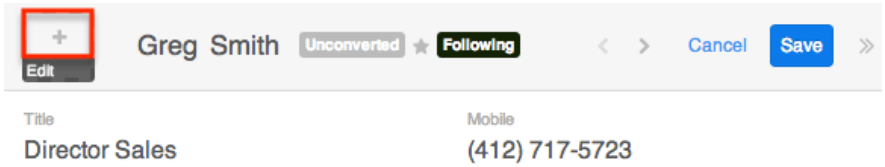
On the upper left of the Leads record view, users have the option to upload a profile image to identify the lead in Sugar. The image can be loaded via the Leads record view by clicking the Pencil icon to the left of the Leads icon image or clicking the Edit button on the upper right.

The following steps cover uploading an image via the Leads record view as an example:

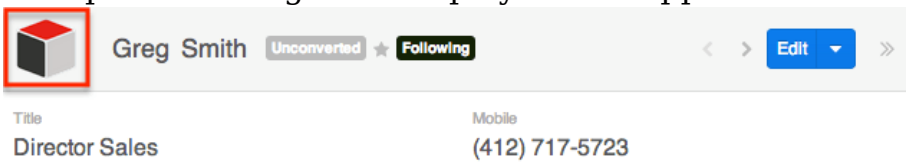
1. Navigate to a lead's record view.
2. Click the Pencil icon to the left of the Leads icon on the upper left.




3. Click the Plus button to upload an image from your local machine then click "Save".

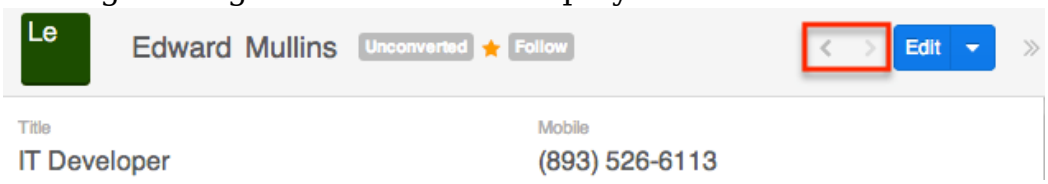



The uploaded image will display on the upper left of the Leads record view.



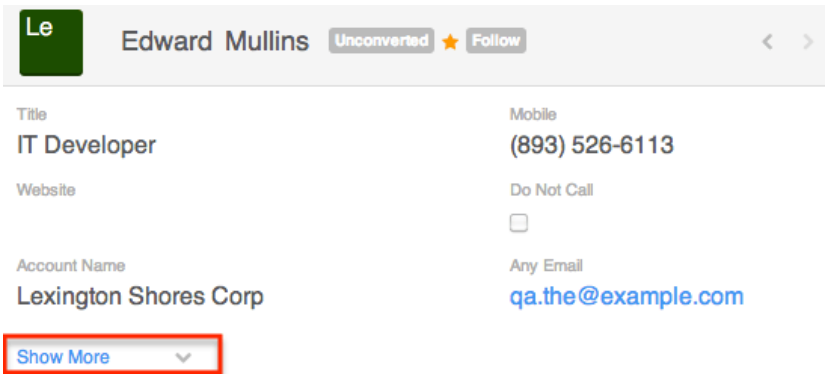

## Next or Previous Record

On the upper right of the Leads record view, there are two buttons that allow you to page through each lead in the Leads list view's current search results. Clicking the Left arrow button displays the previous lead of the current search results while clicking the Right arrow button displays the next lead of the current search results.



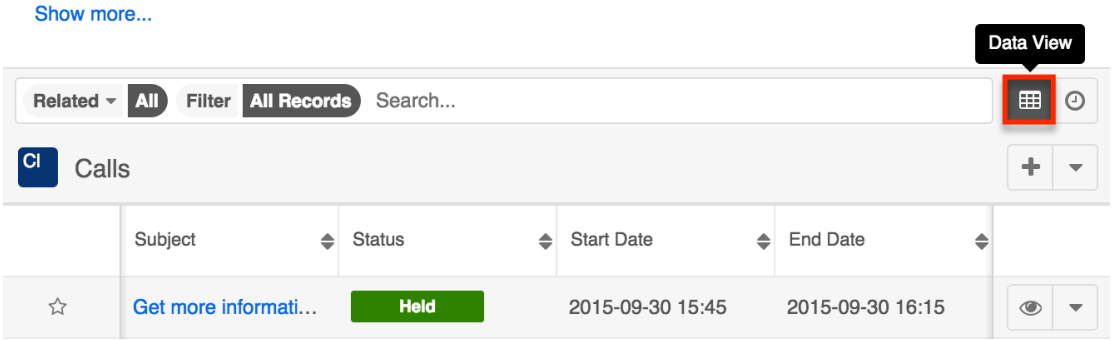

## Show More

The Leads record view typically display a few key fields (e.g. title, mobile, website, etc.) on the business card panel with the option to view more fields by clicking the Show More link on the bottom left. Please note that administrators can configure what fields appear on the business card panel via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.



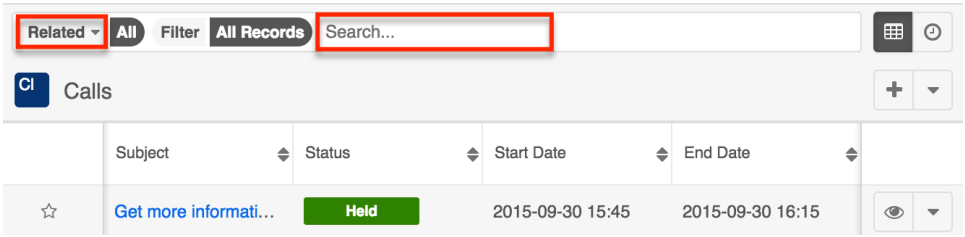

## Subpanels

Beneath a lead record's fields are subpanels containing related records from various modules as well as campaign interaction history for this lead. Selecting the Data View button will display the subpanels rather than the record's activity stream.

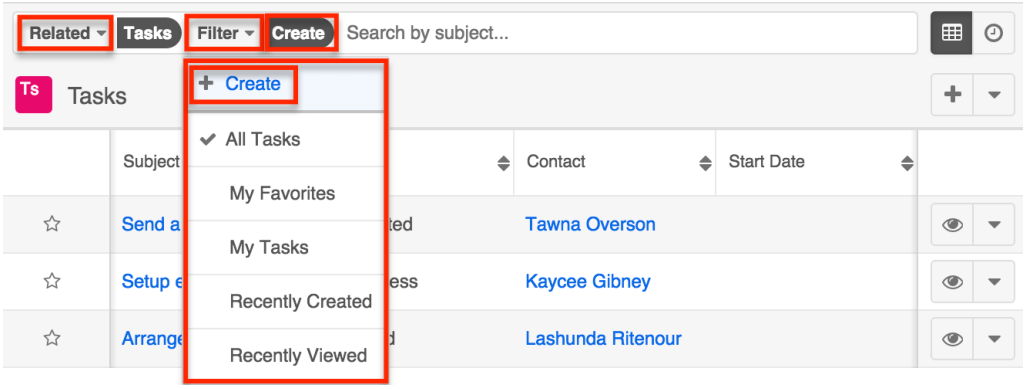



### Filter Options

While in Data View, all of the lead record's related records will be displayed beneath the lead record's fields. Users have the ability to search for records which appear in the subpanels as well as filter the view to only display a specific module (e.g. Campaigns). To locate a record by name, enter the keyword into the Search bar, and the subpanel(s) with the matching record(s) will appear below. To filter, simply click the Related option to the far left of the Search bar and select the module whose subpanel you wish to view. Filter and search may be combined to only display matching records within a selected module. To see all subpanels to which you have access, simply select "All" in the Related options and remove any text from the search bar. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the page. Returning to the page will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.

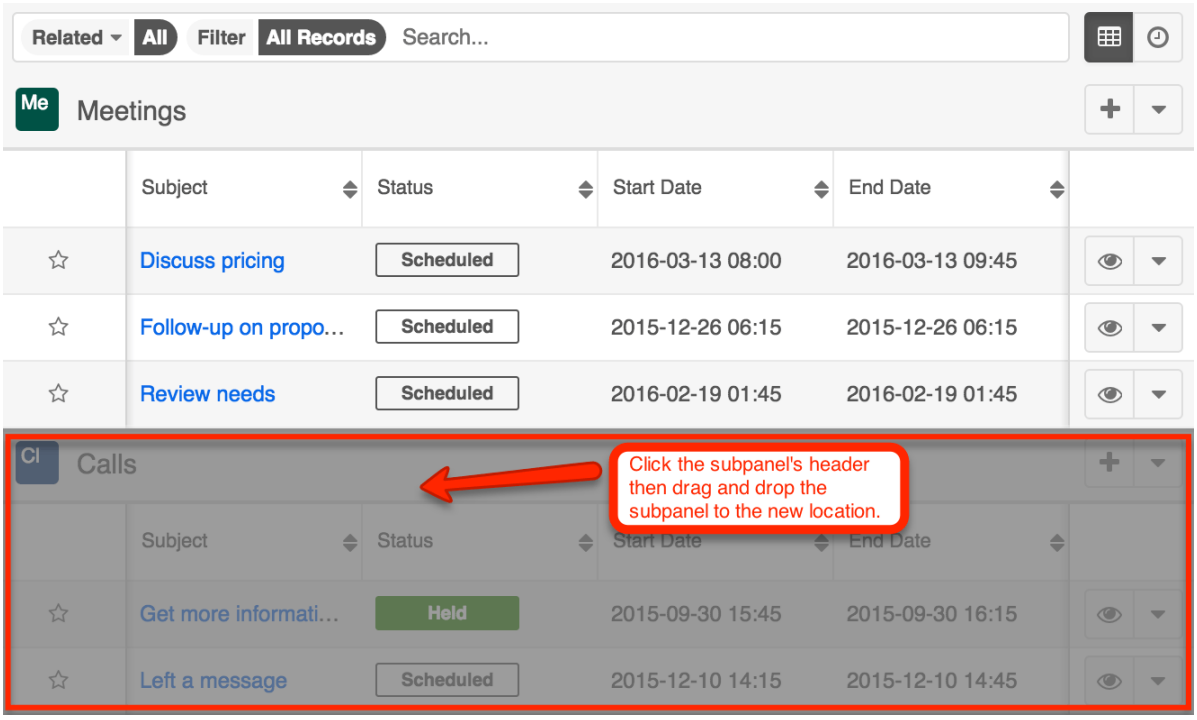



When a Sidecar module (e.g. Notes, Tasks, etc.) is selected from the Related options, you have the option to filter the related subpanels further using one of the available options (e.g. My Favorites, Recently Created, etc.). Please note that you can also create custom filters for related Sidecar modules. Once the related module (e.g. Tasks) is selected, either click the Filter option and select "Create" or click "Create" to the right of the Filter option. For more information on creating a related records filter, please refer to the Creating a Related Records Filter section of the Search documentation.




## Reordering Subpanels

Users can easily move subpanels to a new location on the record view by dragging and dropping the subpanel's header. The new subpanel order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared.




Related Record Subpanels

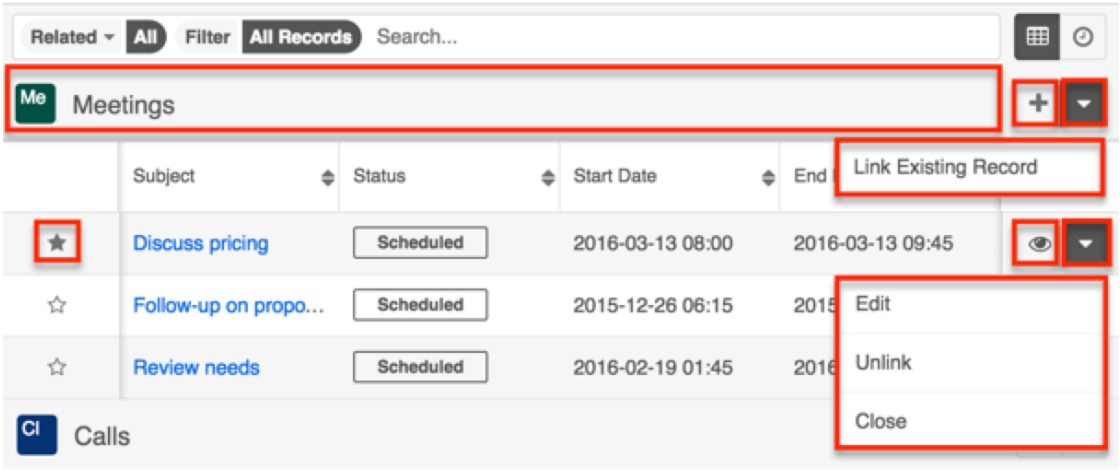
Modules in Sugar display subpanels, which allow users to view related records from other modules. Users can view the details of the related record as well as relate new or existing records via the subpanel. The most common type of subpanels displayed on a lead's record view contain the lead's related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. For example, a lead may be related to multiple calls which means that the related call will be displayed in a subpanel beneath the fields.

Users with administrator or developer access also have the ability to change the fields (e.g. Name, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.

Related record subpanels allow the following operations to be performed:

- To view the details of a related record, click the record's name in the subpanel to open it in record view or detail view.
- To relate an existing record to the lead, choose "Link Existing Record" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the lead, click the Plus button to the left of the Actions menu, then complete the record view layout and click "Save".

- To preview the related record for Sidecar modules (e.g. Notes), click the Preview icon to the far right of the record's row in the subpanel.
- To inline edit the record directly from the subpanel, choose "Edit" from the Actions menu on the far right of the record's row and click "Save" to preserve the change. For Legacy module subpanels (e.g. Meetings), click the Pencil icon on the far right of the record's row.
- To delete the lead's relationship to a record, choose "Unlink" from the Actions menu on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To mark the record as a favorite, click the star icon to the left of the desired record's row.
- To collapse or expand the subpanel, click anywhere within the subpanel's header.
- To change the column size in the subpanel, place your cursor on the column divider and when the Left and Right arrow appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.

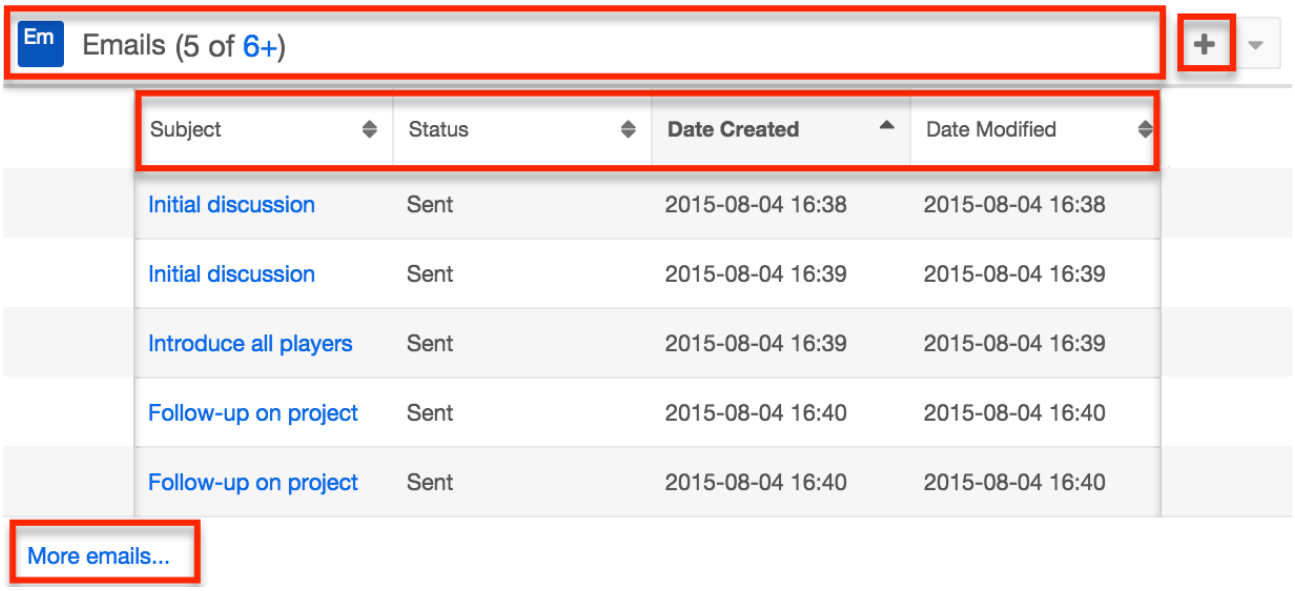



Emails Subpanel

The Emails subpanel in the Leads module displays both emails implicitly and explicitly related to the account record. Emails in Sugar are implicitly related to records in Sugar that match an email address in the From, To, or Cc fields in the email. This implicit relationship is made for emails sent from Sugar as well as any email imported into Sugar via Inbound email accounts or email archiving. While composing an email or relating an existing email to a record, users have the ability to set an explicit relationship via the flex relate field by Relating Emails. This allows the email to be explicitly related to a single record from one of many modules.

The Emails subpanel allows the following functions to be performed:

- To view the details of an email, click the subject in the subpanel to open it in detail view.
- To collapse or expand the subpanel, click anywhere within the subpanel's header.
- Click "+" to create a new email that will have an implicit relationship with this record.
- Sort the emails by Subject, Status, Date Created, Date Modified, or Assigned User.
- Click "More emails" to see any additional emails hidden by the default view.
- To change the column size in the subpanel, place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. For more information on resizing columns, please refer to the Column Resizing section of this documentation.
    - Note: The subpanel column width will not be preserved when you navigate away from the page.



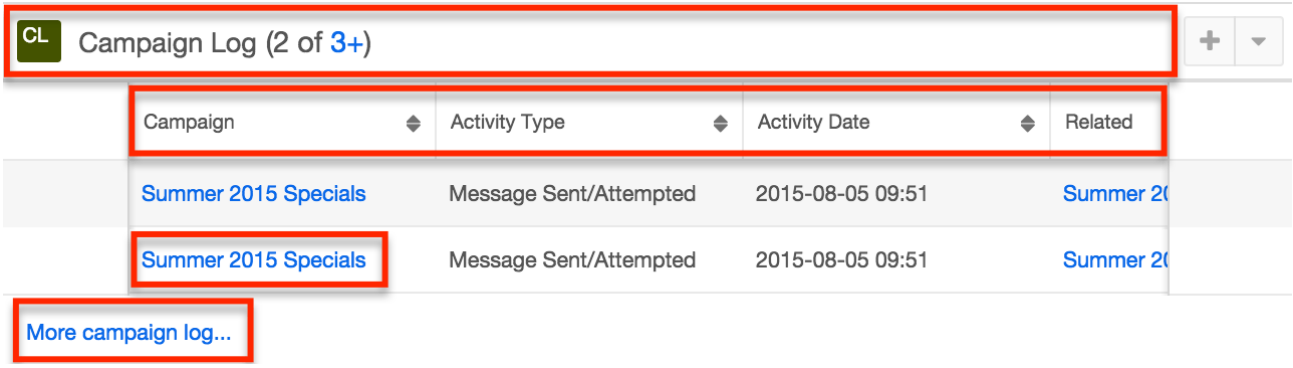

Campaign Log Subpanel

The Campaign Log subpanel contains historical information regarding a lead record's interaction with all Sugar campaigns. When a mass marketing campaign is sent to a lead (or manually marked as sent in the case of non-email campaigns), the related campaign activity information will appear within the Campaign Log subpanel. This information mirrors the "View Status" page available from within each individual campaign and shows activities such as when a campaign was sent, when the recipient viewed the campaign message, when the recipient clicked a tracked link within the campaign, etc. Since this subpanel contains historical campaign interactions for the lead, it cannot be used to associate a lead with a campaign or otherwise manage a campaign or target list. For more information on

associating a lead with a campaign, please refer to the Adding Leads to a Target List section of this documentation. For more information on campaigns, please refer to the Campaigns documentation.

The Campaign Log subpanel allows the following functions to be performed:

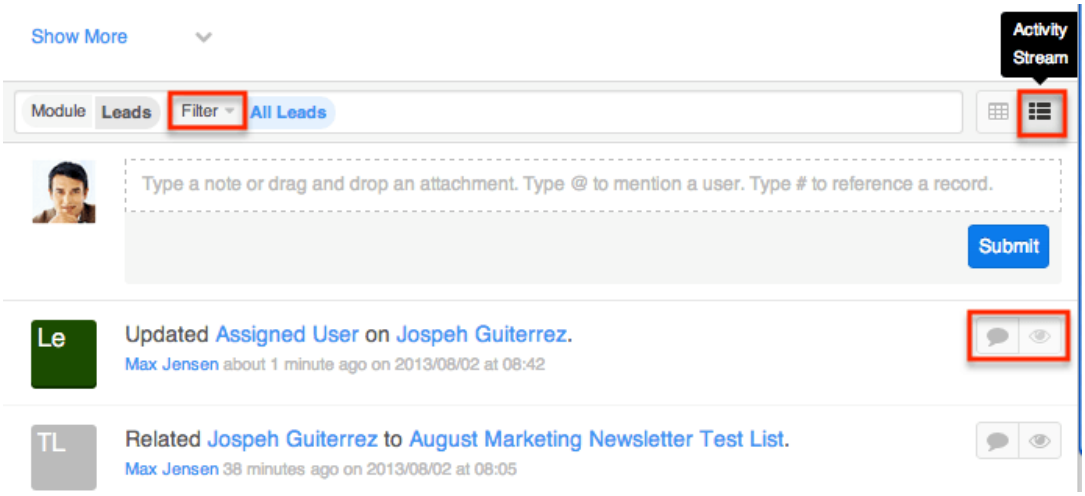
- To view the details of a campaign, click the campaign's name in the subpanel to open it in detail view.
- Sort the campaigns by Campaign Name, Activity Type, Activity Date, or Related.
- To collapse or expand the subpanel, click anywhere within the subpanel's header.
- To load the next set of records in the subpanel, click the More campaign log link on the bottom left of the subpanel.
- To change the column size in the subpanel, place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. For more information on resizing columns, please refer to the Column Resizing section of this documentation.
    - Note: The subpanel column width will not be preserved when you navigate away from the page.




## Activity Stream

Record view's activity stream displays user posts and record posts specific to the individual lead record. To view the record's activity stream, simply click the Activity Stream button below the lead's fields. Users can view all posts in the record view's activity stream even if they do not follow the record in Sugar. Please note that you must follow the record if you wish to view the record view posts via the Home page or List View activity stream. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts by clicking the Comment button to the far right of each post, entering your comment, then clicking "Reply". You can also preview the record referenced in the record post by clicking the Preview button. The activity

stream can also be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box then selecting the desired message type.

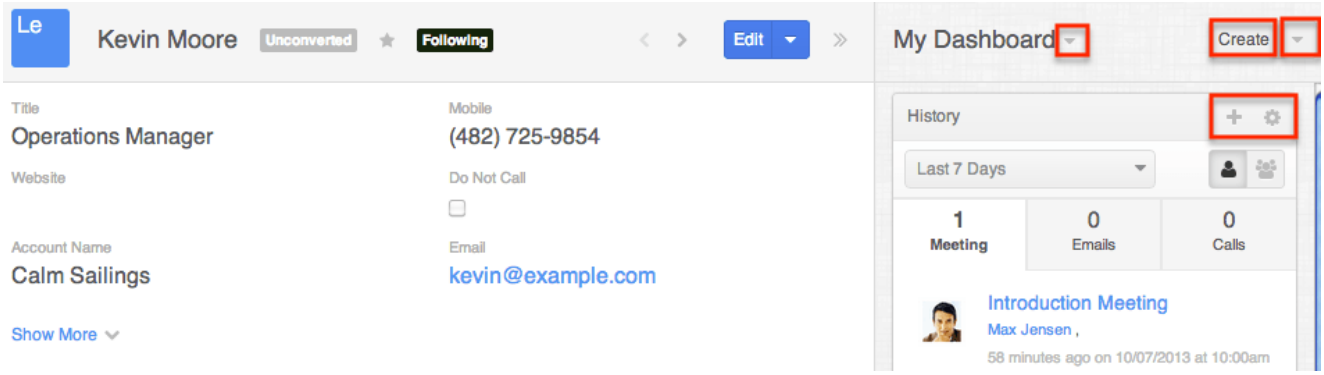



## Intelligence Pane

An intelligence pane displays to the right of the lead's record view and provides users with valuable information specific to the lead's activities. The Help Dashboard normally displays by default along with the Record View Help dashlet and Learning Resources dashlet. The Record View Help dashlet provides users with a brief introduction to the module along with some instructions to help users utilize and navigate around the record view. A link to the corresponding documentation (e.g. Leads documentation) in the Application guide is also provided within the Help dashlet. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard, which will display some stock dashlets (e.g. Planned Activities dashlet, History dashlet , etc.) by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may choose to view any of their dashboards using the triangle to the right of the current dashboard's name and may create other dashboards for use with the Leads module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets to their dashboards.

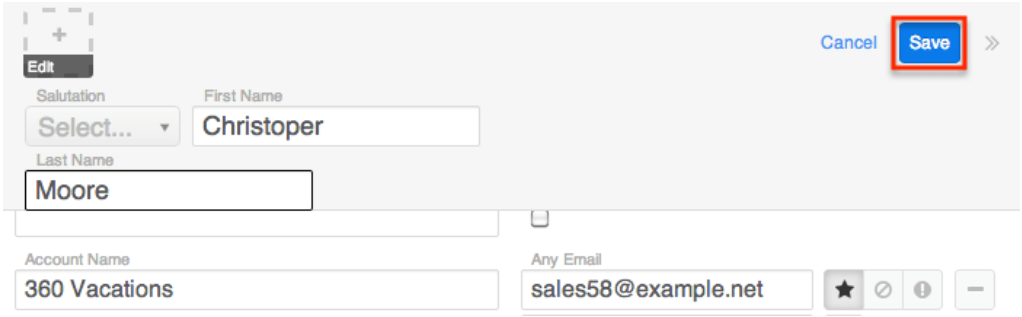
Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do not wish to view by clicking the Gear icon and selecting "Minimize". Sugar will remember the state of your intelligence pane the next time you return to the Leads module. For more

information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.




## Editing Leads

Leads may be edited at any time to update or add information to the record. You can make changes to existing lead records via the Leads record view. The record view is available within the Leads module and includes all of the Lead fields you should need.

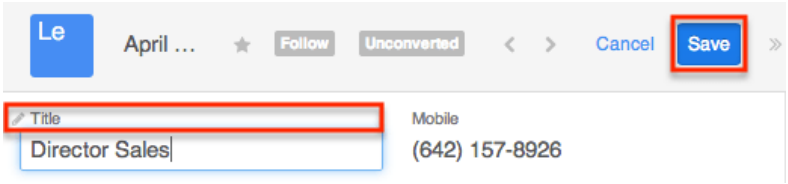



Please note that your ability to edit leads in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure the Leads record view via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

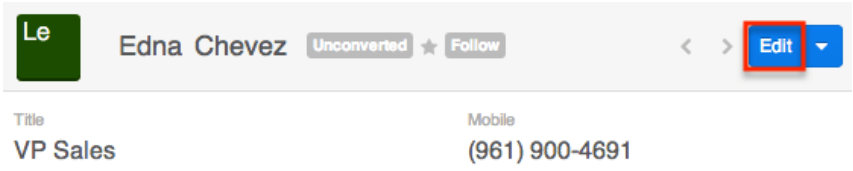
### Editing Inline Via Record View

Users can edit individual fields on the Leads record view without entering the full edit mode by clicking the field name. Fields which are available for inline editing will display a pencil icon when hovering on the field name or value. This will allow users to type or select a new value. Click "Save" to preserve the changes made to the field.



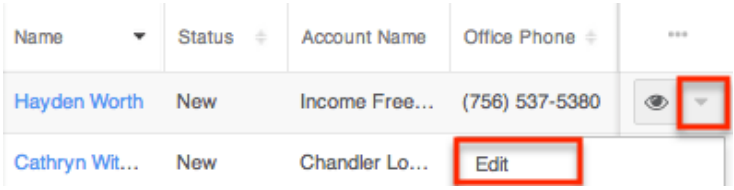

## Editing Via Record View

You can edit lead fields at once via the record view by clicking the Edit button on the upper right of the page. Once the record view layout is open, update the necessary fields, then click "Save" to preserve the changes made.

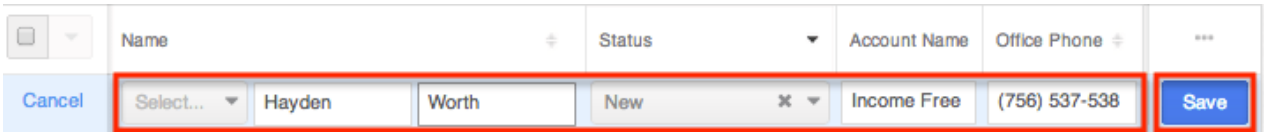



## Editing Inline Via List View

You can also edit individual fields on the Leads list view without entering the full edit mode. Click the Record Actions menu to the far right of the record's row and select "Edit".




The fields on the record's row will open up allowing users to type or select a new value. You can click the double arrow icon on the upper right of the page to expand the list view for editing. Click "Save" to preserve the changes made to the lead record.




Note: Text area fields are not inline editable from list views.

# Deleting Leads

If a lead record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Leads record view or list view. Deleting

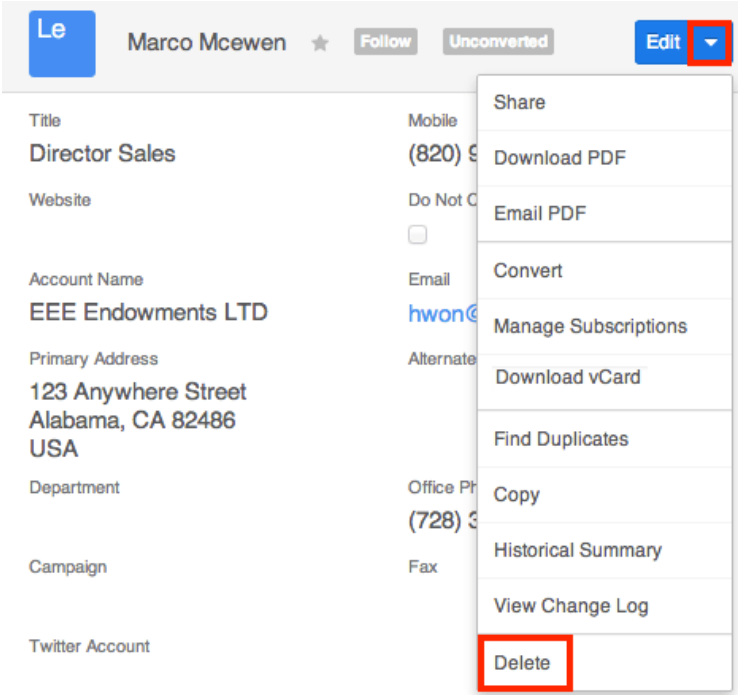
via the record view allows you to delete a single record while the list view allows for mass deleting multiple records at once as well as single record deletions. Deleting lead records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

Please note that your ability to delete leads in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

## Deleting Via Record View

Use the following steps to delete a lead record via the record view:

1. Navigate to a lead's record view.
2. Select "Delete" from the Actions menu.

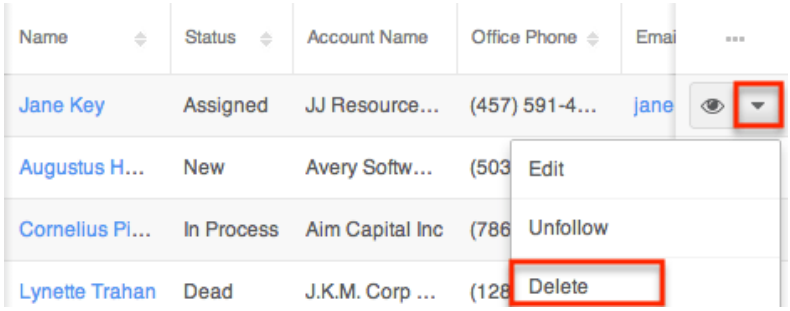



3. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

## Deleting Via List View

Use the following steps to delete a lead record via the list view:

1. Navigate to the Leads list view by clicking the Leads module tab.
2. Use the Module Search to find the Lead record you wish to delete.
3. Click the Record Actions Menu to the far right of the record's row and select "Delete".

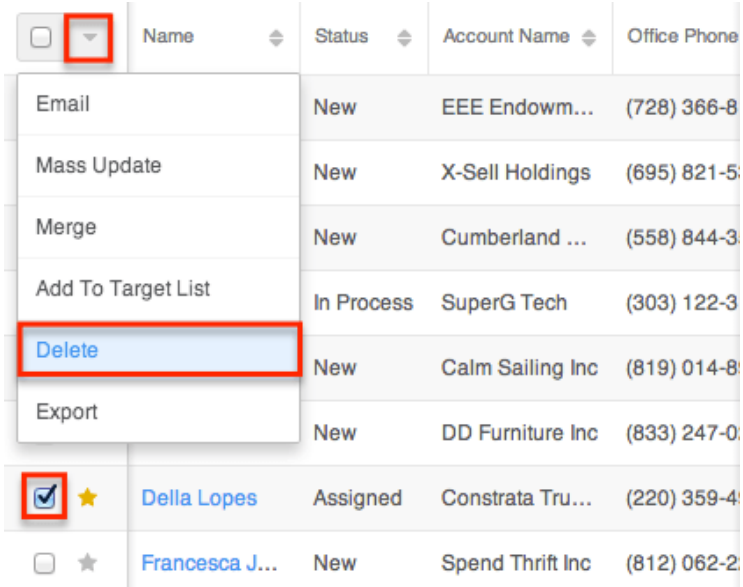



4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

## Mass Deleting Via List View

Use the following steps to delete one or more lead records via the list view:

1. Navigate to the Leads list view by clicking the Leads module tab.
2. Use the Module Search to find the Lead records you wish to delete.
3. Select the desired lead records then choose "Delete" from the Actions menu.




4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

You can also use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to delete more than 1000 records or delete a specific group of records on the list view, please use the in module search to perform the deletions in smaller batches.

# Converting Leads

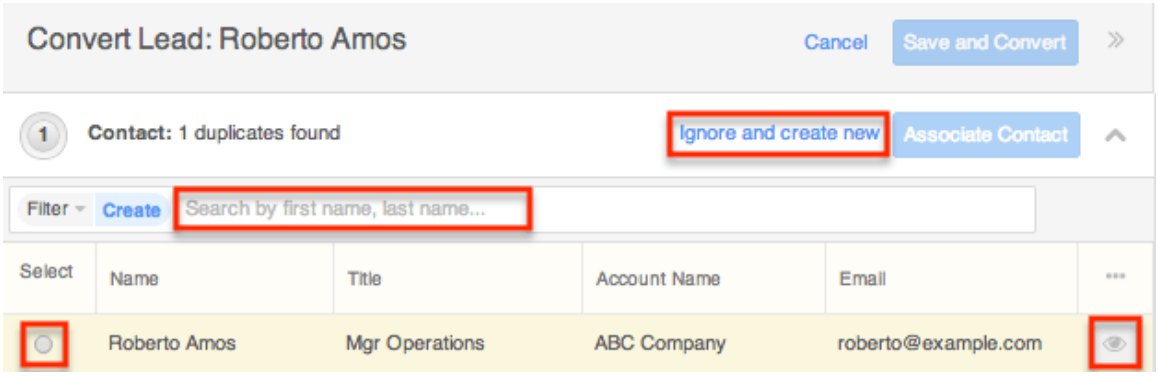
Sugar enables you to convert leads into contacts as you determine they qualify for your organization's definition of a contact (e.g. after an evaluation/qualification process or upon entering into business with the individual). When the lead is converted, a new contact record is created in Sugar with a relationship to the original lead record. The Convert Lead page also gives you the option to create an account and opportunity record. Please note that administrators have the ability to configure the Convert Lead layout via Admin > Studio to mark modules as required for conversion, add additional modules (e.g. Notes, Tasks, etc.) to the convert layout, remove modules, etc. For more information on configuring the convert layout, please refer to the Studio documentation in the Administration guide.

## Duplicate Record Check

Sugar automatically checks for any duplicate records (e.g. contacts) in the system when converting the lead. The Convert Lead page will display any Contact, Account, or Opportunity records that are detected as duplicates in a list view within the panels (Contacts, Accounts, Opportunities). Please note that the duplicate check feature is enabled by default in Sugar and cannot be disabled by administrators or users.

Note: In the Leads module, the duplicate check ignores leads that have a status of "Converted", allowing you to re-enter leads who may demonstrate interest more than once.

Users have the option to ignore and create a new record or select the existing record displayed on the Convert Lead page. In addition, the Search bar is available to search for existing records (Contacts, Accounts, etc.) to relate to the lead. For more information on performing searches, please refer to the Search documentation. The record view layout will open up on the Convert Lead page when creating a new record to associate to the lead. Please note that you can preview the duplicate record(s) by clicking the Preview icon to the far right of the record's row. Once a new record is created or an existing record is selected, click the Associate button ("Associate Contact", "Associate Account") on the upper right of the panel to relate the record to the lead.

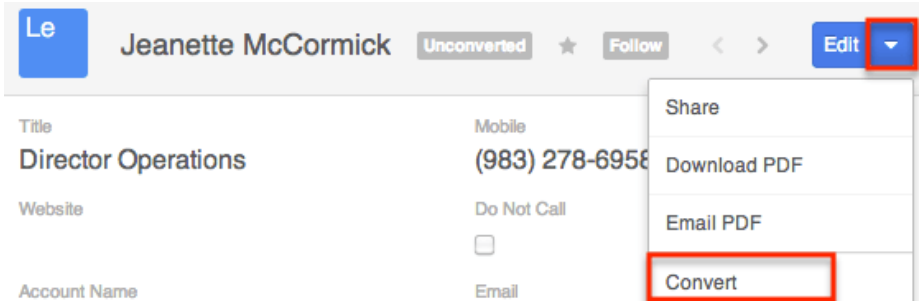



## Steps to Convert a Lead

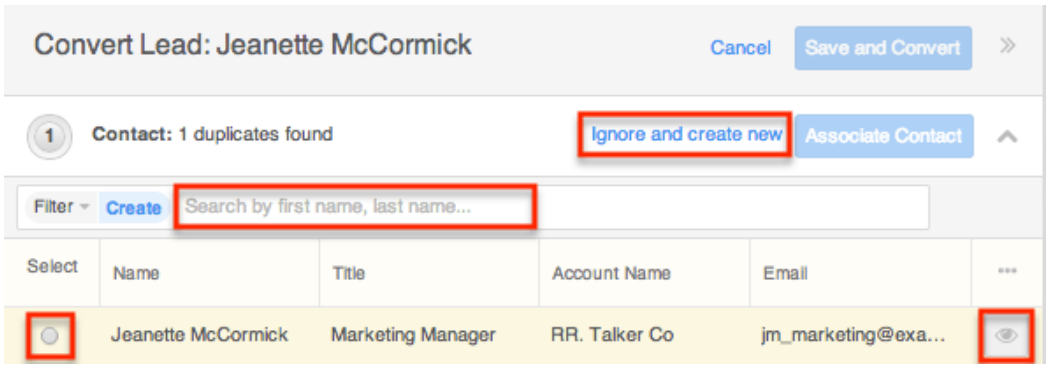
Once the lead has been evaluated and qualified, they are ready to be converted to a contact in Sugar. Please note that the panel (Contacts, Accounts) on the Convert Lead page must be completed and associated to the lead in order for the succeeding panels to open to associate to the lead record. Once a Contact, Account, or Opportunity record is associated to the lead, the corresponding panel will display a check mark to the left of the header.

The following steps cover converting a lead to a new contact and relating it to an existing account record as an example:

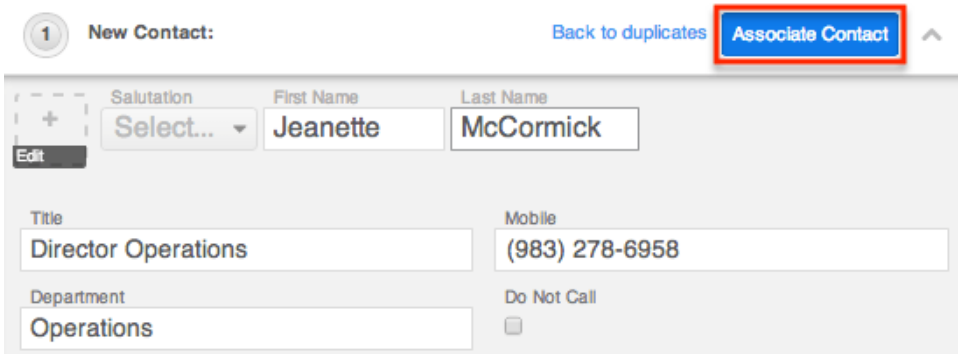
1. Navigate to a Leads record view.
2. Select "Convert" from the Actions menu.



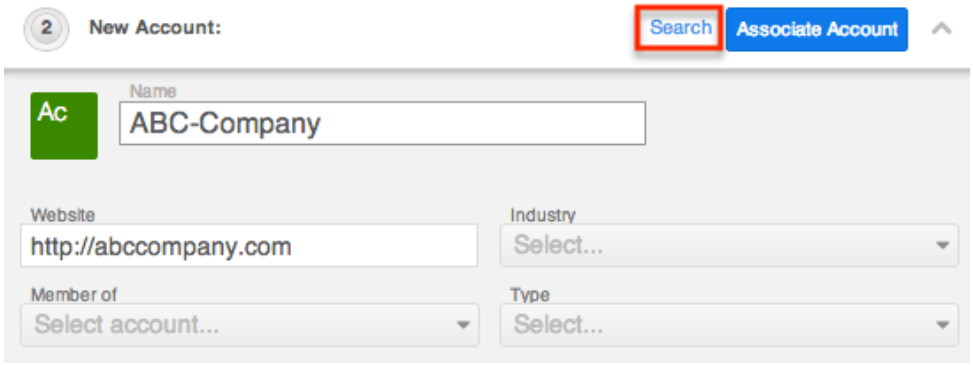

3. Sugar will perform a duplicate check for any existing contacts and accounts.
    - The duplicate records (if any) will be displayed in a list view within each panel (Contacts, Accounts, Opportunities).
    - Users have the option to ignore and create a new record or select the existing record displayed on the Convert Lead page.
    - You can also perform a search within the module to relate an existing record to the lead.
    - Note: You can preview duplicate records by clicking the Preview icon to the far right of the record's row prior to relating the record to the lead. For more information on previewing records, please refer to the Preview section of this documentation.



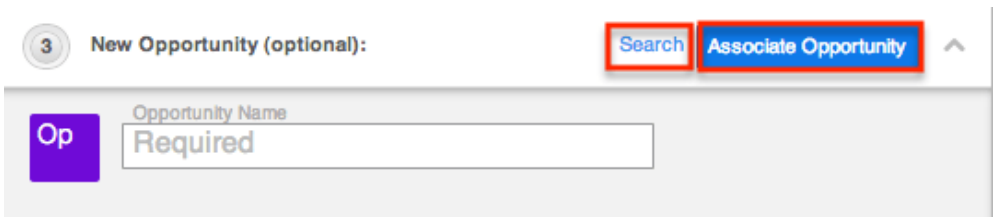

4. To create a new Contact record, click "Ignore and create new" and complete the record view panel. Click "Associate Contact" to relate it to the lead.



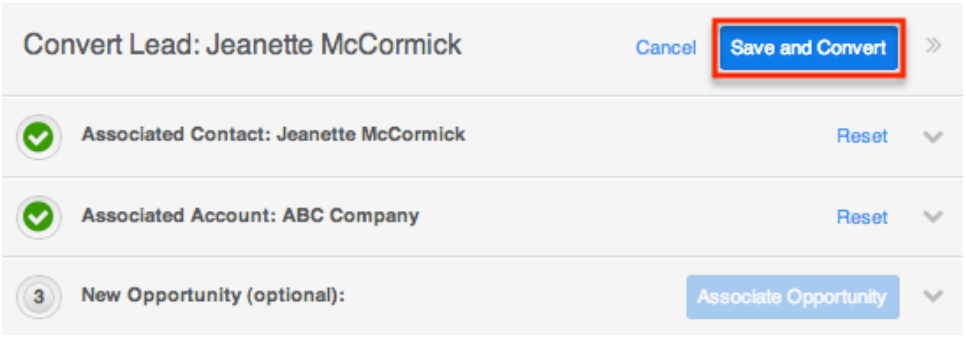

5. To relate an existing Account record, either select the duplicate record (if any) displayed in the Accounts panel or perform a search to relate an existing record. Click "Associate Account" to relate it to the lead.



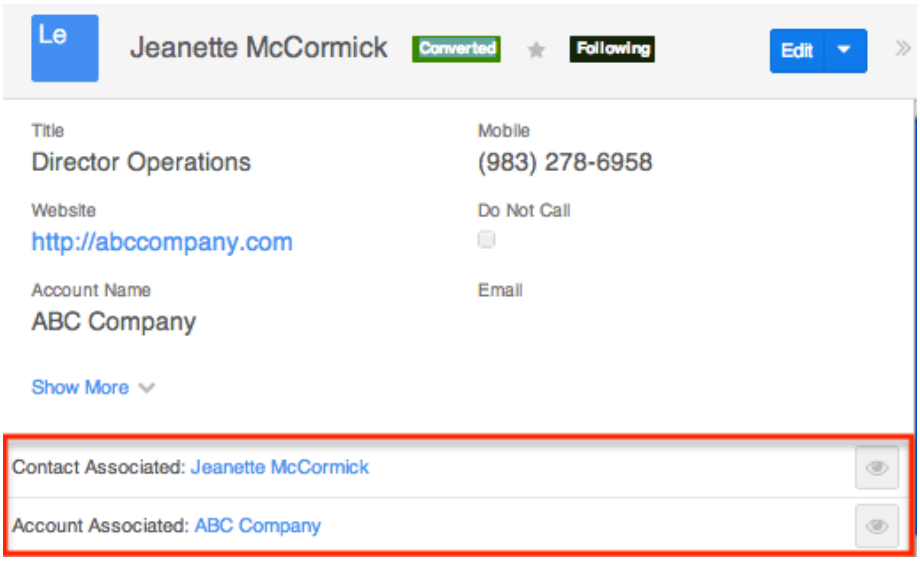

6. New or existing opportunity records can be related to the lead accordingly.
   - Note: If the Opportunity panel is marked as optional, then no opportunity is required to convert the lead. For more information on setting modules as required on the Convert Lead layout, please refer to the Studio documentation.




7. Once all of the necessary information is entered and the appropriate records created, click "Save and Convert".




The converted lead record will display the converted contact and account information below the lead record's detail. You can click the Preview icon to the right of each record to view the detail's of the converted record's. The lead conversion can only be performed once in Sugar and once a lead is converted the lead's status field will display "Converted". Please note that the status field becomes read-only upon conversion and cannot be manually changed for the lead.



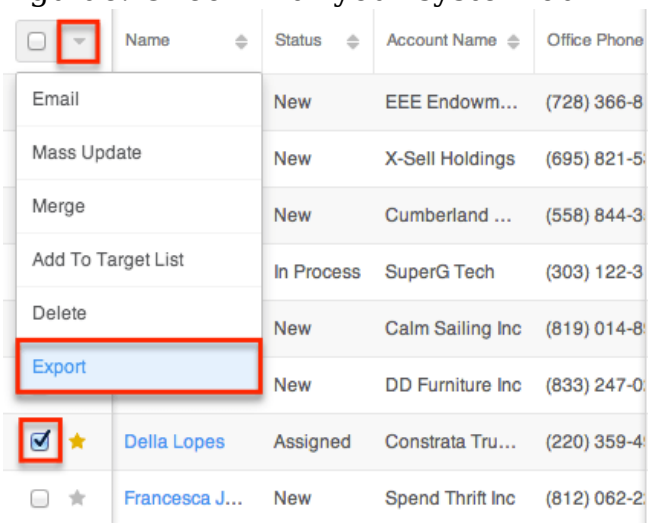

## Exporting Leads

Sugar's Export option allows users to download all fields for the selected leads to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Lead data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered leads back into Sugar. For more information on updating existing records via import, please refer to the Import documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of lead records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Leads may be exported from the Leads list view by selecting "Export" from the

Mass Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for leads and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.

Please note that your ability to export leads from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

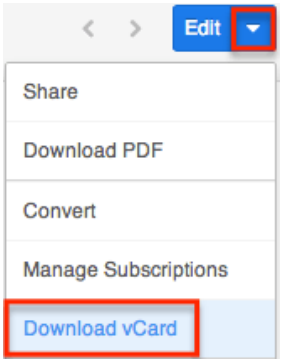



## Downloading a Lead's vCard

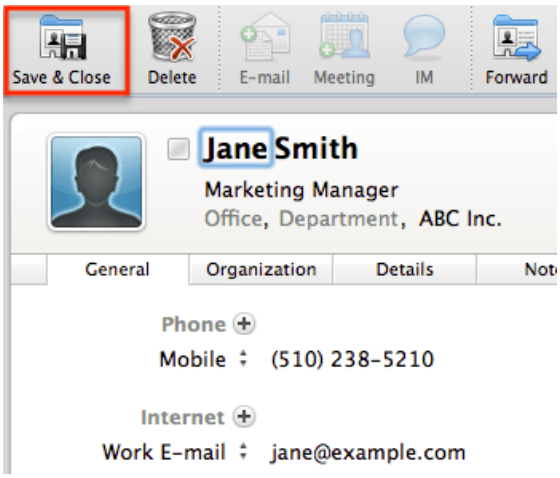
vCards are electronic business cards that are exchanged through applications such as email and web browsers. In addition to being able to create a lead from an existing vCard , you can also download a vCard from Sugar in order to transfer the lead's information to another application.

The following steps cover downloading a vCard and saving it as a contact in Microsoft Outlook as an example:

1. Navigate to a Leads record view.
2. Select "Download vCard" from the Actions menu to download the vCard file.




3. Open the downloaded file in your mail or address book application. For this example, double clicking opens the vCard in Outlook.
4. Make any necessary changes to the information, then click "Save & Close" to save this lead in Outlook.



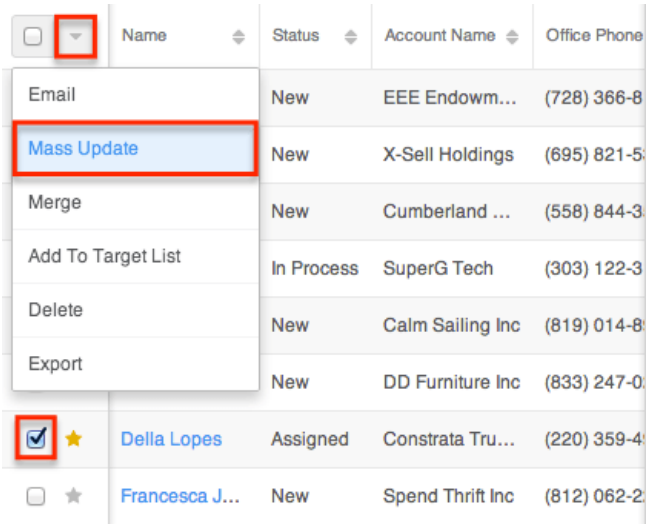

## Mass Updating Leads

Mass Updating allows users to make the same change to multiple lead records at once from the Leads list view. Users with administrator or developer level access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide.You can use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to update more than 1000 records or update a specific group of records on the list view, please use the filter option in module search to perform the updates in smaller batches.

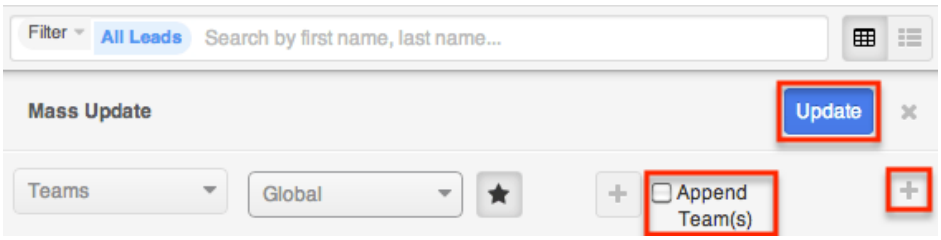
Please note that your ability to mass update leads may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

Use the following steps to mass update lead records from the list view:

1. Navigate to the Leads list view by clicking the Leads module tab.
2. Use the list view's Module Search to identify leads you wish to modify.
3. Select the desired leads then choose "Mass Update" from the Mass Actions menu.




4. The Mass Update panel will appear below the search bar. Set values for the field(s) you wish to alter.
    - To add additional fields for mass update, click the Plus icon to the right of the dropdown list.Note: For the Teams field, mark "Append Team(s)" to add the teams specified here to any existing team assignments. Not marking the checkbox will replace the existing team assignment with the new one.




5. Click "Update" to save the changes to all of the currently selected lead records.

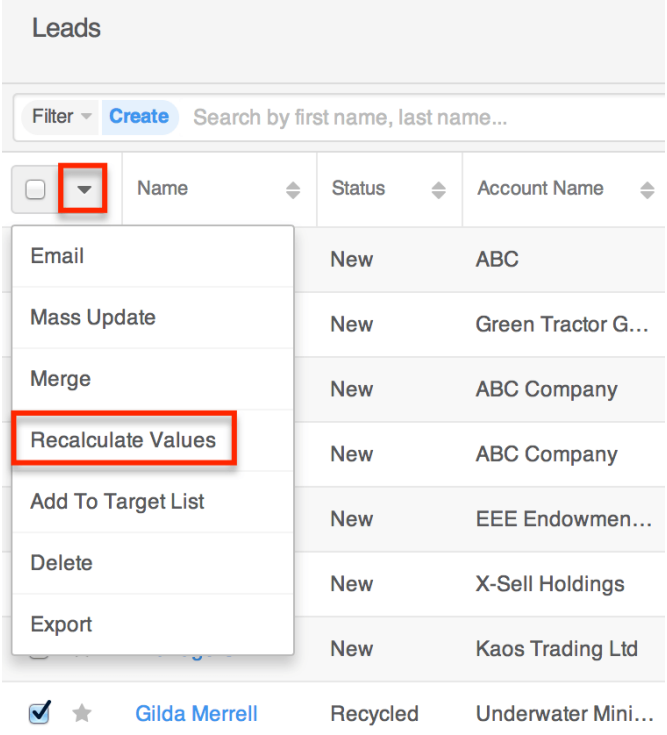
## Recalculating Calculated Values

This feature allows calculated values to be recalculated following the addition or alteration of a calculated field in Studio. For more information on calculated fields, please refer to the Studio documentation in the Administration guide. Sugar allows you to select up to 1000 records at a time for recalculating values. If you desire to recalculate values for more than 1000 records, you will need to perform the recalculation in several batches.

Note: This action will not appear unless the user is an Admin or has developer-level access to the module and if there is at least one calculated value in that module. Please note that your ability to recalculate values may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Recalculate Values option.

The following steps cover recalculating values for records from the Leads list view as an example:

1. Navigate to the Leads list view by clicking the Leads module tab.
2. Use the list view's Module Search to identify leads you wish to update.
3. Select the desired leads then choose "Recalculate Values" from the Actions menu.




## Finding Duplicate Leads

Between multiple users working in Sugar, importing new records, and converting leads, it is possible for duplicate lead records to be accidentally input to the system. Before creating a new lead record, a good practice is to first check that the lead does not already exist in Sugar. You can locate duplicate records for cleanup using module search from the Leads list view. Searching for leads with similar names or other information can turn search into a powerful, duplicates-finding tool. Sugar also provides a wizard for finding potential duplicates that is available from the Leads record view and may be used as shown below. If duplicate lead

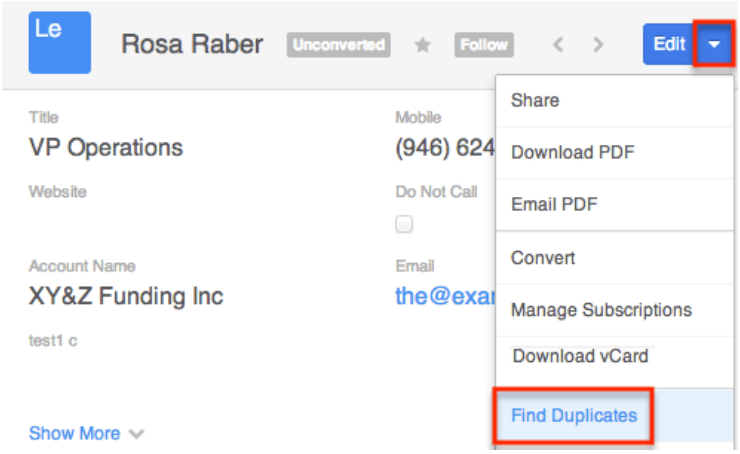
records are detected, you can perform a merge per the Merging Leads section of this documentation.

Note: In the Leads module, the duplicate check ignores leads that have a status of "Converted", allowing you to re-enter leads who may demonstrate interest more than once.

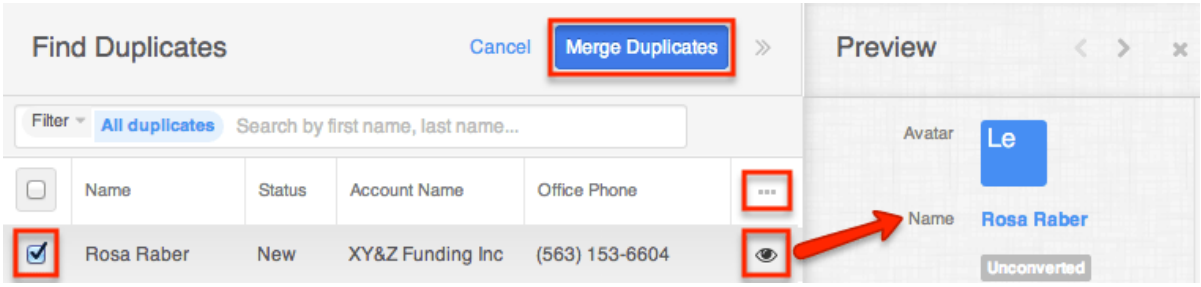
Please note that your ability to use the Find Duplicates action may be restricted by any role which prevents lead deletion. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Find Duplicates option.

Use the following steps to locate duplicate leads using the Find Duplicates option from the Leads record view:

1. Navigate to an lead's record view.
2. Choose "Find Duplicates" from the Actions menu.




3. Potential duplicate lead records will be listed on the Find Duplicates page. Select the duplicate record(s) you wish to merge then click "Merge Duplicates".
    - You can preview the duplicate record's details by clicking the Preview button to the far right of the records row.
    - You can search for specific records from the Leads list view if you wish to check for more possible duplicates. For more information on performing a search, please refer to the Module Search section of this documentation.
    - You can also click the Column Selection icon above the Preview button to change the list of fields that display on the list view column headers.




Once you click "Merge Duplicates", the merging process with the current record will begin. For instructions on performing the merge that follows, please refer to Steps 3-9 of the Merging Via List View section of this documentation.

# Merging Leads

When duplicate records are identified in Sugar, you have the option to merge two or more duplicate leads into a single record. Once the merge is complete, the duplicate lead record(s) will be deleted, and the primary record will remain. Please note that all relationships belonging to the duplicate leads will be merged to the primary record meaning that any calls, meetings, etc. related to the duplicate lead record(s) will automatically be related to the resulting, merged lead record.

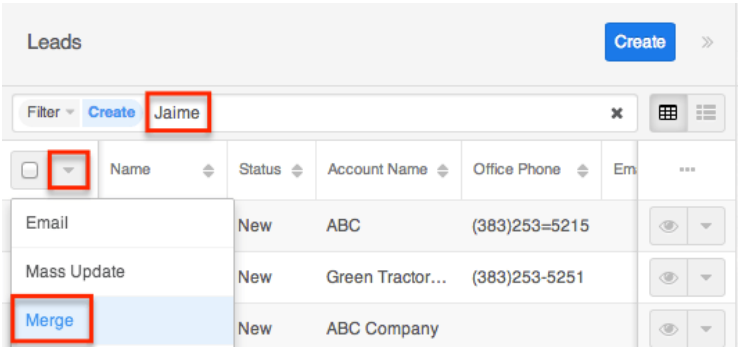
Note: Date Created, Date Modified, and Password field types are not supported when merging duplicate records in Sugar.

## Merging Via List View

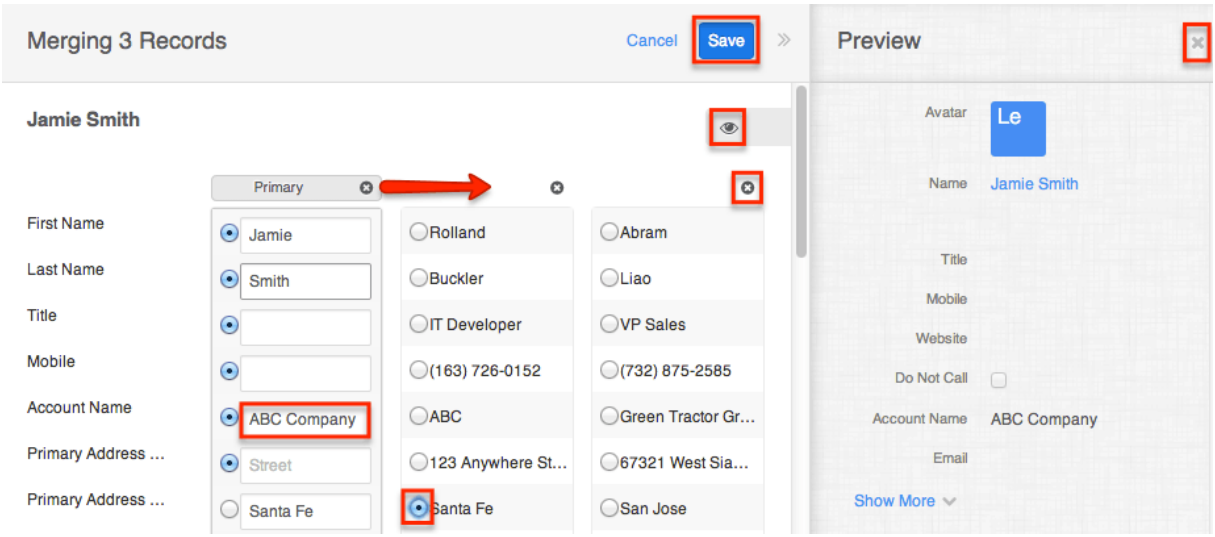
Module Search may be used to identify duplicate leads by, for example, searching for leads with similar names. Once your search has identified duplicate leads, you can merge them directly from the Leads list view.

Use the following steps to merge leads via the list view:

1. Use the list view's Module Search to identify duplicate leads.
2. Possible duplicates will be displayed in the list view. Select the duplicate record(s) that you wish to merge..
    - Please note that up to five records may be merged at once in Sugar. An error message ("Invalid number of records passed. The valid range is from 2 to 5 records.") will appear if more than five records are selected when attempting to perform a merge.




3. Select "Merge" from the Actions menu to display the Merging Records page. The primary record's field values are displayed on the left while other record's values are in columns to the right. For convenience, fields with differing values will appear on the top of the list. Saving the merge will preserve only the field values marked with the radio button into a single record.




4. If three or more records are selected to be merged, an X icon will appear at the top right of each record. Clicking the "X" will remove the record from the merge process but will not delete the record.
5. To change which record is considered the primary, drag and drop the Primary label on the top of a different column.
6. Review the field values in each column and click the radio button to the left of the value that should appear on the final record. You can also manually type or select a new value for any field as necessary.
    - Note: Fields you do not have Edit access for cannot be edited on the merging records page.
7. Preview what the final, merged record will contain as you work by clicking the eye icon to display the preview in the Intelligence Pane.
8. Click "Save" once all fields you wish to appear on the single, merged record have their radio buttons selected.
9. A pop-up message will display confirming that the duplicate record(s) should

be deleted. Click "Confirm" to proceed.

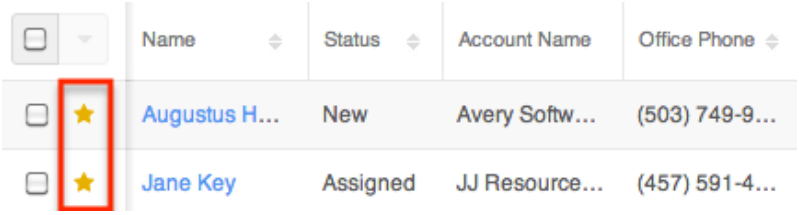
## Favoriting Leads

Each Sugar user has the option to designate their own favorite leads which are important or will be viewed often so that they can easily be accessed via search or from the Leads module tab. Once records are marked as favorites, select "My Favorites" from the Filter option next to the Search bar to retrieve your favorites or select from your most recent favorites directly from the Leads module tab .

### Favoriting Via List View

Use the following steps to mark records as favorites via the Leads list view:

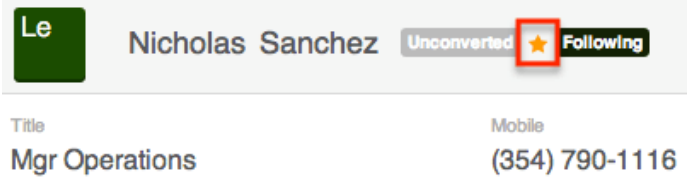
1. Navigate to the Leads list view by clicking the Leads module tab.
2. Use the Module Search to find the Lead records you wish to mark as favorites.
3. Mark the star icon on the left of each desired lead's row.
4. To remove the lead as a favorite, click the star again to revert it to white.




### Favoriting Via Record View

Use the following steps to mark records as favorites via the Leads record view:

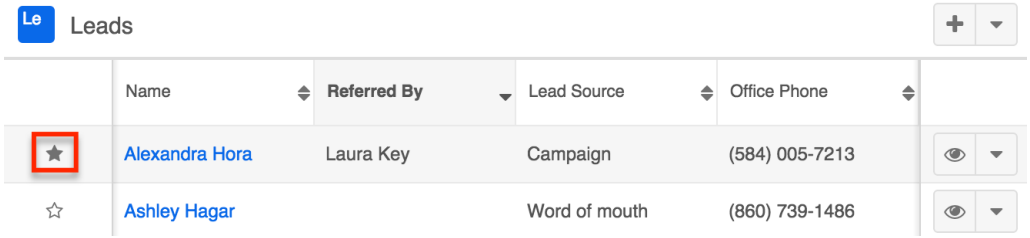
1. Navigate to a lead's record view.
2. Click the star icon to the right of the lead's name in the upper left of the record view to designate it as a favorite.
3. To remove the lead as a favorite, click the star again to revert it to white.



### Favoriting Via Subpanel

Use the following steps to mark lead records as favorites via the subpanel in related modules:

1. Navigate to a related module's record view.
2. Click the star icon to the left of the desired record's row in the Leads subpanel.




3. To remove the lead as a favorite, click the star again to revert it to white.

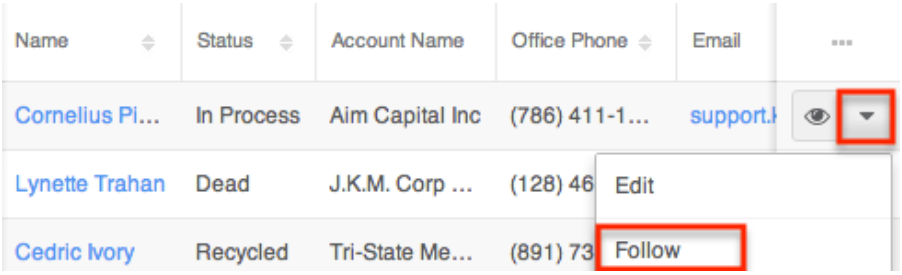
## Following Leads

Users can also choose to follow specific lead records to which they have access to in Sugar by clicking the Follow button (If grayed out) to the right of the lead's name. This allows each user to personalize their activity stream by specifying which records' posts should appear on the activity streams displayed on their Home page and Leads list view. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. Should a user lose access to a record in Sugar, they will automatically stop following that record.

### Following Via List View

Use the following steps to mark a record to follow via the Leads list view:

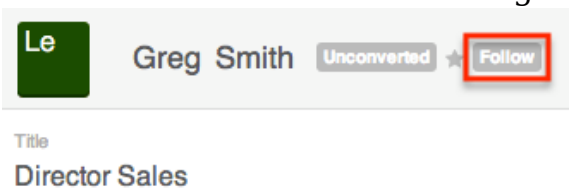
1. Navigate to the Leads list view by clicking the Leads module tab.
2. Use the Module Search to find the Lead records you wish to follow.
3. Click the Record Actions menu to the far right of the records row and select "Follow".
4. To unfollow the lead, click the Record Actions menu then select "Unfollow".



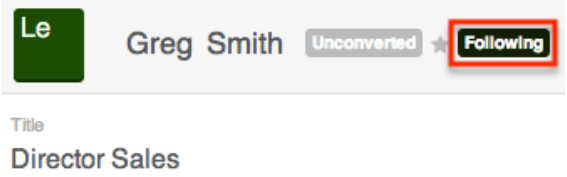

### Following Via Record View

Use the following steps to mark a record to follow via the Leads record view:

1. Navigate to a Leads record view.
2. Click the Follow button to the right of the leads name.

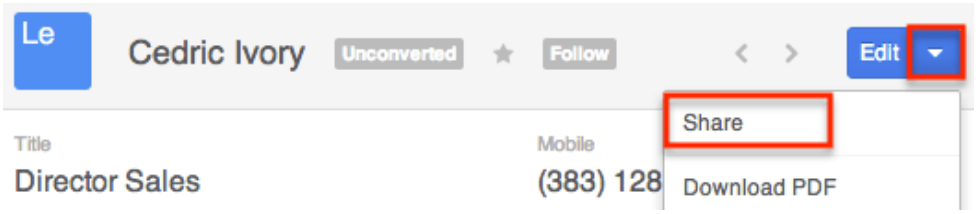



3. To unfollow the lead, click the Follow button again to revert it to gray.




## Sharing Leads

Individual lead records can be shared with other users in your organization by sending an email with the record's link directly from the record view. In the Leads record view, select "Share" from the Actions menu which will open a Compose Email window including the URL of the lead record. Enter the recipient(s) email address in the To field then click "Send".

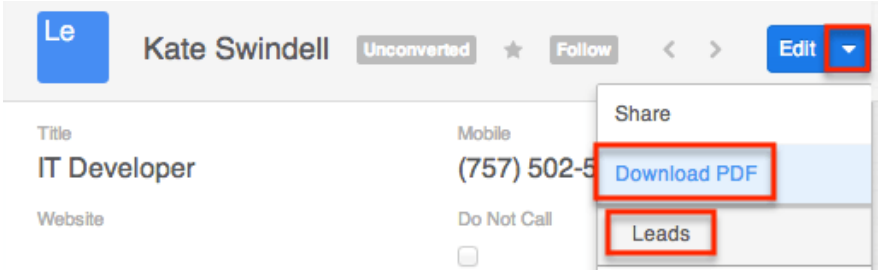



Users can simply click the link in the email to access the lead record in Sugar. Please note that the user must be logged into Sugar in order to access the record. Users will only be able to view the shared record as allowed by their team

membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

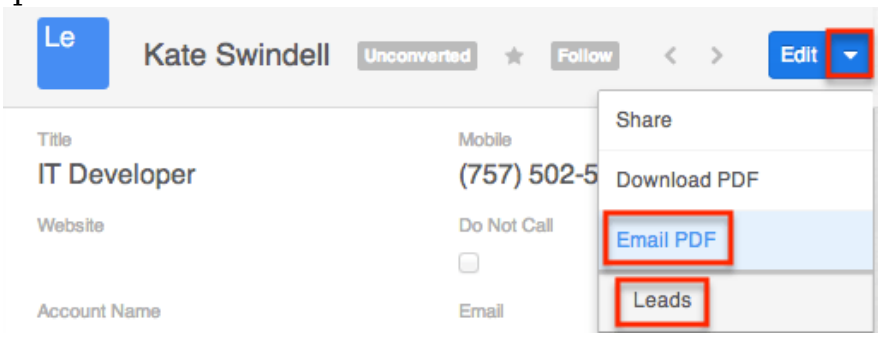
## Downloading Lead Information as a PDF

Users have the option to download lead information as a PDF file via the Leads record view by clicking the Actions menu and selecting "Download PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Download PDF option in the Actions menu. Simply select one of the templates to generate the PDF file to view or save onto your local machine. Please note that the Download PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.



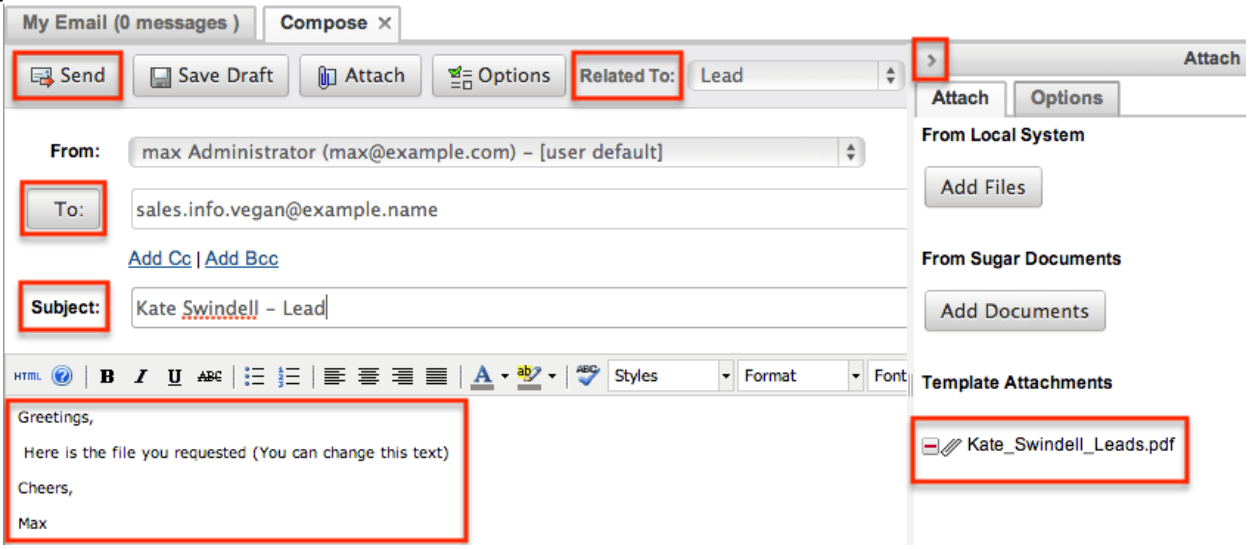

## Emailing Lead Information as a PDF

Users also have the option to email lead information as a PDF file using any of the available Leads module templates using Sugar's email client. Simply click the Actions menu and select "Email PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Email PDF option in the Actions menu.




Select one of the templates to open a Compose window in the Emails module. The email's To field will automatically populate with the email address of the lead

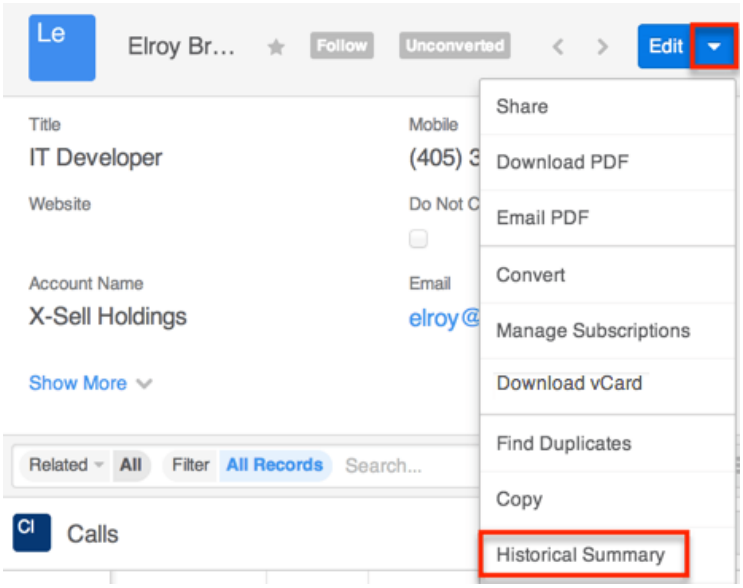
record, and the Subject field will display the lead's name. The email is automatically related to the lead record, and the chosen lead PDF will be attached. You can update the fields as necessary and enter a body for the email message then click "Send". For more information on sending emails via the Emails module, please refer to the Emails documentation.




Please note that the Email PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.

## Viewing Activities' Historical Summary

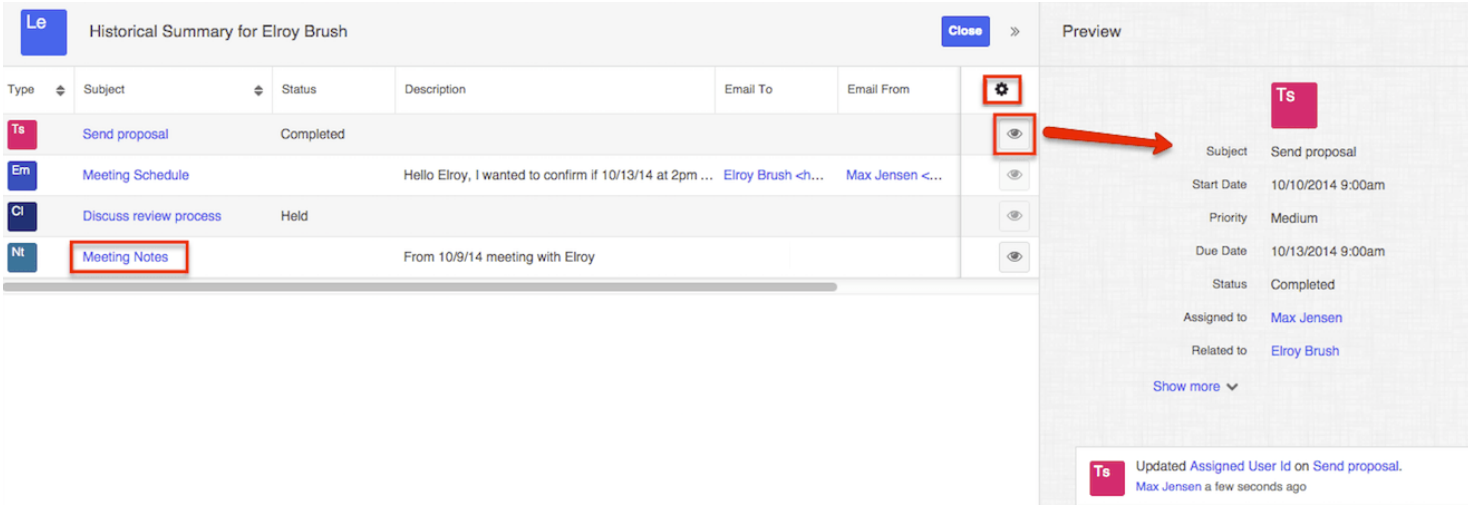
Users can easily view quick details for the various related activities (e.g. calls, meetings, notes, emails, etc.) that have taken place via the Historical Summary option. Simply navigate to the lead's record view and select "Historical Summary" from the Actions menu to view the historical activities related to the lead in one place.




The Historical Summary page will display each activity's type, subject, status, description, date modified, etc. and you can simply click the activity's name to view the full details for each activity. Please note that you can add Date Created and User fields by clicking the Column Selection icon to the far right of the list view column headers. You can also preview the activity record via the intelligence pane by clicking the Preview icon to the far right of each record's row. It will provide users with key information regarding the record as well as the related activity stream information (if any). For more information on activity streams, please refer to the Activity Streams documentation. Please note that preview is only available for modules (e.g. Task, Note) using the Sidecar user interface.

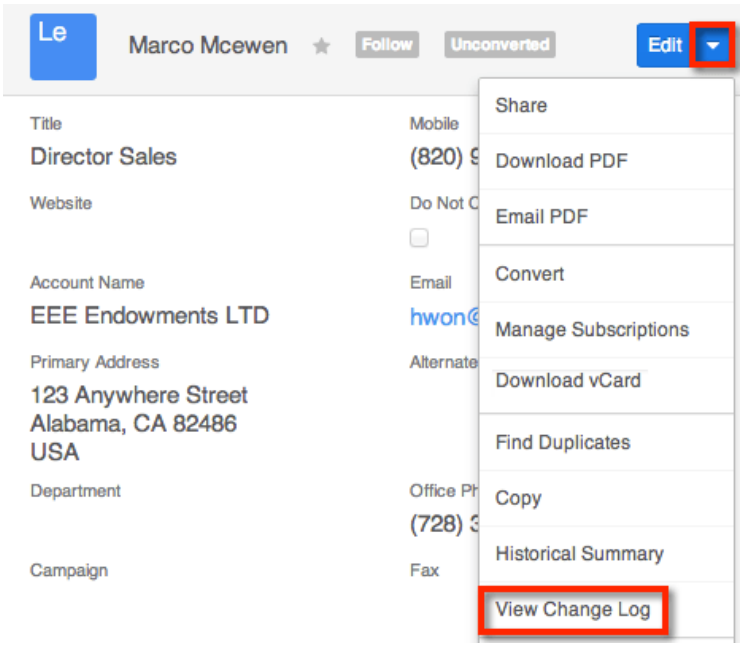
The historical summary list view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the system's default column order.

Users can also easily adjust the size of columns in the historical summary list view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the Historical Summary list view is different from the default column width.

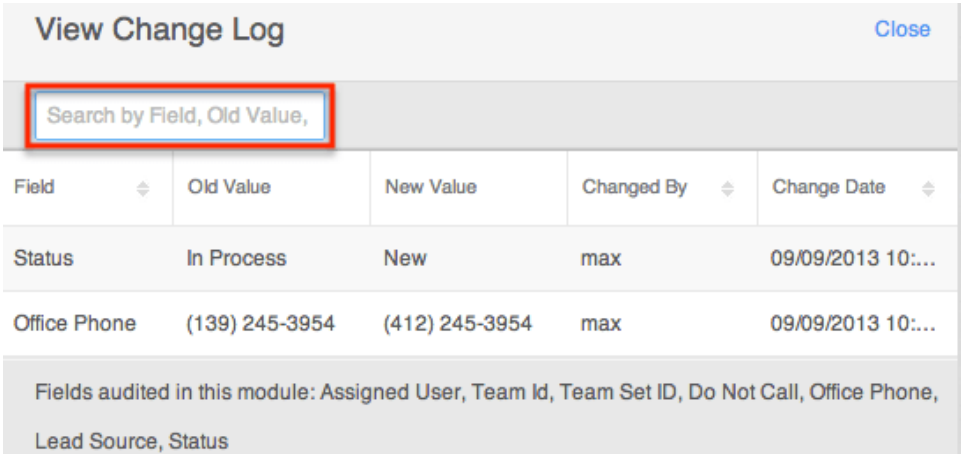



## Viewing Lead Change Logs

Changes made to each lead record are tracked over time, and users are able to view the history of changes via the change log in each lead's record view. To view the change log, navigate to a lead in record view and select "View Change Log" from the Actions menu. Please note that only fields marked as "Audit" in Admin > Studio will be displayed in the change log. For more information on designating for audit, please refer to the Studio documentation in the Administration guide.




Once the change log opens, you can view the details of historical changes and can search by field name, old value, etc. by entering the keyword into the search box.



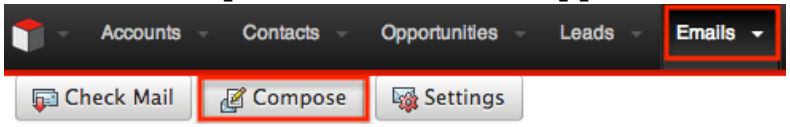

# Emailing Leads

Sugar allows users to compose and send outbound emails to leads. There are various ways to send outbound mail to leads including emailing via the Emails module, Emails quick compose, Leads module, campaigns, and workflows. Please note that administrators in Sugar must first configure the outbound mail server for the system via Admin > Email Settings in order for users to send outbound emails. For more information on setting up the system email settings, please refer to the documentation in the Administration guide. Users will also need to have their email settings configured in their user preferences prior to sending outbound email from the Emails module, Emails quick compose, or Leads module. For more information on setting up your user preferences' email settings, please refer to the

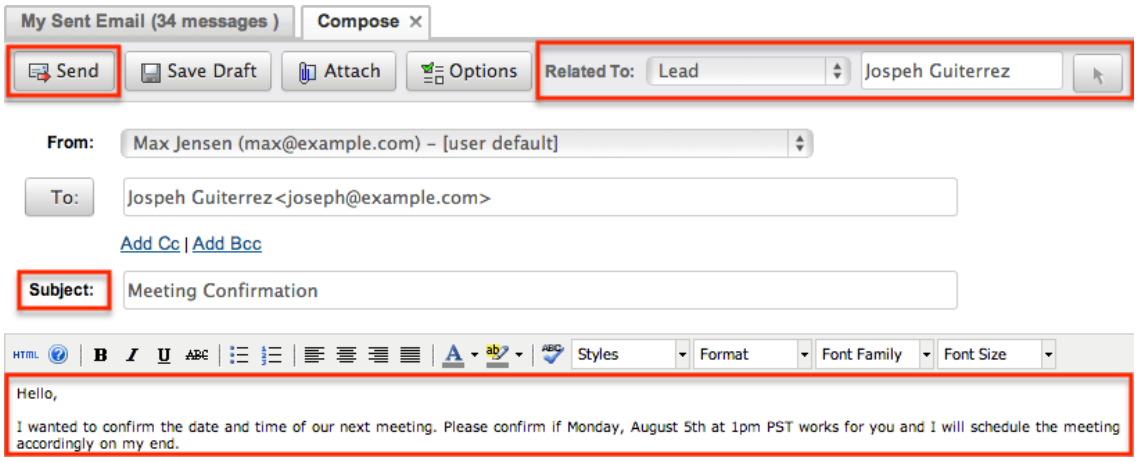
## Emailing Via the Emails Module

Use the following steps to compose and send an email to a lead via the Emails module. For more detailed information on sending emails via the Emails module, please refer to the Emails documentation.

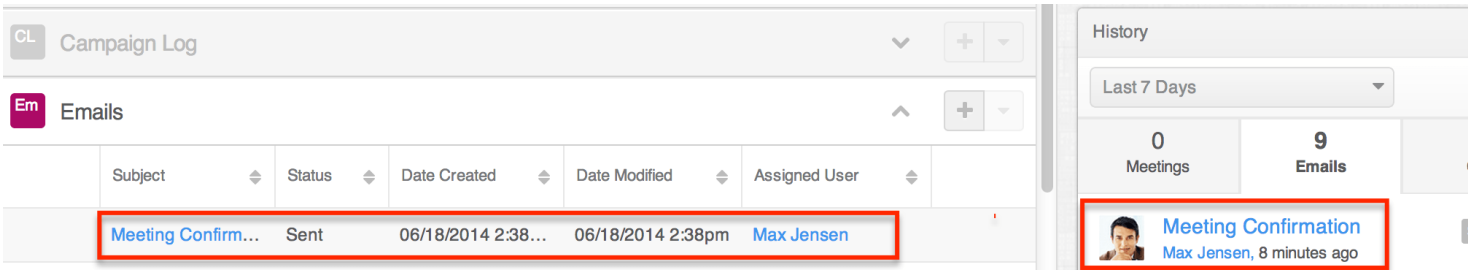
1. Navigate to the Emails module by clicking the Emails module tab.
2. Click the Compose button on the upper left of the Emails module.




3. For the "Related To" field, select "Leads" as the module, then enter or select the desired lead's name. The email's To field will automatically populate with the name and email address of the selected lead record.
4. Enter a subject and body for the email message, then click "Send".



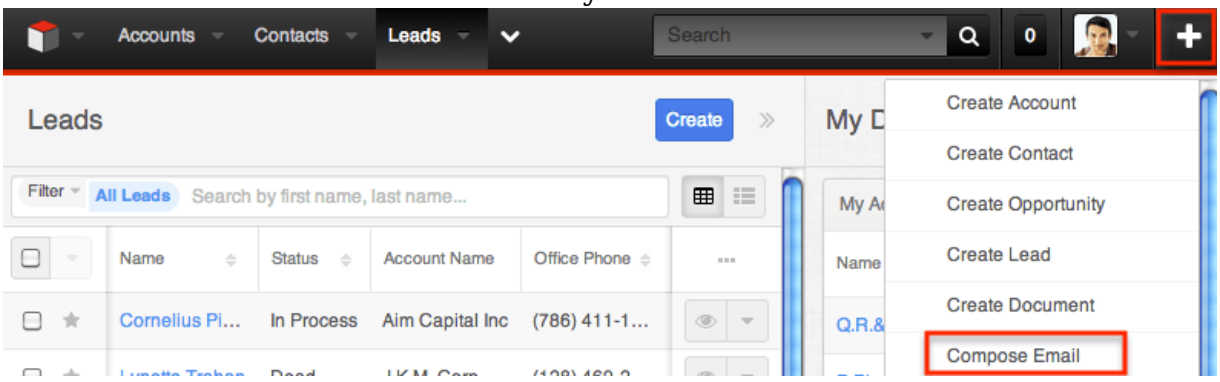

Once the email is sent successfully, the email record will appear in the History dashlet and Emails subpanel on the lead's record view.




## Emailing Via Quick Compose

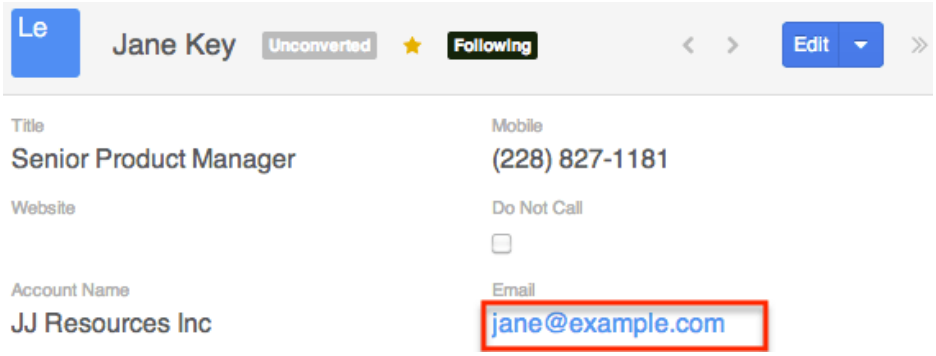
The quick compose option allows users to compose emails from various places in Sugar without navigating away from the current page.

While viewing a lead record, you can select "Compose Email" from the Quick Create menu on the top right of any Sugar page. Once the Compose Email form opens, you can manually enter the email address or click the Address book button to the right of the To field to select the lead you wish to send the email. Please note that the email will automatically be related to the lead record.

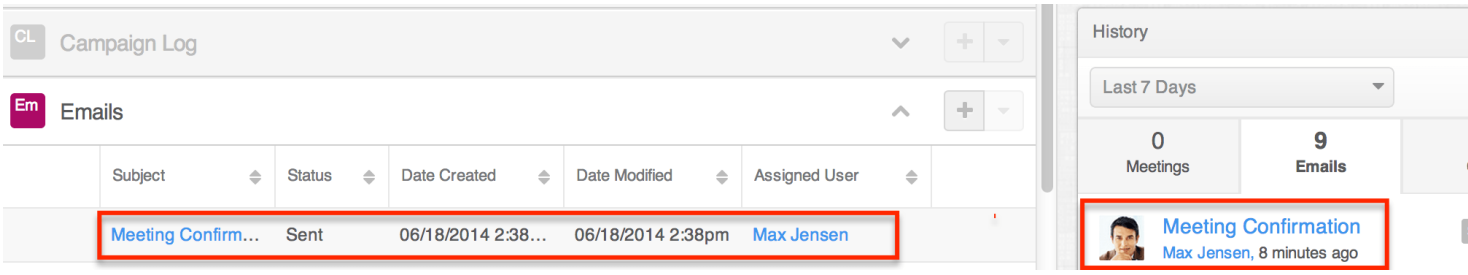



Users can also use Quick Compose by clicking a lead's email address anywhere it

is displayed as a link. Clicking the email address automatically populates the To field with the lead's name and relates the email to the lead record.




Once the email is sent successfully, the email record will appear in the History dashlet and Emails subpanel on the lead's record view. For more detailed information on sending emails via quick compose, please refer to the Emails documentation.

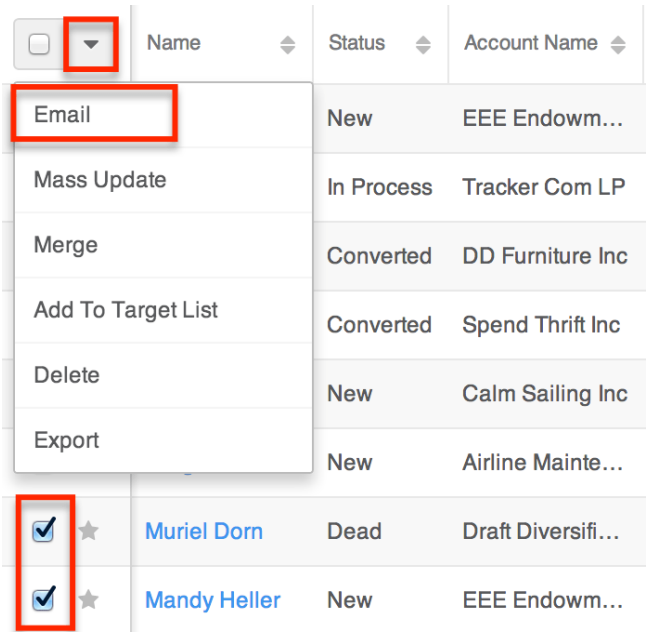



## Emailing Via Leads List View

One or more leads may be emailed at a time from the Leads list view simply by selecting the Email option from the Actions menu.

Use the following steps to compose and send an email from the Leads list view:

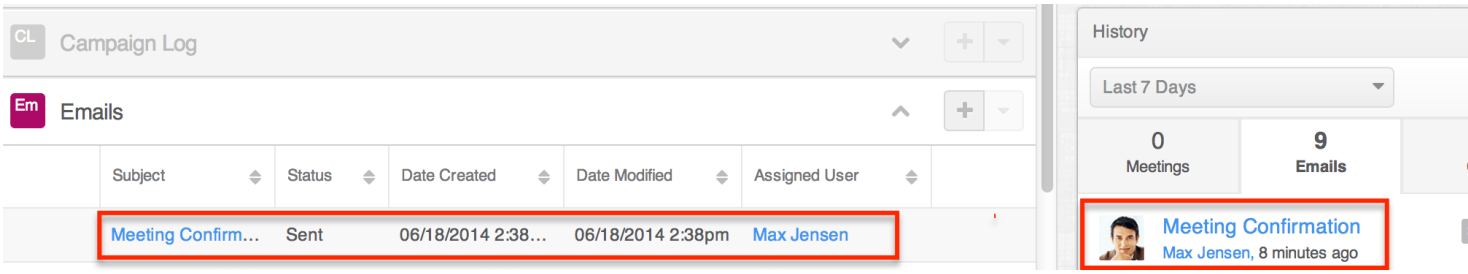
1. Navigate to the Leads list view by clicking the Leads module tab.
2. Use the Module Search to find the Lead records you wish to include on the email.
3. Select the desired leads then choose "Email" from the Actions menu.




4. In the Compose Email window, enter the subject and body of the email message, then click "Send".

- Note: The email's To field will automatically populate with the name of the selected lead record(s).

Once the email is sent successfully, the email record will appear in the History dashlet and Emails subpanel of each lead record.




## Emailing Via Campaigns

Sugar's Campaigns module can be used to create email and newsletter campaigns to send mass emails to a relevant set of leads. Email-type campaigns are mass emails sent to a target list while newsletter-type campaigns are a series of mass emails sent to a consistent or growing target list periodically or on a regular basis. For more information on sending mass emails to leads via a campaign, please refer to the Campaigns documentation.

## Emailing Via Workflows

Sugar's Workflow module enables you to automate tasks, send email alerts, and execute various actions. With each workflow, a set of conditions trigger a combination of actions and email alerts potentially including alerts to lead records. You also can create alert email templates used by workflows to insert relevant data to the automated email notifications. For more information on workflow email notifications, please refer to the Email Alert section of the Workflows documentation.

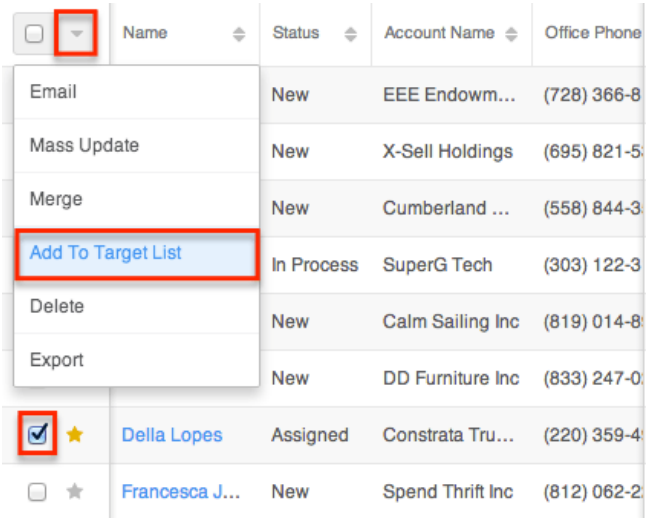
## Adding Leads to a Target List

A target list consists of a group of individuals or organizations you wish to be included or excluded on a mass marketing campaign. These targets are typically identified based on a set of predetermined criteria such as being a prospect or existing customer, age group, industry, etc. There are various ways to add leads to a target list in Sugar including using the Add to Target List option from the Lead list view's Actions menu. For more information on target lists and other methods of adding leads, please refer to the Target Lists documentation.

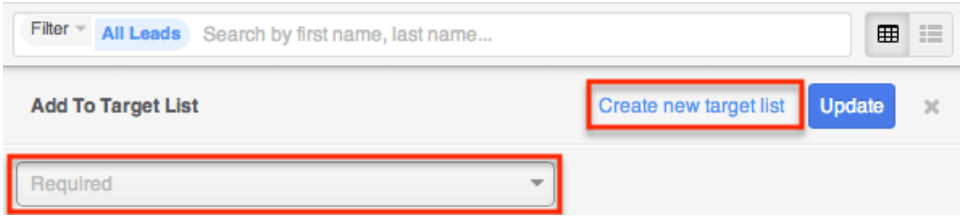
You can use the Select All feature in the list view when adding to a target list, which will allow you to easily select the first 1000 records in the result set. If you wish to add more than 1000 records or add a specific group of records to the target list, please use the filter option in module search to perform the additions in smaller batches.

The following steps cover adding lead records to a target list via the Leads list view as an example:

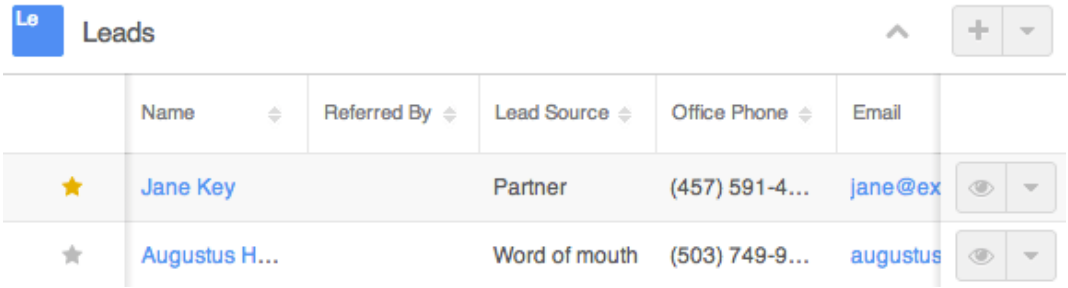
1. Navigate to the Leads list view by clicking the Leads module tab.
2. Use the Module Search to find the Lead records you wish to add to a target list.
3. Select the desired lead records then choose "Add to Target List" from the Mass Actions menu.




4. Below the Leads search bar, locate and select the desired target list in the dropdown list or click "Create Target List" to add to a new target list. Click "Update" to add the record(s) to the new or existing target list.




In order to view the leads that have been added, you can navigate to the Target Lists module. Click the target list's name to enter the record view, and you will see the lead records within the Leads subpanel.



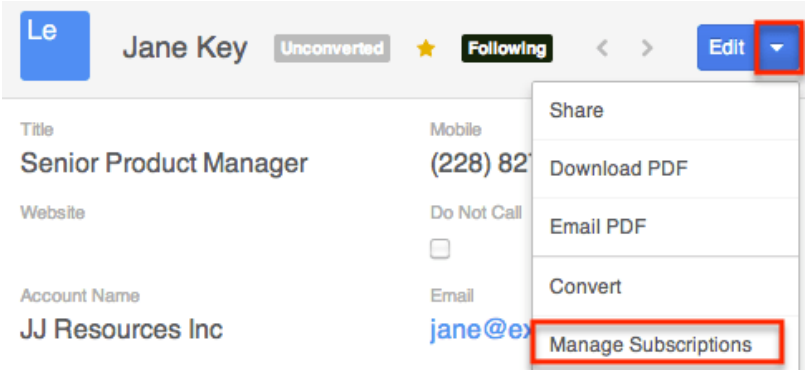

## Managing Lead Subscriptions

Leads who receive newsletter-type campaign emails from your Sugar instance are considered subscribers to that newsletter. Users can manage these newsletter subscriptions from the Leads record view using the Manage Subscriptions option in the Actions menu. Please note that you can only manage subscriptions for newsletter-type campaigns. A newsletter campaign you have created will have one or more default-type target lists. Leads are added to these target lists in order to receive your newsletter. The Manage Subscriptions option allows you to add a lead to the default-type or suppression-type target lists of your newsletter campaigns

without leaving the Leads module. For more information on newsletter subscriptions, please refer to the Campaigns documentation.

Use the following steps to manage lead subscriptions via a lead's record view:

1. Navigate to a lead's record view.
2. Select "Manage Subscriptions" from the Actions menu.




3. To add the lead 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. This will add the lead to the campaign's default target list.
4. To remove the lead from the newsletter subscription mailing list, select the newsletter from the Newsletters Subscribed To list and drag it to the Available/Newsletters Unsubscribed To list. This will add them to the suppression-type unsubscription target list for the newsletter campaign which will prevent the lead from receiving the newsletter. Please note that the lead will not be removed from the campaign's default target list.

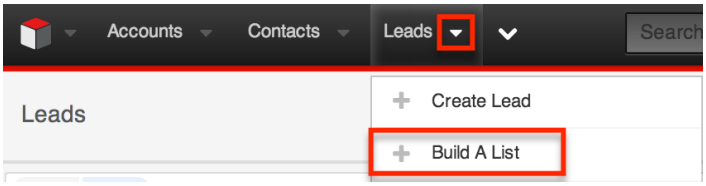



5. Click "Save" to preserve your changes.

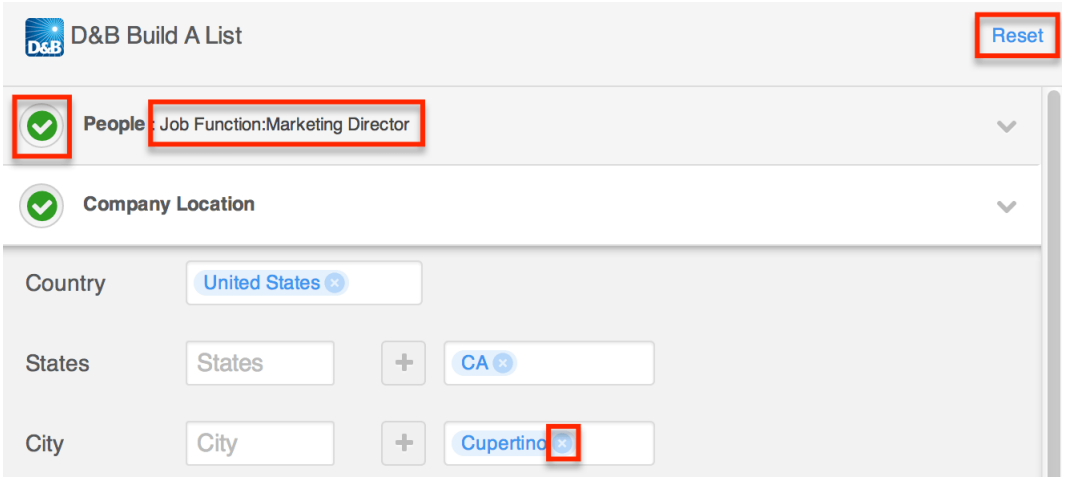
## D&B Build A List

D&B's Build A List option allows you to create a list of individuals for import based on various search filter criteria (e.g. people, company location, industry, etc.). The individuals meeting your search criteria will be pulled from the D&B database and displayed in the intelligence pane to the right of the page. You can easily import and save any of the individuals in the list to Sugar by selecting the individual's name. You can select the people-type module (Contacts, Leads, Targets) to which

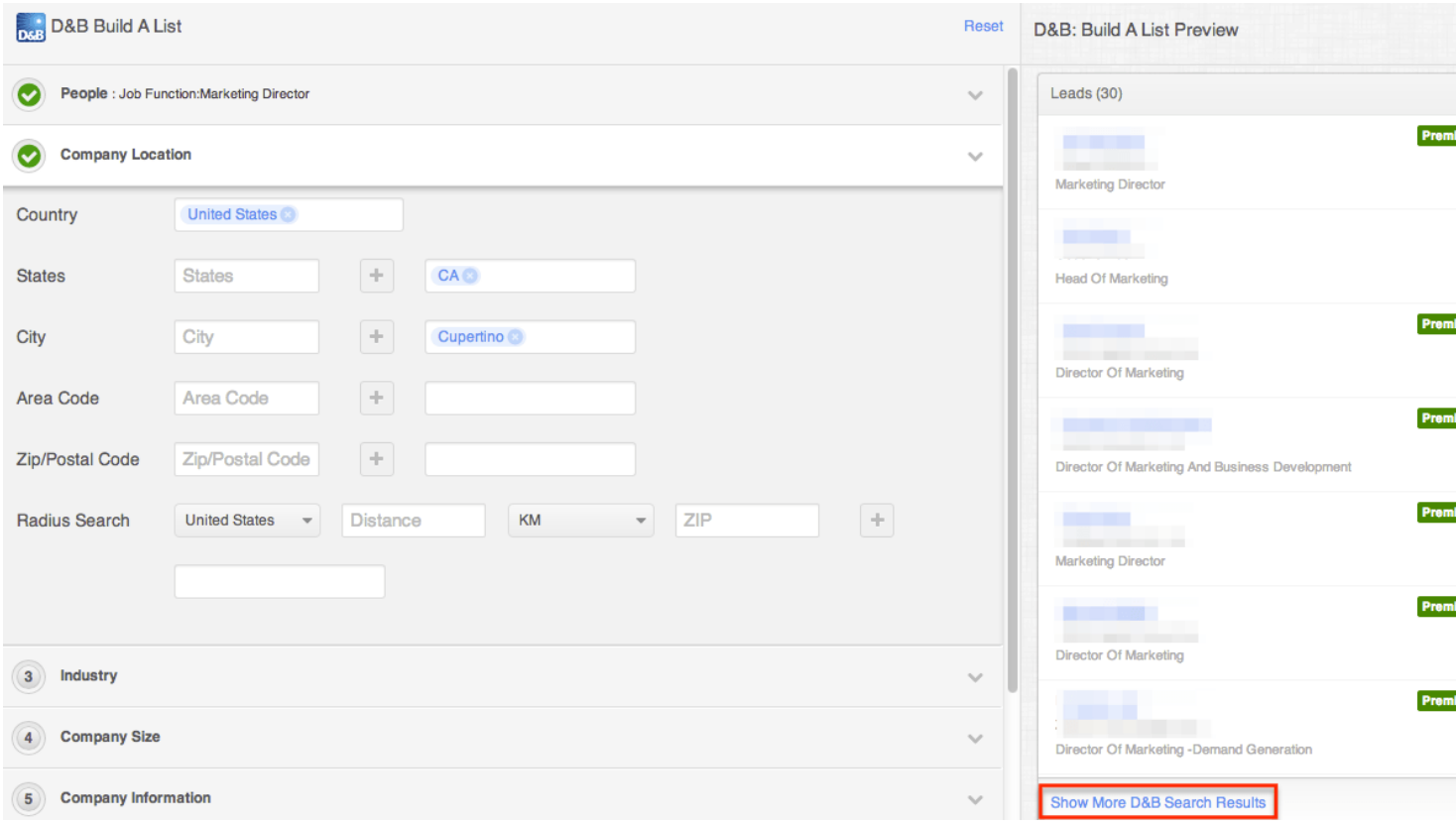
you wish to import the individual by selecting the Import As option on the upper right of the D&B: Lead Information dashlet. To build your list, simply click the triangle in the Leads module tab and select "Build A List". Please note that administrators must configure the D&B connector via Admin > Connectors before users can utilize the Build A List page to create filters, view, and import data into Sugar. For more information on enabling connectors, please refer to the Enabling Connectors section of the System documentation in the Administration guide.



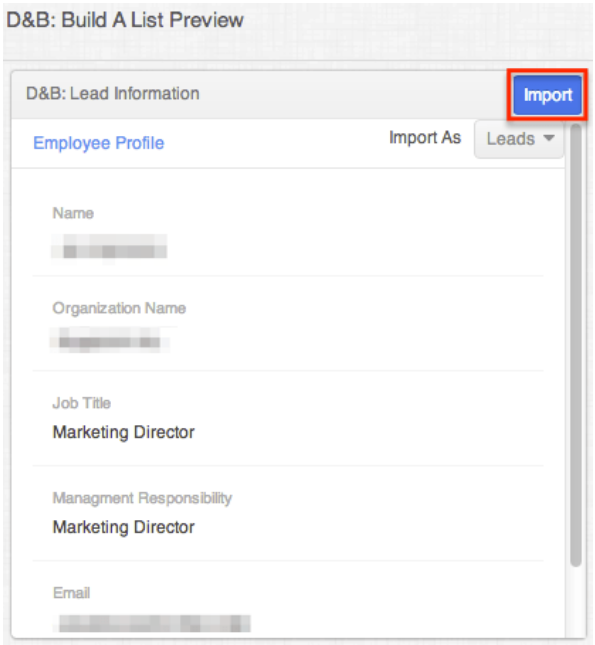

The D&B Build A List page will open displaying the various panels (e.g. People, Company Location, Industry, etc.) available to create your filter criteria. Once you enter at least one filter criterion in the corresponding panels, the panel will display a check mark to the left of the header. The panel you are currently viewing (e.g. People) will collapse as you open up a different panel (e.g. Company Location) on the page. Each collapsed panel will display a summary of filters (if applicable) created for the search. You can remove any unnecessary filter values by clicking the "x" to the right of the specific value or clicking "Reset" on the upper right of the page to clear all filters.




The D&B: Build A List Preview dashboard to the right of the page will display search results in real time as you enter the various search filter criteria. Only individuals meeting all of the search criteria across all panels on the D&B Build A List page will be included in the search results. The first ten matching individuals will display in the Leads dashlet, and you can click "Show More D&B Search Results" at the bottom of the dashlet to display the other individuals.



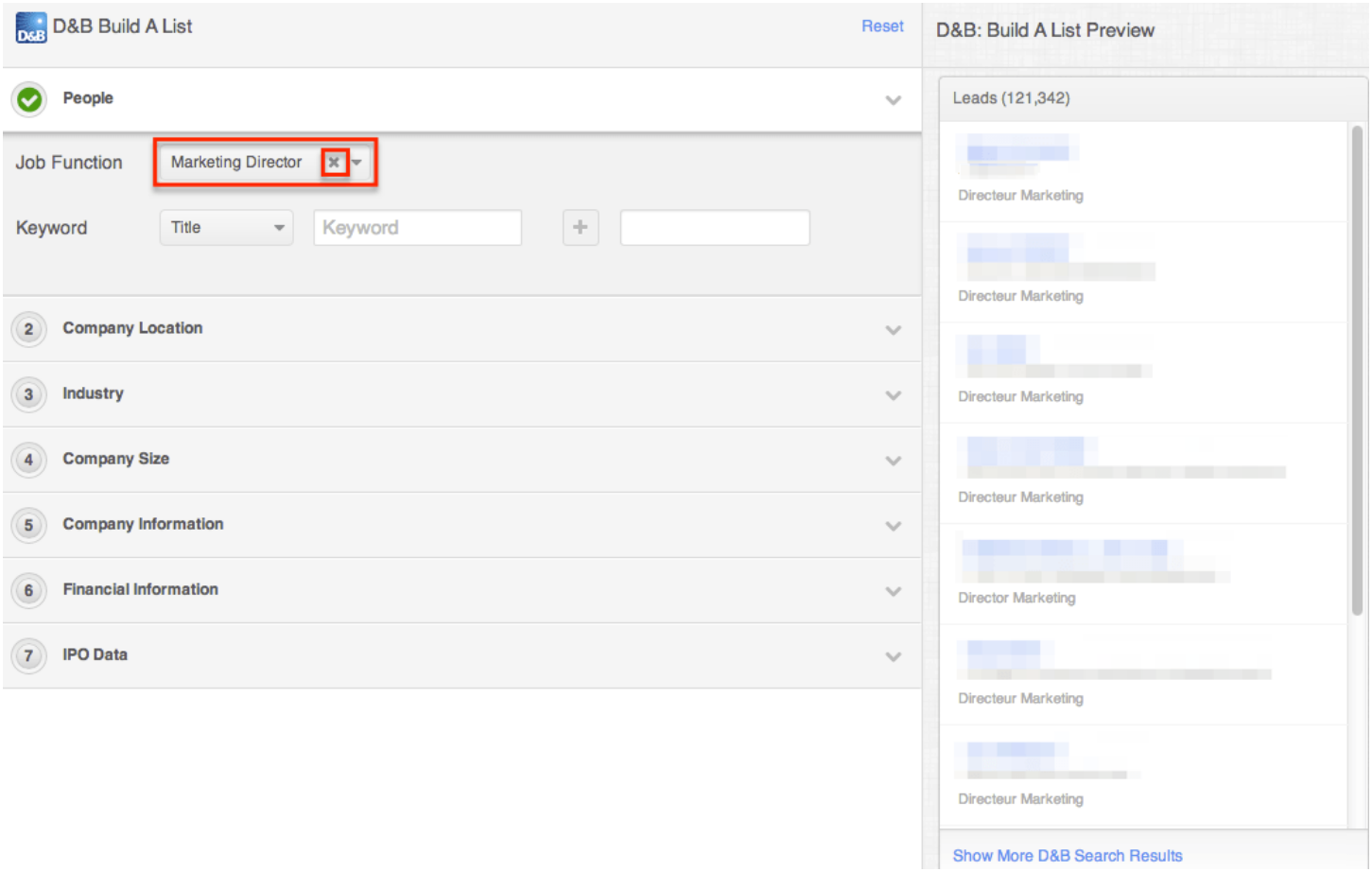

To import an individual, simply select the appropriate individual's name in the Leads dashlet and their key information (e.g. name, title, etc.) will display in the D&B: Lead Information dashlet. To return back to the previous search results, simply click "Back To D&B Contacts List" at the bottom of the D&B: Lead Information dashlet. To import the individual's data into Sugar, click the Import button on the upper right of the dashlet. The individual's data will appear in the corresponding Sugar fields in the lead's record view. In addition, the D&B Principal ID number associated to the individual in D&B will be populated automatically in the D&B Principal ID field of the lead's record view. The D&B Principal ID is used to identify the individual and detect duplicate records, so any record(s) in the dashlet detected as a duplicate of an existing record in Sugar will display "Duplicate" to the right of the individual's name. Sugar will also display any duplicate record(s) detected based on the D&B Principal ID when attempting to save the record.




Please note that if the selected individual is detected as a duplicate of an existing Sugar record, the duplicate record(s) will appear within the record view upon save, but you can click "Ignore Duplicate and Save" if you wish to proceed with creating the record. You can also choose to view and edit the duplicate record's details by clicking "Select and edit" in the panel. Please note that each individual will need to be imported one-at-a-time. Once the individual is imported to Sugar, you will be taken back to the Build A List page where your search filter criteria are still preserved and you can select other individuals to import from the results list.

## People Filter Panel

By default, the People panel is open at the top of the page and you can select a specific job function as well as enter a keyword based on the individual's title, biography, or both to pull up a matching list based on these criteria. As you select a job function or enter a keyword, the list of individuals meeting the criteria will start displaying in the Leads dashlet. You can remove any unnecessary filter values by clicking the "x" to the right of the value(s). The D&B: Build A List Preview dashboard will display the search results in real time as you enter your search criteria.



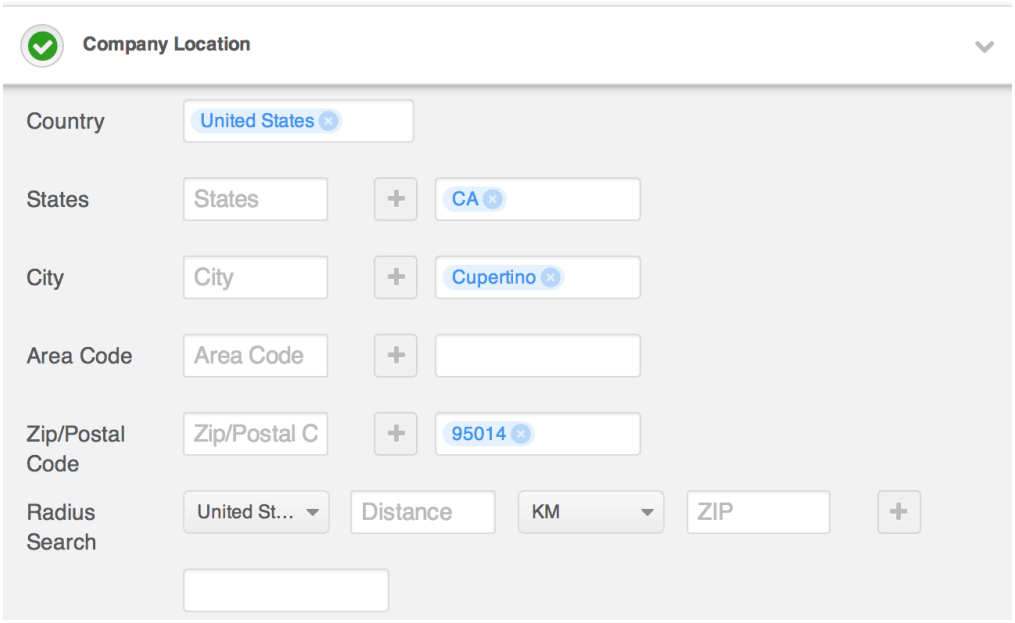

## Company Location Filter Panel

The Company Location panel allows you to enter search filters specific to a company's location (e.g. country, state, city, area code, etc.) in order to pull up individuals related to the company meeting the criteria. When creating the filter, you can either select a value from the dropdown list (e.g. Country) or enter a value in the open text box (e.g. City) to add the filter to your search. For example, you can select a country from the dropdown list by clicking in the open text box or begin typing a keyword then select the matching value in the list. You can add more than one value to this field by clicking in the box again to pull up the dropdown list or entering a value then selecting from the list.

When entering a value for the City field, you must click the Plus icon to the right of the open text box in order to have the filter applied to your search. You also have the option to add multiple values to the same filter criteria by entering the new value and clicking the Plus icon to add it to the list. You can also define a Radius Search criteria for either United States or Canada based on a specific distance from a certain zip code.

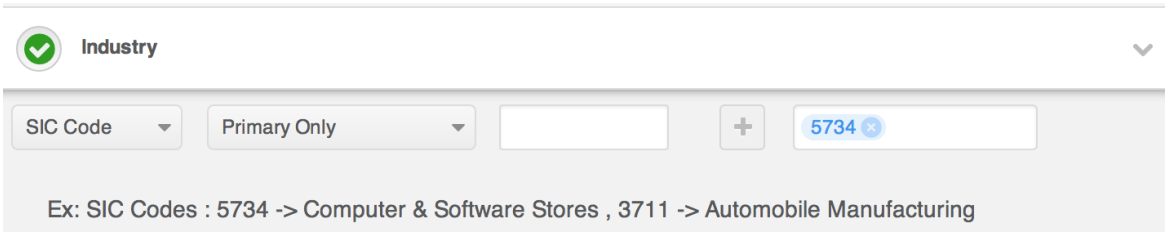
If you have the specific list of individuals you wish to import into Sugar based on

the related company's location, you can simply select the appropriate individual (e.g. John Smith) in the search results list and their key information (e.g. name, job title, email, etc.) will display in the D&B: Lead Information dashlet. Please note that each individual will need to be imported one-at-a-time. If you wish to apply additional filter criteria, please proceed to the other panels on the page.




## Industry Filter Panel

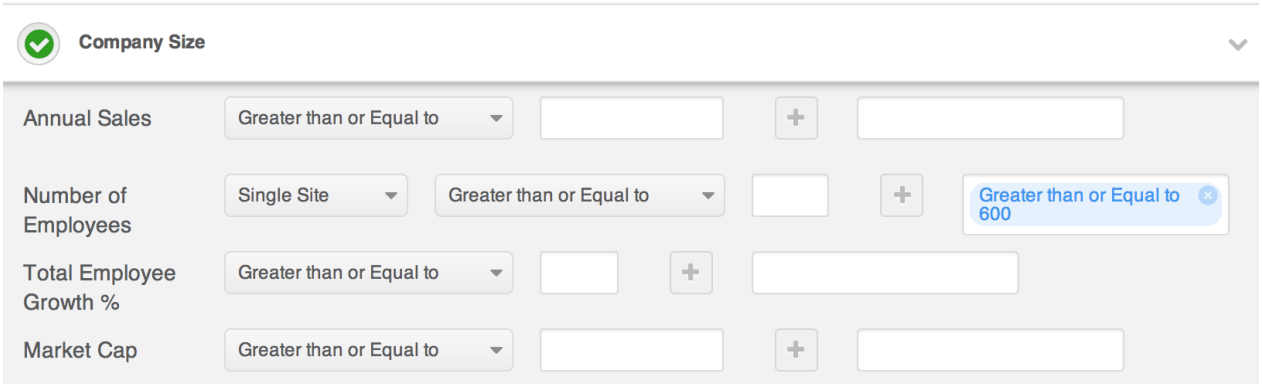
The Industry panel allows you to create a filter based on the NAICS Code or SIC Code of the company. You can select either "Primary Only" or "Primary and Secondary" as the corresponding condition from the dropdown list to the right. In the open text box, enter the appropriate SIC or NAICS code. Once you enter the appropriate code (e.g. 5734), click the Plus icon to apply this specific code to your D&B search. The D&B: Build A List Preview dashboard will re-build the results list to display the individuals related to the companies meeting all of the filter criteria entered on the page.




## Company Size Filter Panel

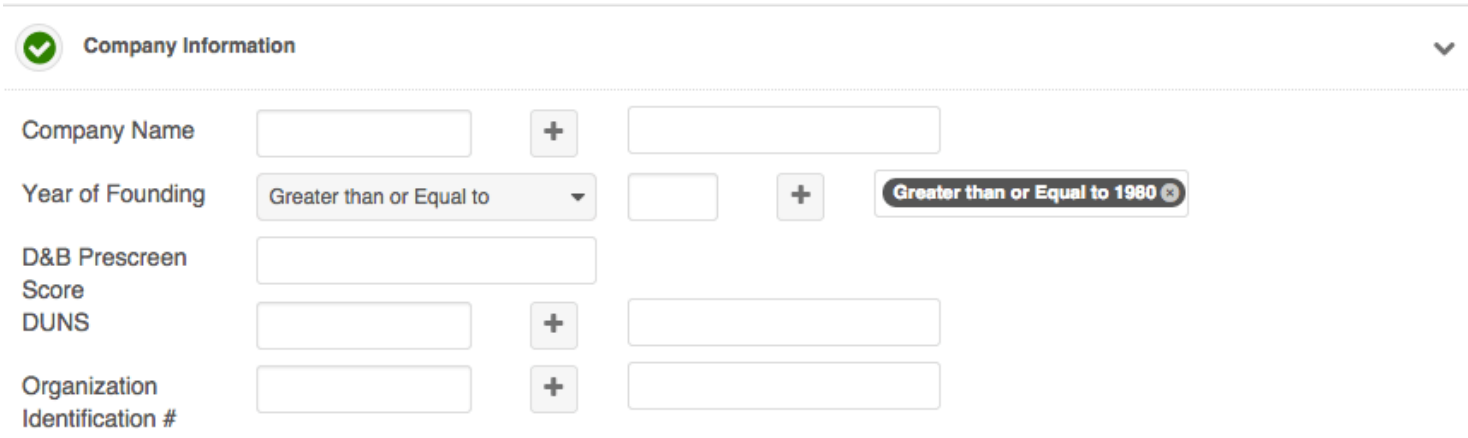
The Company Size panel provides filter options for annual sales, number of

employees, total employee growth percentage, and market cap. You have the ability to enter a range for values by selecting the Between option from the condition's dropdown list. The other conditions available to select are "Greater than or Equal to" and "Lesser than or Equal to". Click the Plus icon to add the values to the filter list to be applied to your Build A List search.



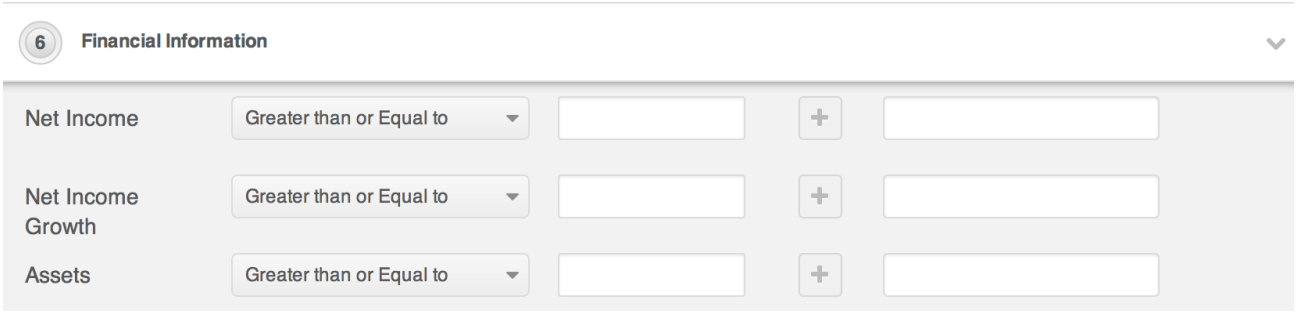

## Company Information Filter Panel

The Company Information panel enables you to filter based on the company's name, year of founding, D&B prescreen score, DUNS number, and organization identification number. To filter your search based on company name, simply enter the keyword then click the Plus icon to add the filter criteria. You can choose to enter a range for the year of founding by selecting the Between condition. You can also filter based on the organization's associated credit risk level by selecting "Low", "Medium", or "High" in the D&B Prescreen Score field. The specific 9-digit DUNS number for the company(s) can be entered in the DUNS field if you have that information. For more information regarding the DUNS number, please refer to the D&B Dashlets section of the Intelligence Pane documentation. If you have a specific organization identification number you wish to filter the search by, you can enter that value as well. The individuals related to the companies meeting all of the filter criteria will display in the intelligence page.



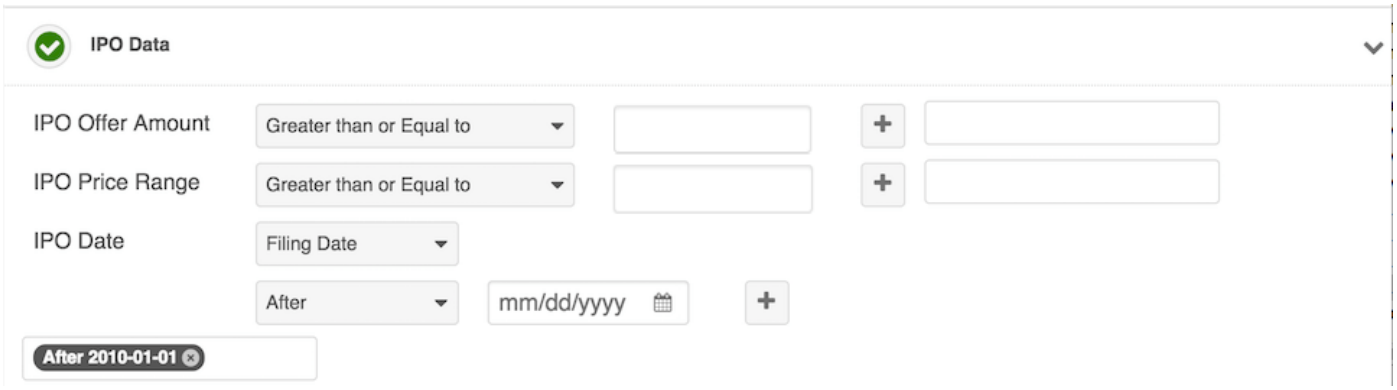
## Financial Information Filter Panel

The Financial Information panel allows you to narrow your search further by specifying the company's net income, net income growth, or asset values you wish to include in the filter. The conditions available to choose are "Greater than or Equal to", "Lesser than or Equal to", and "Between".




## IPO Data Filter Panel

The IPO Data panel includes the IPO Offer Amount and IPO Price Range filter options where you can enter the appropriate offering amount or price range of each share offered for the company. The conditions available to choose are "Greater than or Equal to", "Between", etc. In addition, you can filter based on the IPO date (Filing Date, Trading Date) by selecting the condition (e.g. After), choosing the date, then clicking the Plus icon.




Last Modified: 12/21/2015 06:09pm

# Contacts

## Overview

Sugar's Contacts module consists of individual people with whom your organization has a relationship. Contact records are typically related to an account record, and multiple contacts may be associated to a single account. There are various ways you can create contacts in Sugar such as via the Contacts module, importing contacts, converting leads to contacts, etc. Once the contact record is created, you can view and edit information pertaining to the contact via the Contacts record view. Each contact record may then relate to other Sugar records such as meetings, cases, opportunities, and many others, making the contact record a hub for viewing and continuing your interaction with the individual. This documentation will cover how to use the Contacts module as well as the various actions and options available from within the module.

## Contact Fields

The Contacts module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

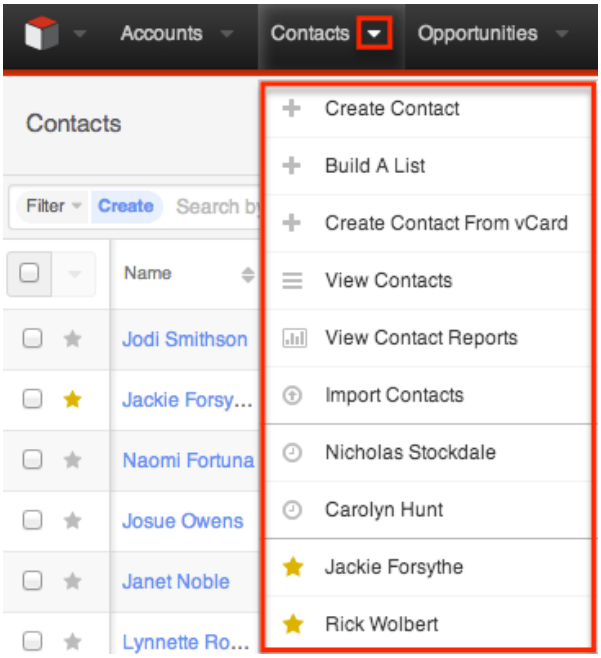
| Field | Description |
|---|---|
| Account Name | The account to which the contact belongs |
| Assigned To | The Sugar user assigned to the contact |
| Assistant | The name of the contact's assistant within his or her company |
| Assistant Phone | The assistant's phone number |
| Birthdate | The contact's date of birth |
| Campaign | The campaign, if any, from which the contact originated |
| Confirm Portal Password | When editing, confirmation of the contact's password for accessing Sugar Portal |
| Date Created | The date the contact record was created |
| Date Modified | The date the contact record was last modified |
| Department | The contact's department within his or her company |
| Description | A description or other information about |

| | |
|---|---|
| | the contact |
| Do Not Call | Indication that the contact should not be called |
| Email Address | The contact's email address |
| Fax | The contact's fax number |
| First Name | The contact's first name |
| Home | The contact's residence number |
| Last Name | The contact's last name |
| Lead Source | The source from which the contact originated |
| Mobile | The contact's mobile number |
| Name | When viewing, the contact's full name |
| Office Phone | The contact's office number |
| Other Address | The contact's alternate address (e.g. billing or shipping) |
| Other Phone | The contact's alternate phone number |
| Picture | An image for the contact (e.g. business card or profile picture) |
| Portal Active | Indication that the contact is enabled to access Sugar Portal |
| Portal Application | The portal application name. Only used when integrating a custom portal solution with Sugar. |
| Portal Name | The contact's user name for accessing Sugar Portal |
| Portal Password | The contact's password for accessing Sugar Portal |
| Preferred Language | The contact's preferred language when accessing Sugar Portal |
| Primary Address | The contact's primary address |
| Reports To | The contact's manager in his or her company |
| Salutation | Standard greeting for the contact (e.g. Mr., Ms., Mrs., etc.) |
| Sync to mail client | Indication that the contact should be synced to mail client when using the Sugar Plug-in for Outlook / Lotus Notes / etc. |

| | |
|---|---|
| | Note: This field must be set on a per-user basis. |
| Teams | The Sugar team(s) assigned to the contact record |
| Title | The contact's title within his or her company |

## Contacts Module Tab

The Contacts module tab is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access the Contacts list view. You may also click the triangle in the Contacts tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of contacts you last viewed in the module. The Favorites menu displays the list of contacts you most recently marked as favorites in the module.




The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|---|---|
| Create Contact | Opens the record view layout to create a new contact |
| Build A List | Opens the D&B Build A List Page to create a list of contacts for import based on various search filter criteria |

| | |
|---|---|
| | Note: D&B connector must be enabled via Admin > Connectors in order to utilize the Build A List page. |
| Create Contact From vCard | Imports a vCard file from your computer to create a new contact |
| View Contacts | Opens the list view layout to search and display contacts |
| View Contact Reports | Displays existing reports based on the Contacts module |
| Import Contacts | Opens the import wizard to create or update contacts using external data |

If you do not see the Contacts module tab in Sugar, please check the following:

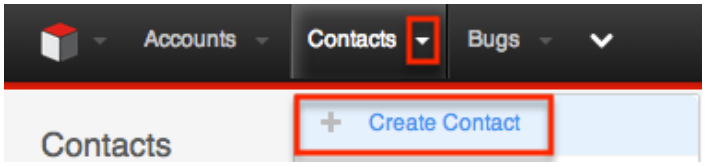
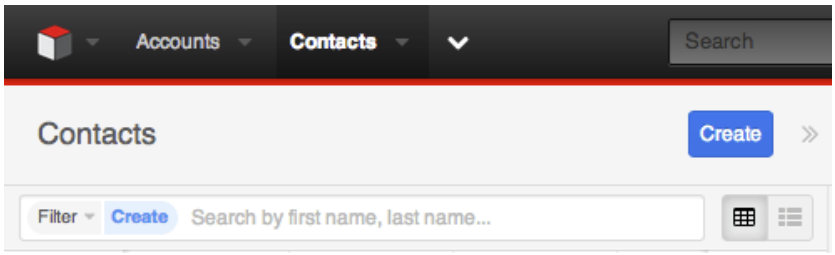
- The Contacts module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Contacts module in the Hide Modules list, simply move it to the Display Modules list and save. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Contacts module for your entire Sugar instance. Reach out to your Sugar administrator to have the Contacts module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

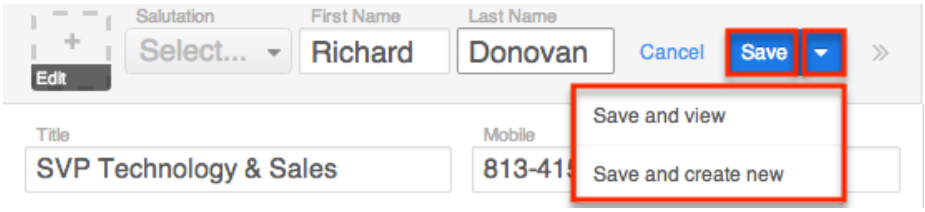
## Creating Contacts

There are various methods for creating contacts in Sugar including via the Contacts module, quick create, vCard, duplication, emails, importing contacts, and converting leads to contacts. The full record view layout opens when creating the contact directly from the Contacts menu and includes all of the relevant fields for your organization's contacts. The quick create form is a shortened version of the contacts record view and typically contains fewer fields. When using quick create to make a contact while viewing an existing record of another module, Sugar automatically creates a relationship between both records. For example, if you are viewing an account record (e.g. ABC Company) and create a new contact via the quick create form, the Account Name field in the contact record will automatically populate with "ABC Company", thus creating the relationship. Both the Record View and Quick Create layouts can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

## Creating Via Contacts Module

One of the most common methods of contact creation is via the Create Contact option in the Contacts module tab. This opens up the record view layout which allows you to enter in all the relevant information for the contact.
Use the following steps to create a contact via the Contacts module:

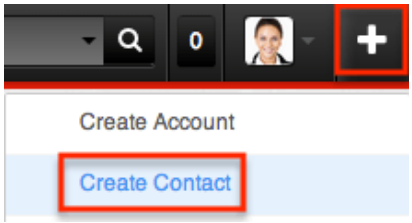
1. Click the triangle in the Contacts module tab to open the actions menu and select "Create Contact". You can also click the Create button on the upper right of the Contacts list view.
   From Contacts module tab:
   
   
   From Contacts list view:
   
   
2. Enter appropriate values for the fields in the record view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".
   - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.

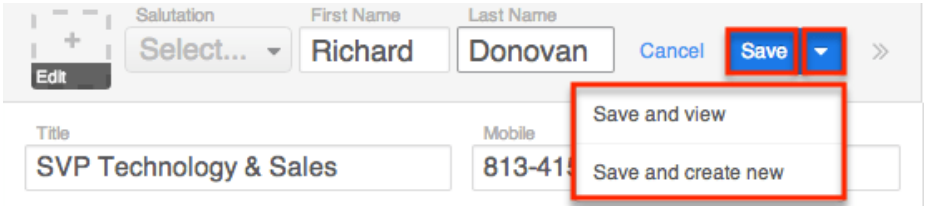



## Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also quick create a contact from any Contacts

subpanel on related module records.
Use the following steps to create a contact via Quick Create:

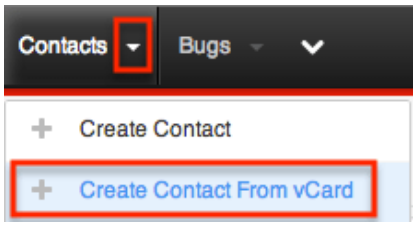
1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Contact" or select "Create" on any Contacts subpanel on a related module's record view.
   From Quick Create menu:
   
   
   From subpanel:
   
   
2. Enter appropriate values in the fields in the quick create form. All required fields are marked with a red asterisk and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".
   - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.




## Creating Via vCard

vCards are electronic business cards that are exchanged between applications such as email and web browsers. In addition to allowing contacts to be saved as vCards for use in other software, you can also generate a new Sugar contact from a vCard.
Use the following steps to create a contact in Sugar via vCard:

1. Click the triangle in the Contacts module and select "Create Contact From vCard".




2. Choose the vCard file from your computer and click "Create".

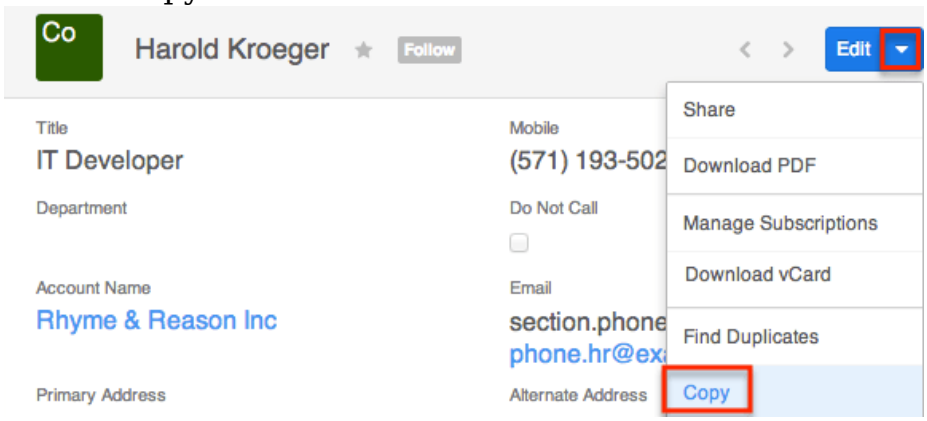



## Creating Via Duplication

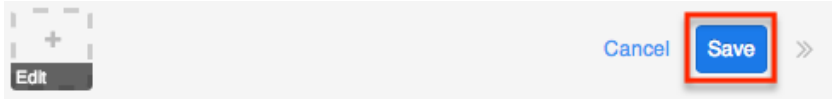
You can also create a new contact by duplicating an existing contact record. The copy option is useful if the contact you are creating has similar information to an existing contact.

Use the following steps to create a contact by duplicating an existing record:

1. Navigate to a contact's record view.
2. Select "Copy" from the Actions menu.

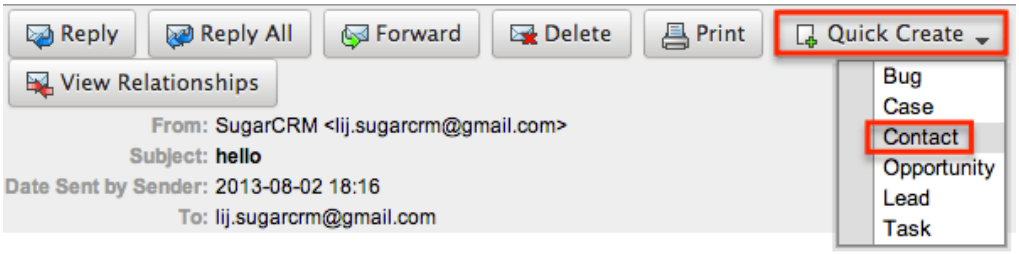



3. The displayed record view is pre-populated with the original contact's values. Update the necessary fields, then click "Save".
    - Please note that you can also click the Actions Menu to the right of the Save button to select the "Save and view" or "Save and create new" options. Save and view will display the record's details after the save is complete. The Save and create new option saves the current record and opens a new, blank record view in edit mode where the user can create another record.



## Creating Via Emails

The Emails module enables users to create new contact records from external and imported emails using the Quick Create option. Simply click the Quick Create button above the selected email header then select "Contact".




A pop-up window will open with the quick create form where you can enter relevant values for the new contact. The name, email address, and description fields are populated by default based on the emails subject, body, etc. All required fields are marked with a red asterisk and must be completed prior to saving. Once the necessary information is entered, click "Save". For more information on how to create, send, and manage emails, please refer to the Emails documentation.

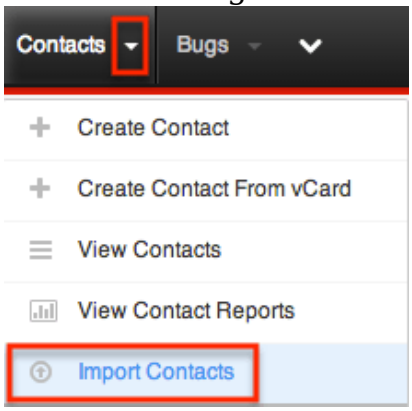
Please note that the selected email will be imported, if not already, and automatically related to the new contact. The email record will appear within the History subpanel of the Contact's record view.

## Importing Contacts

The import function allows you to push multiple contact records into Sugar using a comma (or other character) delimited file instead of creating them one-by-one. For more information on importing, please refer to the Import documentation.

Use the following steps to import contacts via the Import Contacts option:

1. Click the triangle in the Contacts module tab and select "Import Contacts".



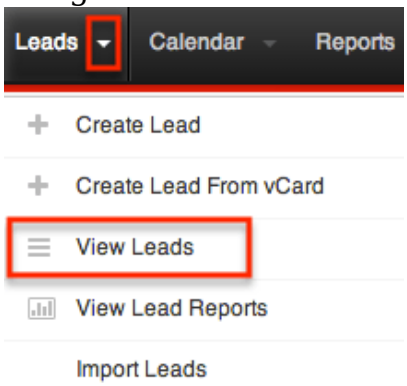
2. In Step 1, select the source of the data you are importing. Click "Next".
3. In Step 2, select the import file and choose "Create new records only". Click "Next".
4. In Step 3, confirm the import file properties. Click "Next".
5. In Step 4, confirm the field mappings for the import. Click "Next".
6. In Step 6, view the import results.
    - The Created Records tab will show all of the new contact records.
    - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
    - The Errors tab will show records that were not imported due to errors detected during import.

## Converting Leads to Contacts

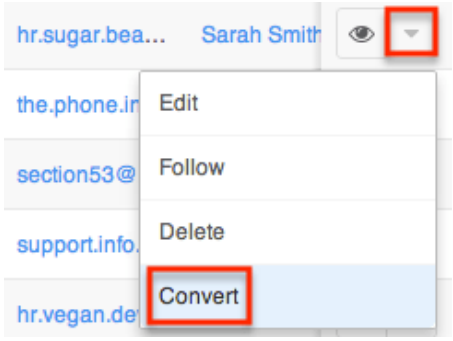
Sugar enables you to convert lead records to contact records as you determine that they qualify for your organization's definition of a contact (e.g. after an evaluation/qualification process or upon entering into business with the individual). When the lead is converted, a new contact record is created with a relationship to the original lead record. For more information on converting leads, please refer to the Leads documentation.

Use the following steps to convert leads into contacts:

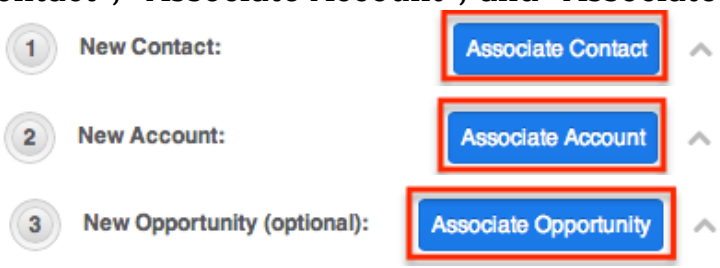
1. Navigate to a lead's record view.



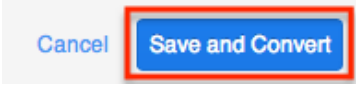

2. Select "Convert Lead" from the Actions menu.



3. Complete the appropriate sections of the Convert Lead page.
4. Associate any relevant information with the contact by clicking the "Associate Contact", "Associate Account", and "Associate Opportunity" buttons.




5. Click "Save and Convert" to convert the lead and save the contact information.




## Viewing Contacts

There are various options available for viewing contact records in Sugar including via Contacts list view, Contacts record view, Contacts Recently Viewed menu, dashlets, and reports. Please note that you will only be able to see contact records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

### Viewing Via List View

The Contacts list view displays all contact records meeting the current search criteria. Users can also access the activity stream to view posts specific to the contact record. For more information the Record View's Activity Stream, please refer to the Activity Stream section of this documentation. The Intelligence pane can also be viewed to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's sales, cases, activities, etc. For more information regarding the Record View's Intelligence Pane, please refer to the Intelligence Pane section of this documentation. To access the list view, simply click the Contacts module tab. While list view shows key contact fields, you can click the contact's name to open the record in record view. For more information on viewing contacts via list view, please refer to the Contacts List View section.

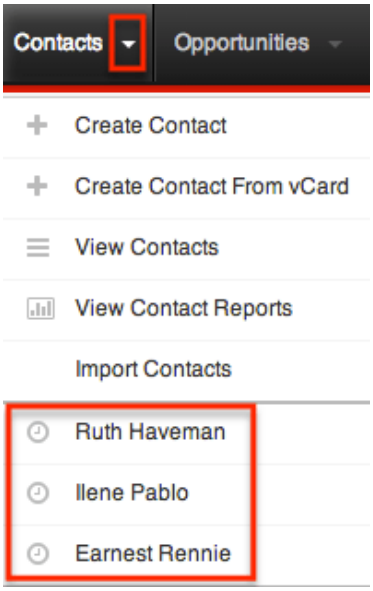
### Viewing Via Record View

The Contacts record view displays thorough contact information including all

relevant contact fields followed by subpanels of the contact's related records belonging to various modules. Users can also access the activity stream to view posts specific to the contact record. For more information the Record View's Activity Stream, please refer to the Activity Stream section of this documentation. The Intelligence pane can also be viewed to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's sales, cases, activities, etc. For more information regarding the Record View's Intelligence Pane, please refer to the Intelligence Pane section of this documentation. The record view can be reached by clicking an contact record's link from anywhere in the application including from the Contacts list view. For more information on viewing contacts via the record view, please refer to the Contacts Record View section of this documentation.

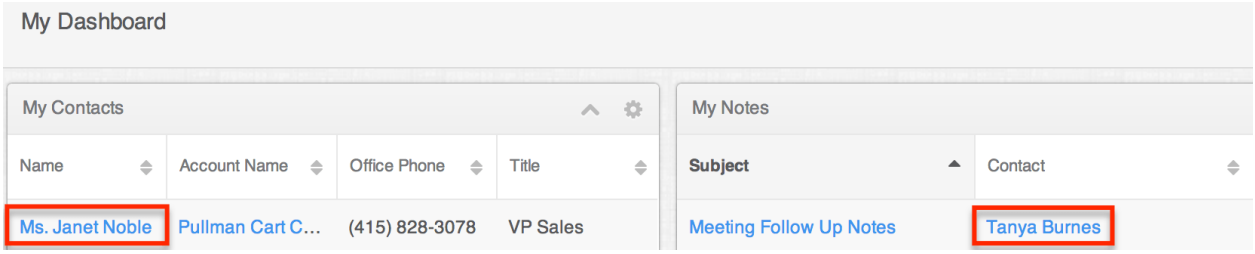
## Viewing Via Recently Viewed

As you work, Sugar will keep track of which contacts you have recently viewed. Click the triangle in the Contacts module tab to see a list of your most recently viewed contacts and click each name to open the contact in record view.



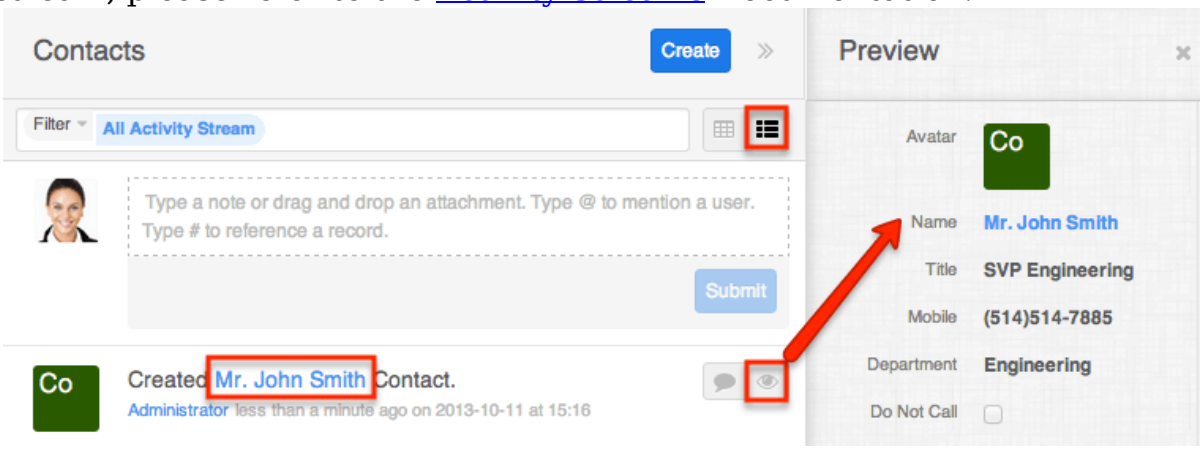

## Viewing Via Dashlets

Sugar Dashlets allow users to get a quick view of various records, activities, reports, etc. Dashlets may be added to a user's Home page or to the intelligence pane of any module. You can view contact information in List View dashlets specific to the Contacts module (e.g. My Contacts dashlet), as well as List View dashlets based on other modules such as "My Notes". Clicking a contact's name from any dashlet will open the Contacts record view. For more information on using dashlets and viewing contact records via dashlets, please refer to the Intelligence Pane documentation.



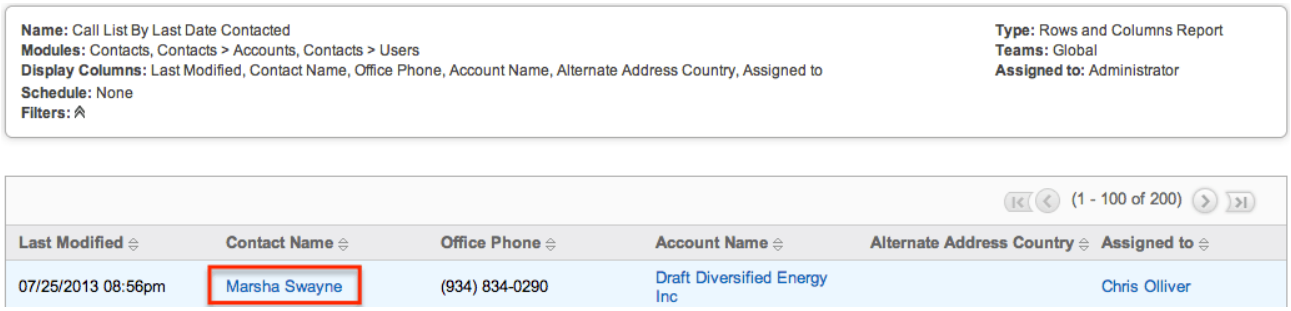

## Viewing Via Activity Streams

The activity stream allows users to view each other's activities in Sugar and the actions that took place for the various modules (e.g. Contacts, etc.) via posts (record post, user post, etc). You can access the Contacts record view by clicking the contact's name referenced in the post. You can also preview the contact record's detail directly from the activity stream by clicking the Preview button to the right of the post. For more information on viewing records via the activity stream, please refer to the Activity Streams Documentation.

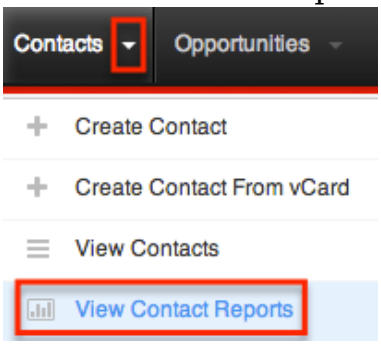



## Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding contacts and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the contact's record view by clicking the contact's name in the report results. Please note that you can only directly access contact record views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation.




In addition to navigating to the Reports module and finding or building relevant reports, you can use the Contact module tab's View Contact Reports option to see all contact-based reports to which you have access.




Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

## Searching Contacts

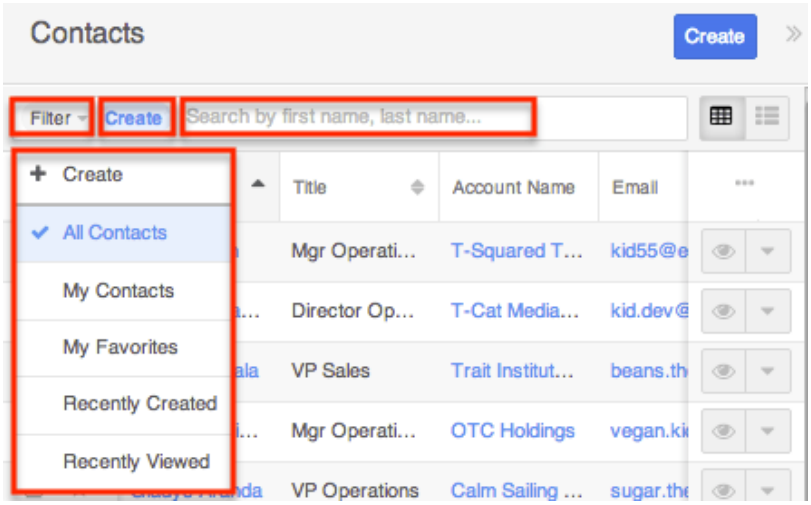
The Contacts list view includes a module search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Contacts list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %smith). This will pull up any record that has the word "smith" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

## Module Search

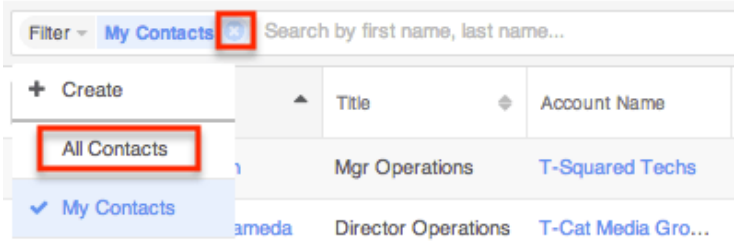
Module search enables users to easily search by Contact name within the Contacts module and pull up matching records in the list view. Records are deemed as matching when their first or last names start with any of the terms entered in the open Search box. The search also provides a Filter option which can be used in combination with the open Search box to narrow your search further using the available options as follows:

- Create : Create a new custom filter which you can use to filter your search
  - Note: You can also click "Create" to the right of the Filter option.
- All Contacts : Returns all records in the module to which you have access
- My Contacts : Returns only records assigned to you
- My Favorites : Returns only records you have marked as favorites
- Recently Created : Returns only records you created in the module within the last 7 days
- Recently Viewed : Returns only records you have viewed in the module within the last 7 days




When you choose a filter, Sugar will return contacts which match both the selected filter and any name provided in the "Search by first name, last name..." bar in the filtered list view results. For example, if you select "My Contacts" in the Filter options and enter a contact name, Sugar will only return contact records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search bar. To see all contact records to which you have access, simply select the All Contacts option in the filter and remove any text from the search bar. You can also click the Clear icon within the selected filter option (e.g. My Contacts) in the Search bar to clear the filter and pull up all list view search results. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter.

Please note that searches using the open Search box only are not preserved when navigating away.




Please note that you will only be able to see contact records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Administrators can configure what fields appear on the Contacts Module Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

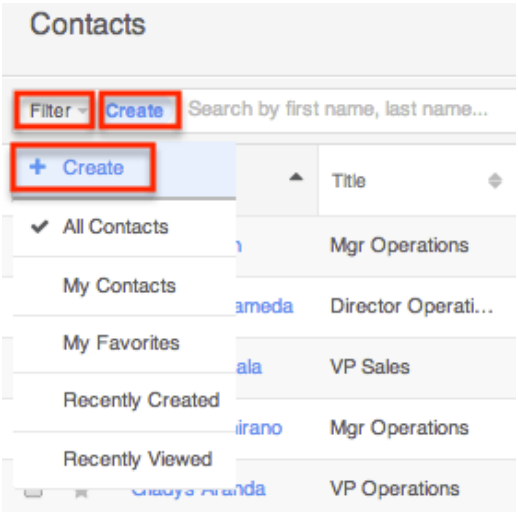
## Creating a Filter

Users can also create new filters via the Create option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the Contacts list view. You have the option to add multiple fields to your new filter by clicking the Plus button to the right of the filter selection dropdown lists and set select operators along with their value(s). A filter's criteria need to be true for a record in order for it to appear in the list view search result. Additionally, filters with no specified values may be saved as a custom filter to act as a filter template when a user often searches using the same fields but with varying values. Please note that only fields you have view access for will appear in the Filter list when creating a search filter.

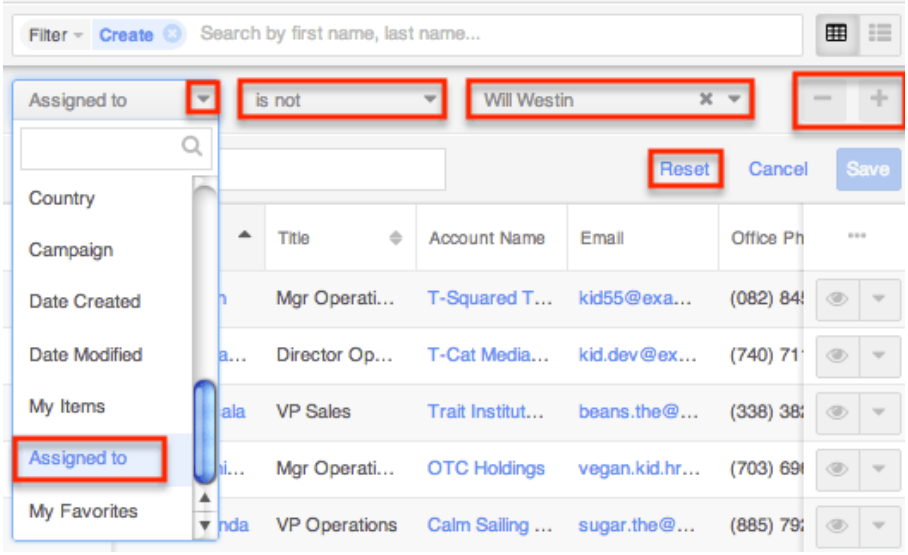
When you run a search using a created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.

The following steps cover creating a new Assigned to filter as an example:

1. Click the Filter option on the Contacts search bar then select "Create".
    - You can also click "Create" to the right of the Filter option.




2. Select the field you wish to add to your filter as well as the condition and matching criteria.
    - Note: Only fields you have view access for will be available to add in the Filter list.
3. To add additional fields to the new filter, click the Plus button to the right of the filter.
    - To remove fields from the new filter, click the Minus button to the right of the filter.
    - To clear any filter values (e.g. Will Westin), simply click the "x" to the right of the value or select "Reset" to the left of the Save button.



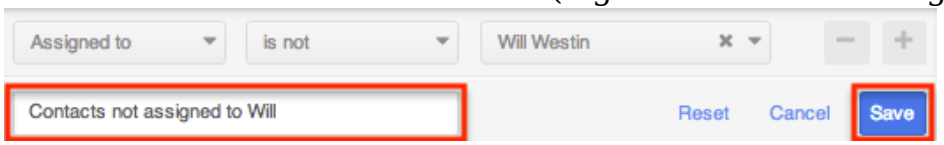

The list view will automatically display results matching your filters as you create and modify the criteria.

## Saving a Filter

Saving a filter will preserve the chosen fields as well as the condition(s) of the matching value(s). Additionally, it will allow users to easily select previously

created and saved filters from the Filter options.

The following steps cover saving a new search by Name filter as an example:

1. Create a new filter to perform a search on your desired fields.
2. Enter in a name for the new filter (e.g. "Contacts not assigned to Will").


3. Click "Save" to add this filter to the module's Filter options.

## Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search may be used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.




To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.
Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the Search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

# Contacts List View

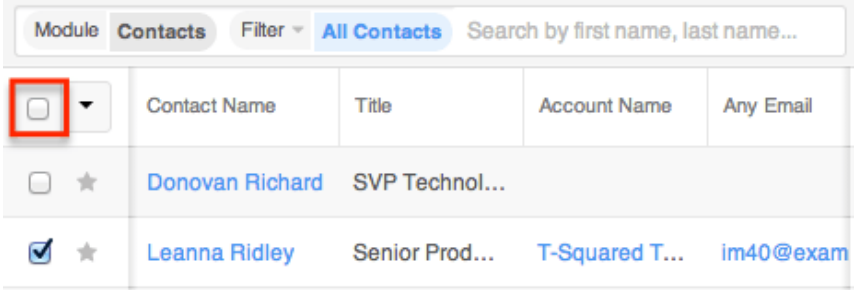
The Contacts list view displays all contact records meeting the current search criteria and to which your user has access. You can view the basic details of each contact within the field columns. Please note that you will only be able to see contact records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

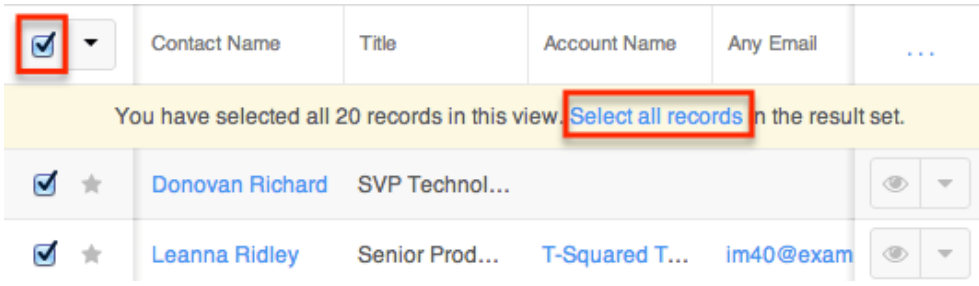
## Checkbox Selection

You can perform several actions on contact records directly from the list view by first selecting the desired records. To select individual contact records on the Contacts list view, mark the checkbox on the left of each row. To select or deselect multiple contact records on the list view, use the options in the checkbox dropdown menu:

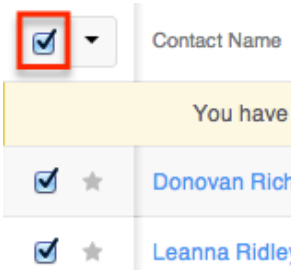
- Select This Page : Selects all records shown on the current page of contact results.




- Select all records : Selects all records in the current search results across all pages of contact results.

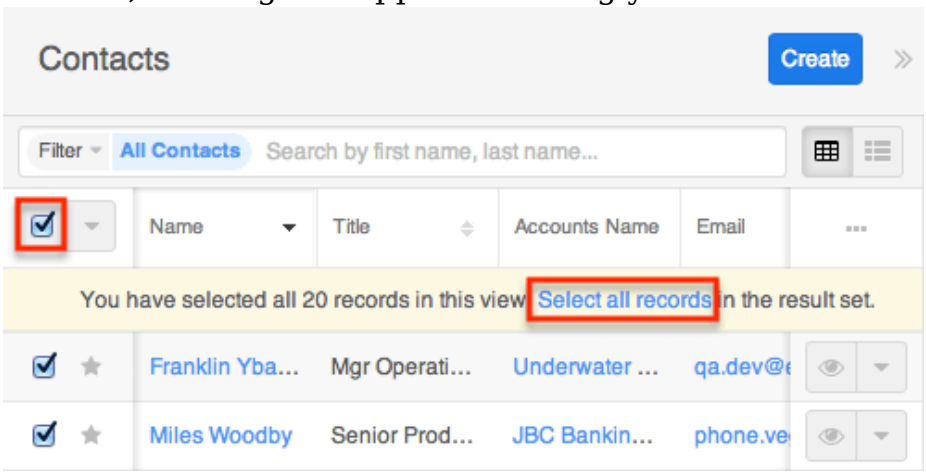



- Clear selections : Deselects all records that are currently selected.

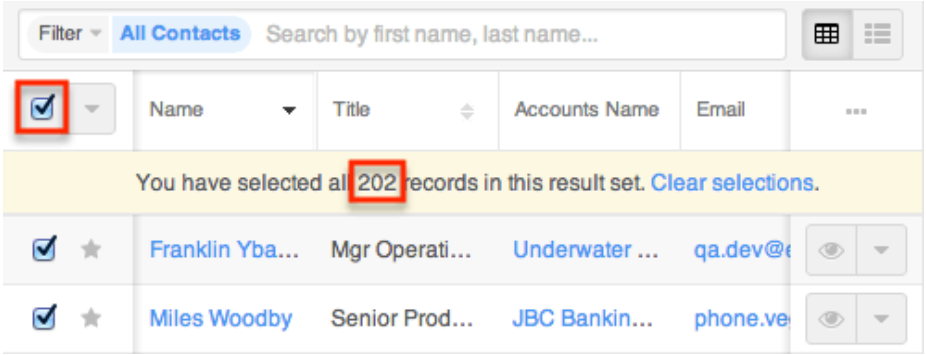


## Total Record Count

You can view the total record count on the Contacts list view by selecting all records displayed on the current set of list view results. Once the records are selected, a dialog will appear allowing you to select all records in the results set.

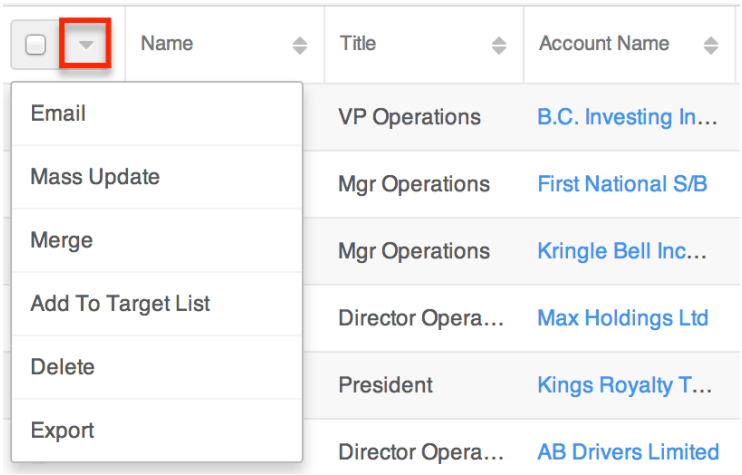



The total count of all records on the list view result set will appear in the dialog.




## Mass Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.

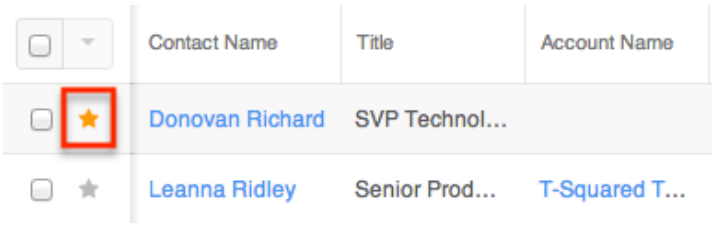



The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Email | Email one or more contacts at a time |
| Mass Update | Mass update one or more contacts at a time |
| Merge | Merge two or more duplicate contacts |
| Add to Target List | Add one or more contacts to a target list |
| Delete | Delete one or more contacts at a time |
| Export | Export one or more contacts to a CSV file |
| Recalculate Values | (Available in certain circumstances) Updates calculated values to reflect changes to calculated fields made in Studio |

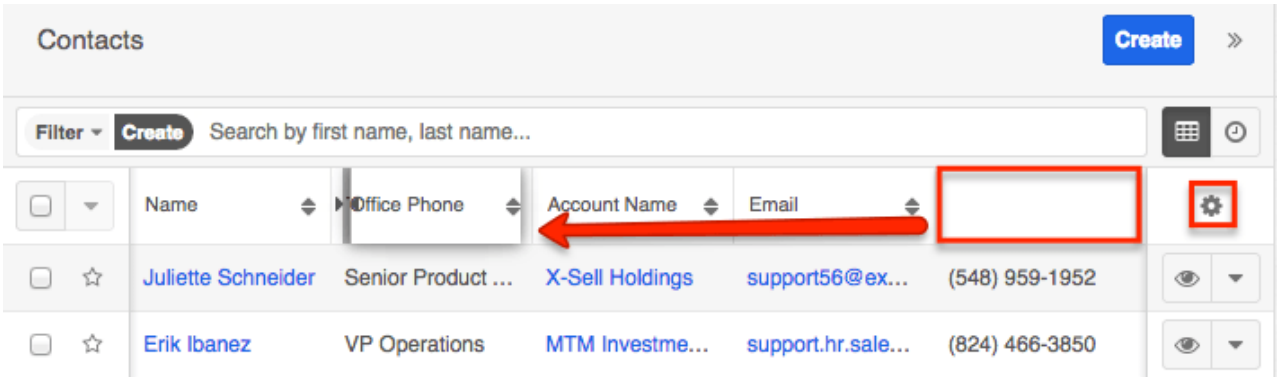
## Favoriting Designation

Users have the option to mark contact records as favorites via the list view as well as the record view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Contacts module tab. In the Contacts list view, the star on the left of each contact's row is yellow once marked to indicate a favorite contact. For more information on marking records as favorites, please refer to the Favoriting Contacts section of this documentation.



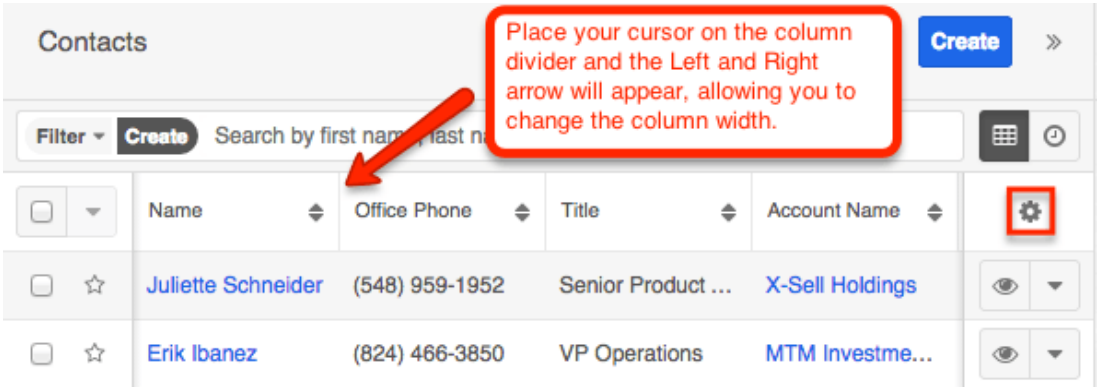

## Column Reordering

List view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the default column order.




## Column Resizing

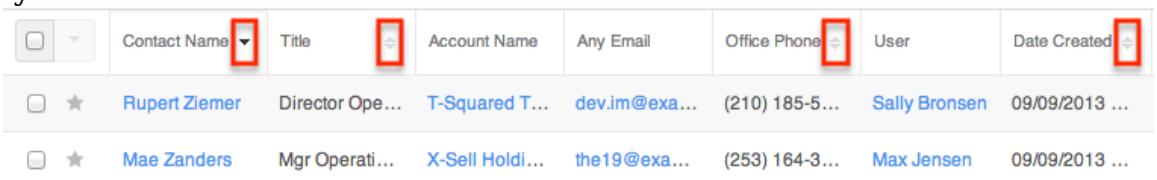
Users can easily adjust the size of columns in the Contacts list view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the current list view is different from the default column width. Changes to the column width made by administrators in Studio are only respected if the user has not resized the specific column in the list view. The column size set by the user will supersede the default column width configured in Studio until the user resets the list view back to the default widths.




## Column Sorting

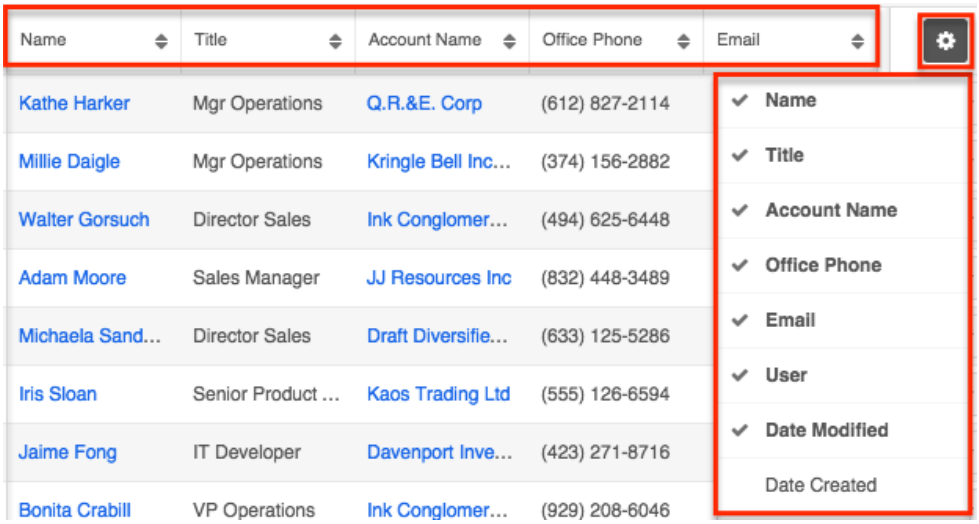
List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows.

Note: List views may only be sorted by one column at a time and cannot be sorted by custom relate fields.



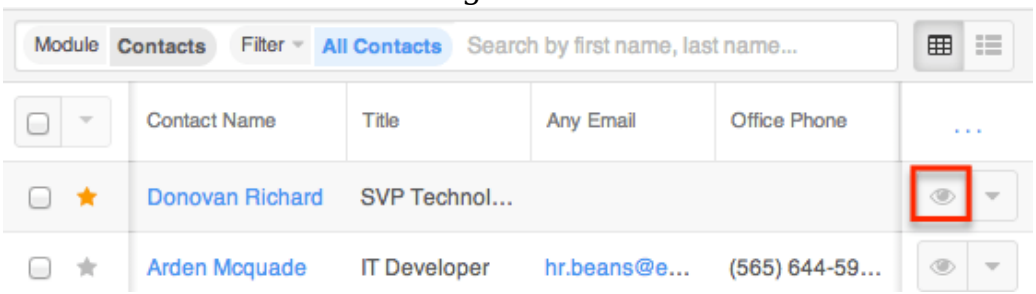

## Column Selection

Sugar gives users the ability to personalize the list view by specifying which fields they want to be displayed in the list view. You can click the Column Selection icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column on your list view. Please note that administrators have the ability to configure what fields are available to display in the list view via Admin > Studio. For more information on configuring fields to display in the list view, please refer to the Studio documentation in the Administration guide.

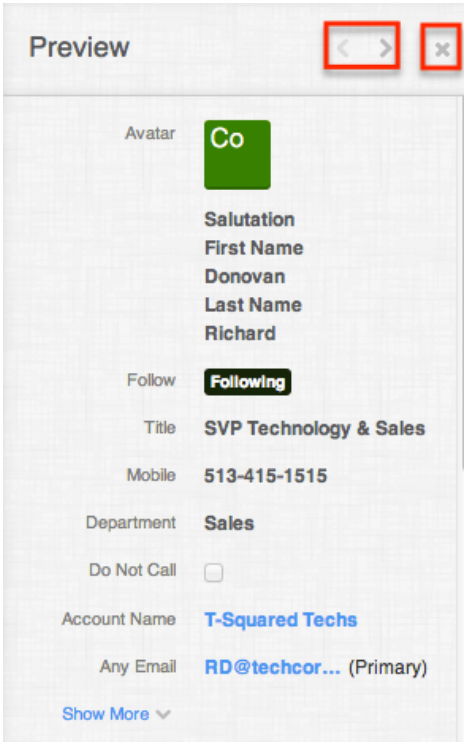



## Preview

Users can view a record's details directly from the Contacts list view by clicking the Preview icon to the far right of each contact's row.

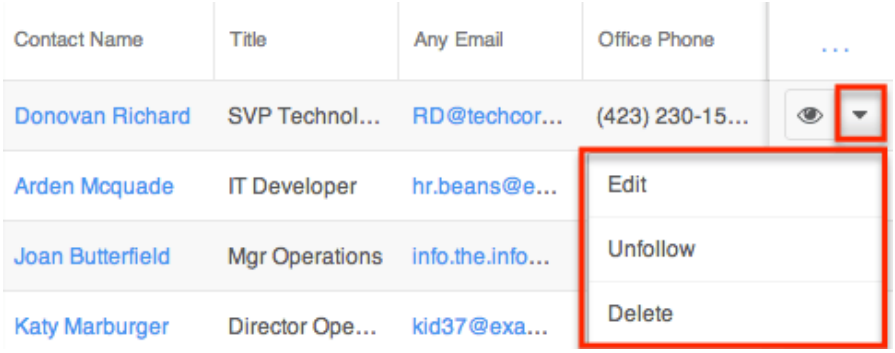



The record's data will display to the right of the list view providing key information regarding the record as well as the related activity stream information. On the upper right of the preview pane, there is a Left and Right arrow button that allows you to scroll through the list view's current search results by previewing the next or previous record. To close the preview, simply click the "X" on the upper right of the preview pane.




## Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to edit, follow, or delete specific records directly from the list view.

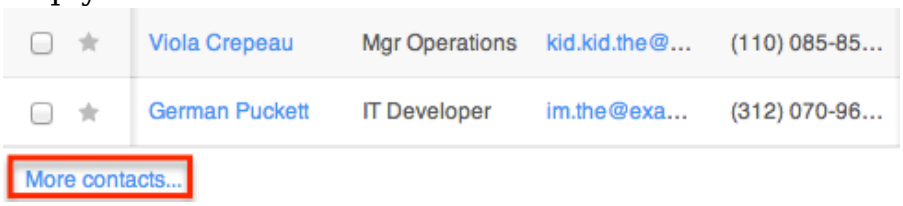



The options in the Record Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this contact |
| Follow | Follow / Unfollow this contact |
| Delete | Delete this contact |

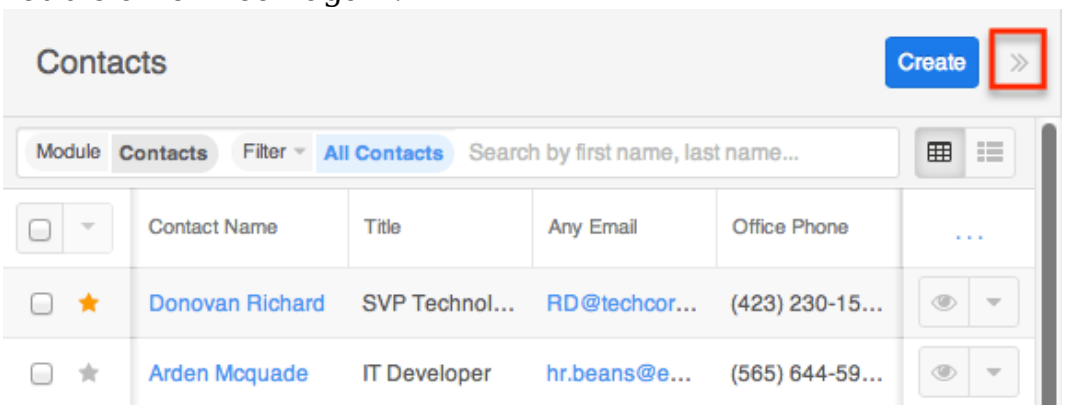
## More Contacts

The list view loads an initial number of records meeting the current search criteria with the option to show additional results at the user's request. By default, Sugar displays 20 records per list view results set, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the Studio documentation in the Administration guide. To load the next set of list view results, simply click the More Contacts link at the bottom of the list view.




## Right-Hand Side Drawer

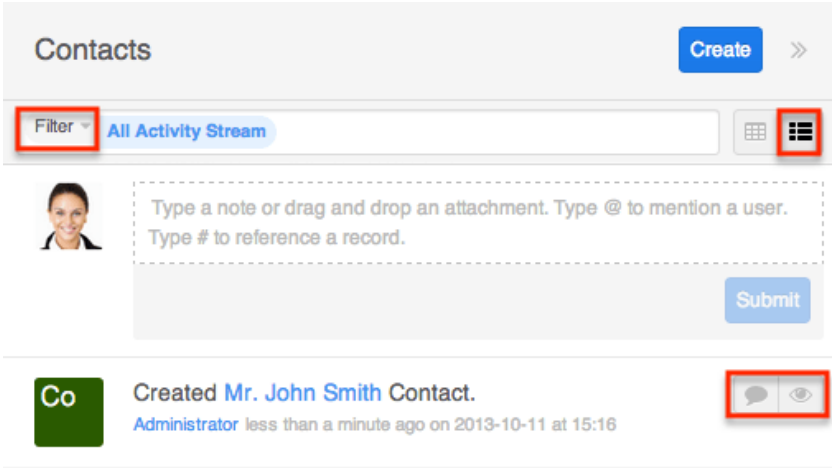
On the upper right of the Contacts list view there is a Double arrow icon which allows users to expand the list view to the full screen width. The intelligence pane to the right of the list view will be hidden when the list view is expanded. To reduce the list view's width and reveal the intelligence pane, simply click the Double arrow icon again.




## Activity Stream

The Contacts module's activity stream displays user posts made on the Contacts module and record posts relevant to a contact record. To view the module's activity stream, simply click the Activity Stream button to the right of the list view's search bar. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts using the comment button to the far right of each post. You can also preview the record referenced in record posts by clicking the Preview button to the right of each post. The activity stream can be filtered to only display certain messages (e.g. Messages

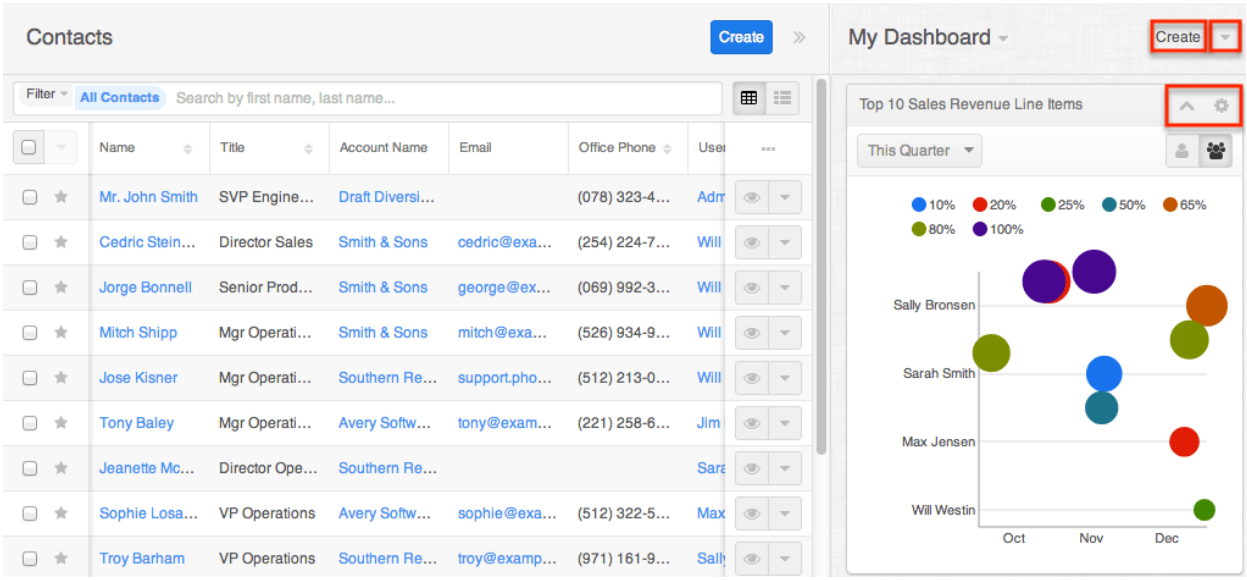
for Create, Messages for Update, etc.) by clicking "Filter" above the post input box and selecting the desired message type.




## Intelligence Pane

An intelligence pane displays to the right of the Contacts list view and provides users with valuable record information via various dashlets. The Help dashboard normally displays by default along with the List View Help dashlet and Learning Resources dashlet. The List View Help dashlet provides users with a brief introduction to the module along with a link (e.g. Contacts documentation) to the corresponding documentation in the Application guide. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may create other dashboards for use with the Contacts module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets (e.g. My Contacts, etc.) to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do no wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Contacts module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.



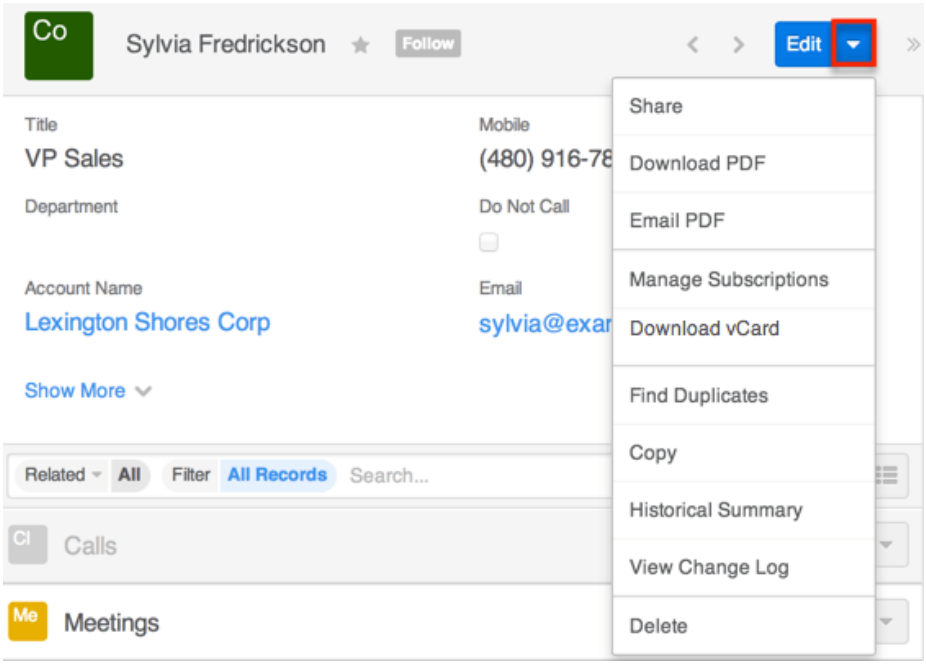

# Contacts Record View

The Contacts Record view displays thorough contact information including all contact fields which are grouped by default into the Overview, More Information, and Other panels. You can also view a contact's related records (Activities, Opportunities, Leads, etc.) which appear in subpanels beneath the contact fields. The record view can be reached by clicking a contact record's link from anywhere in the application including from the Contacts list view.

Please note that you will only be able to view a contact record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Users with administrator or developer access have the ability to change the record view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Actions Menu

The Actions menu on the top left of each contact's record view allows you to perform various actions on the current record.




The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this contact |
| Share | Share a link to this contact via email |
| Download PDF | Download contact information as a PDF file |
| Email PDF | Email contact information as a PDF attachment |
| Manage Subscriptions | Manage this contact's newsletter campaign subscriptions |
| Download vCard | Download a vCard from Sugar and transfer this contact's information to another application (e.g. Outlook) |
| Find Duplicates | Locate potential duplicates of this contact |
| Copy | Duplicate this contact |
| Historical Summary | View a historical summary of activities (e.g. calls, meetings, etc.) related to this contact |
| View Change Log | View a record of changes to this contact |
| Delete | Delete this contact |

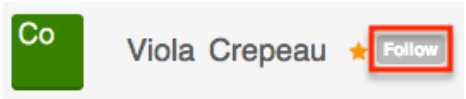
## Favorite Designation

Users have the option to mark contact records as a favorite via the record view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Contacts module tab. In the Contact's record view, the star on the right of the contact's name is yellow once marked to indicate a favorite contact. For more information on how to mark records as favorites, please refer to the Favoriting Contacts section of this documentation.



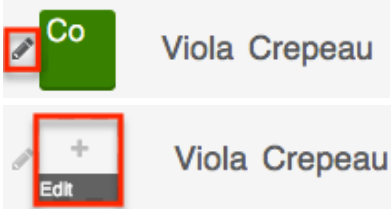

## Following Designation

Users also have the option to follow contact records via the record view or list view. This allows users to view record posts from followed contacts on their Home page and Contacts list view activity streams. Each user can personalize their activity stream by viewing posts for records that are most important to them. From the record view, users may follow or unfollow contacts to which they have access using the Follow button to the right of the contact's name. For more information on how to mark records to follow via the list view, please refer to the Record Actions Menu section of this documentation. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. If you wish to stop following a specific contact record, click the Following button to revert it to gray. Should a user lose access to a record in Sugar, they will automatically stop following that record.



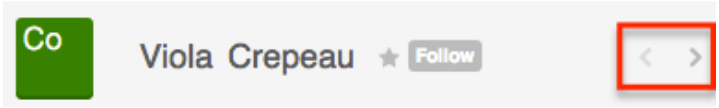

## Contact Image

Users can select an image for their contact. This allows users to associate a relevant picture with their contact. To edit a contact's picture from record view, click the pencil in front of the contact picture, then press on the "+" to select a new picture. Click the "Open" button to update the picture.



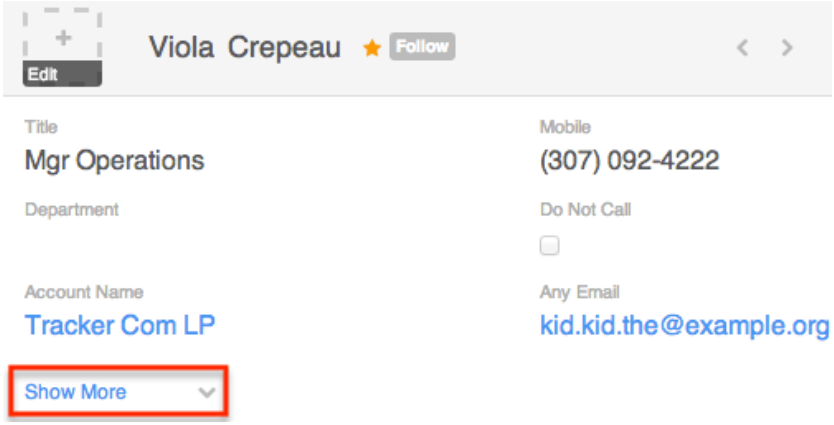
## Next or Previous Record

On the upper right of the Contact's record view, there are two buttons that allow you to page through each contact in the Contacts list view's current search results. Clicking the Previous button displays the previous contact of the current search results while clicking the Next button displays the next contact of the current search results. The text in between shows which contact result you are currently viewing within the total number of current results.



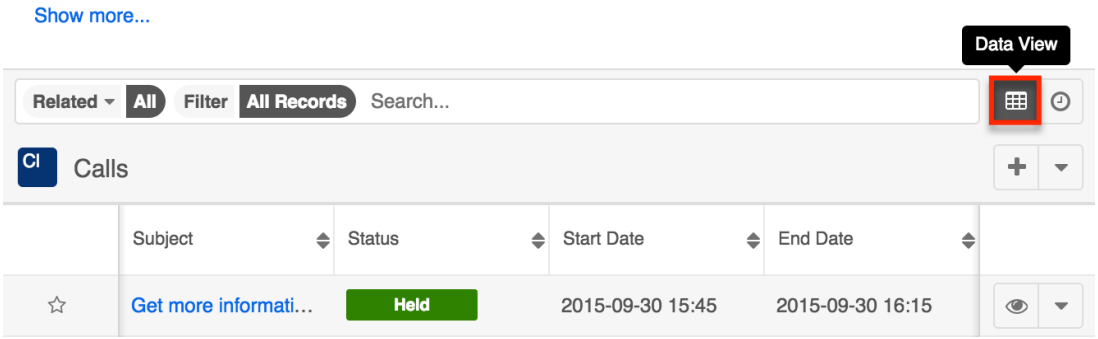

## Show More

The Contacts record view typically display a few key fields (e.g. website, industry, office phone, etc.) on the business card panel with the option to view more fields by clicking the Show More link on the bottom left. Please note that administrators can configure what fields appear on the business card panel via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.



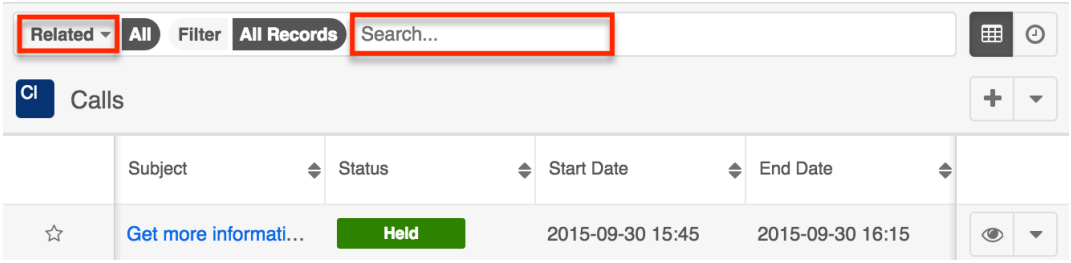

## Subpanels

Beneath a contact record's fields are subpanels containing related records from various modules, campaign interaction history for this contact, and the contact's InsideView information.

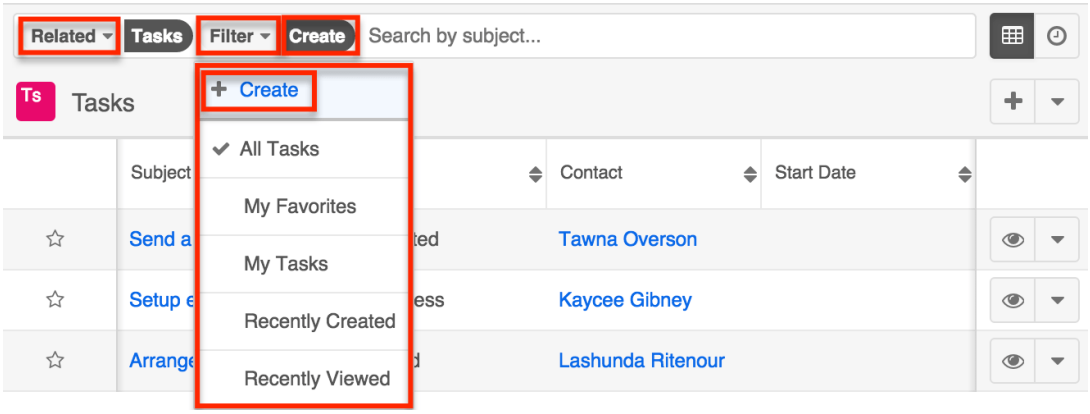



Filter Options

While in Data View, all of the contact record's related records will be displayed beneath the contact record's fields. Users have the ability to search for records which appear in the subpanels as well as filter the view to only display a specific module (e.g. Leads, Opportunities, etc.). To locate a record by name, enter the keyword into the Search bar, and the subpanel(s) with the matching record(s) will appear below. To filter, simply click the Related option to the far left of the Search bar and select the module whose subpanel you wish to view. Filter and search may be combined to only display matching records within a selected module. To see all subpanels to which you have access, simply select "All" in the Related options and remove any text from the search bar. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the page. Returning to the page will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.

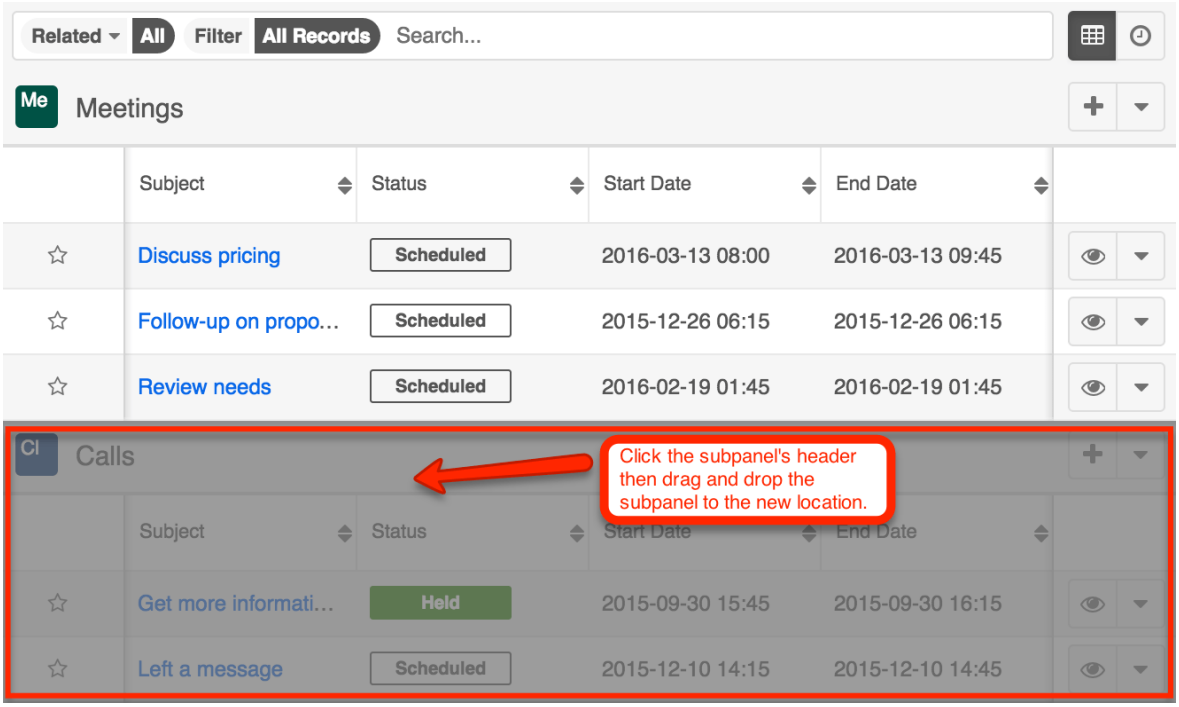



When a Sidecar module (e.g. Opportunities, Leads, Tasks, etc.) is selected from the Related options, you have the option to filter the related subpanels further using one of the available options (e.g. My Favorites, Recently Created, etc.). Please note that you can also create custom filters for related Sidecar modules. Once the related module (e.g. Leads) is selected, either click the Filter option and select "Create" or click "Create" to the right of the Filter option. For more information on creating a related records filter, please refer to the Creating a Related Records Filter section of the Search documentation.




## Reordering Subpanels

Users can easily move subpanels to a new location on the record view by dragging and dropping the subpanel's header. The new subpanel order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared.




## Related Record Subpanels

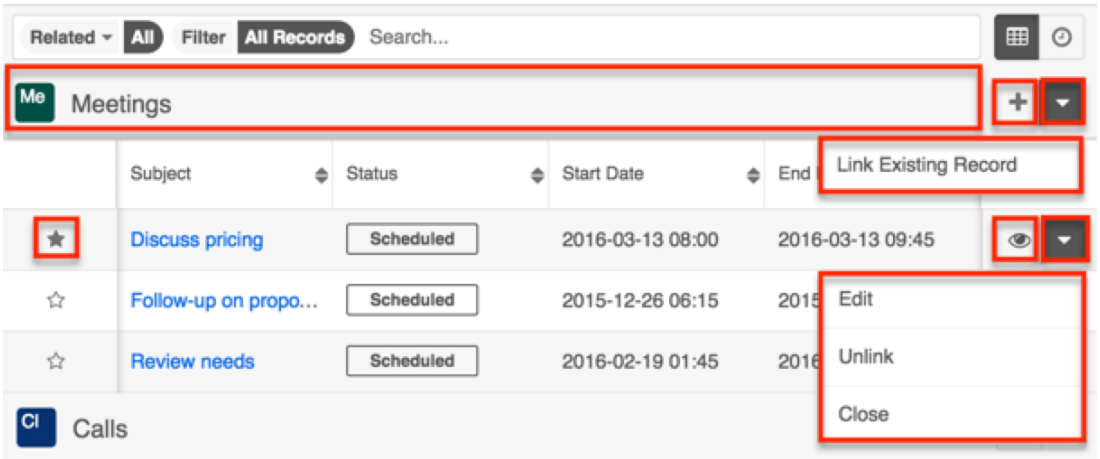
The most common type of subpanels displayed on a contact's record view contain the contact's related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. For example, a contact may be related to only one account but related to multiple opportunities. This means that the related account will be displayed amongst the contact's fields while opportunities will be displayed in a subpanel

beneath the fields.

Users with administrator or developer access have the ability to change the fields (e.g. Subject, Status, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.

Related record subpanels allow the following operations to be performed:

- To view the details of a related record, click the record's name in the subpanel to open it in record view.
- To relate an existing record to the contact, choose "Link Existing Record" from the subpanel's Actions menu, then locate and select the desired record.
- To relate a new record to the contact, click the Plus button to the left of the Actions menu, then complete the record view layout and click "Save".
- To preview the related record, click the Preview icon to the far right of the record's row in the subpanel.
- To inline edit the record directly from the subpanel, choose "Edit" from the Actions menu on the far right of the record's row and click "Save" to preserve the change.
- To delete the contact's relationship to a record, choose "Unlink" from the Actions menu on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To mark the record as a favorite, click the star icon to the left of the desired record's row.
- To collapse or expand the subpanel, click anywhere on the subpanel's header.
- To change the column size in the subpanel, place your cursor on the column divider and when the Left and Right arrow appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.

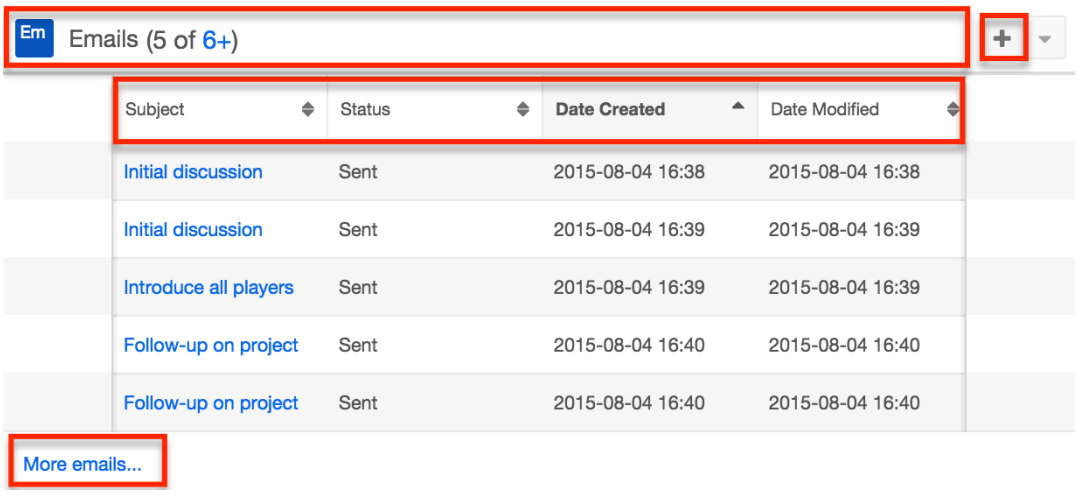


## Emails Subpanel

The Emails subpanel in the [Module Name] module displays both emails implicitly and explicitly related to the account record. Emails in Sugar are implicitly related to records in Sugar that match an email address in the From, To, or Cc fields in the email. This implicit relationship is made for emails sent from Sugar as well as any email imported into Sugar via Inbound email accounts or email archiving. While composing an email or relating an existing email to a record, users have the ability to set an explicit relationship via the flex relate field by Relating Emails. This allows the email to be explicitly related to a single record from one of many modules.

The Emails subpanel allows the following functions to be performed:

- To view the details of an email, click the subject in the subpanel to open it in detail view.
- To collapse or expand the subpanel, click anywhere on the subpanel's header.
- Click "+" to create a new email that will have an implicit relationship with this record.
- Sort the emails by Subject, Status, Date Created, Date Modified, or Assigned User.
- Click "More emails" to see any additional emails hidden by the default view.
- To change the column size in the subpanel, place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. For more information on resizing columns, please refer to the Column Resizing section of this documentation.
    - Note: The subpanel column width will not be preserved when you navigate away from the page.

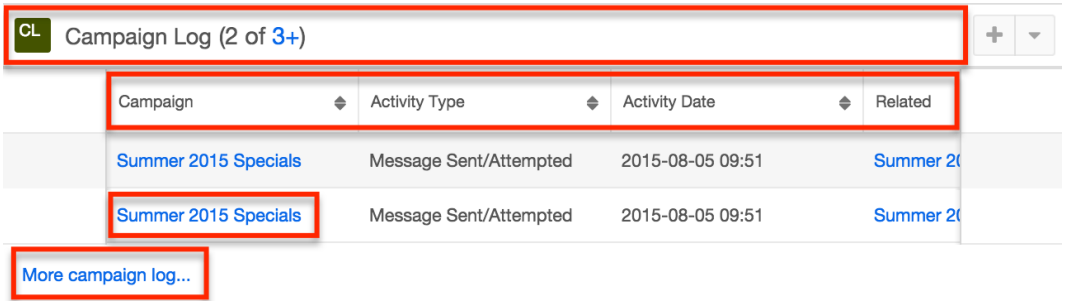



## Campaign Logs Subpanel

The Campaign Logs subpanel contains historical information regarding a contact record's interaction with all Sugar campaigns. When a mass marketing campaign is sent to a contact (or manually marked as sent in the case of non-email campaigns), the related campaign activity information will appear within the Campaign Logs subpanel. This information mirrors the "View Status" page available from within each individual campaign and shows activities such as when a campaign was sent, when the contact viewed the campaign message, when the contact clicked a tracked link within the campaign, etc. Since this subpanel contains historical campaign interactions for the contact, it cannot be used to associate a contact with a campaign or otherwise manage a campaign or target list. For more information on associating a contact with a campaign, please refer to the Adding Contacts to a Target List section of this documentation. For more information on campaigns, please refer to the Campaigns documentation.

The Campaign Log subpanel allows the following functions to be performed:

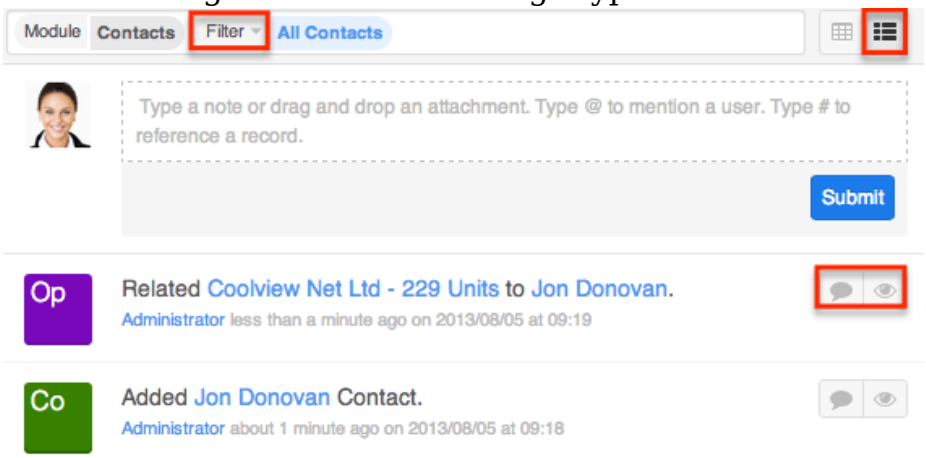
- To view the details of a campaign, click the campaign's name in the subpanel to open it in detail view.
- Sort the campaigns by Campaign Name, Activity Type, Activity Date, or Related.
- To collapse or expand the subpanel, click anywhere on the subpanel's header.
- To load the next set of records in the subpanel, click the More campaign log link on the bottom left of the subpanel.
- To change the column size in the subpanel, place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. For more information on resizing columns, please refer to the Column Resizing section of this documentation.
    - Note: The subpanel column width will not be preserved when you navigate away from the page.




## Activity Stream

Record view's activity stream displays user posts and record posts specific to the individual contact record. To view the record's activity stream, simply click the

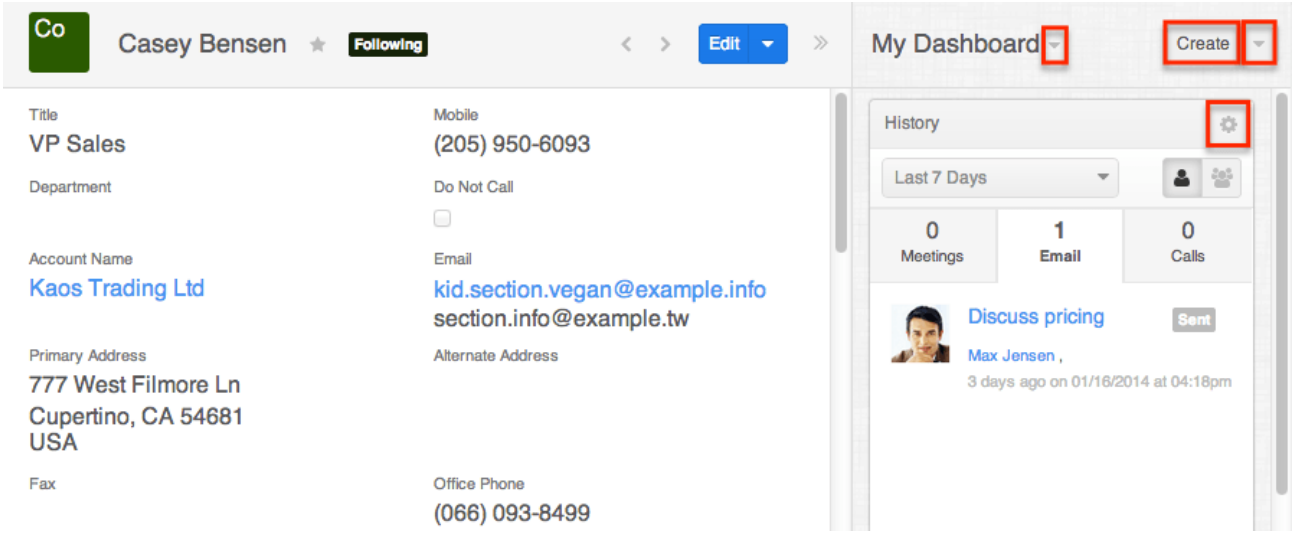
Activity Stream button below the contact's fields. Users can view all posts in the record view's activity stream even if they do not follow the record in Sugar. Please note that you must follow the record if you wish to view the record view posts via the Home page or List View activity stream. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts by clicking the Comment button to the far right of each post, entering your comment, then clicking "Reply". You can also preview the record referenced in the record post by clicking the Preview button. The activity stream can also be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box then selecting the desired message type.




## Intelligence Pane

An intelligence pane displays to the right of the contact's record view and provides users with valuable information specific to the contact's interaction, activities, etc. The Help Dashboard normally displays by default along with the Record View Help dashlet and Learning Resources dashlet. The Record View Help dashlet provides users with a brief introduction to the module along with some instructions to help users utilize and navigate around the record view. A link to the corresponding documentation (e.g. Contacts documentation) in the Application guide is also provided within the Help dashlet. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard, which will display some stock dashlets (e.g. Planned Activities dashlet, History dashlet , etc.) by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may choose to view any of their dashboards using the triangle to the right of the current dashboard's name and may create other dashboards for use with the Contacts module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do not wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Contacts module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.




## Editing Contacts

Contacts may be edited at any time to update or add information to the record. You can make changes to existing contact records via the Contacts record view and quick create forms. Record view is available within the Contacts module and includes all of the Contact fields you should need.

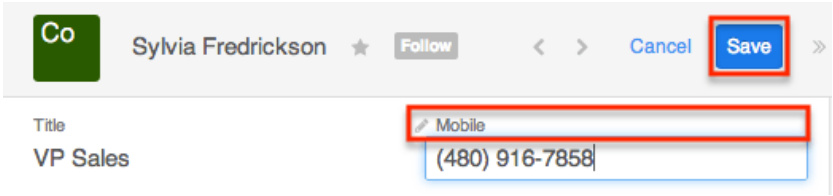
Please note that your ability to edit contacts in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure both the Contacts record view and quick create via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

### Editing Inline Via Record View

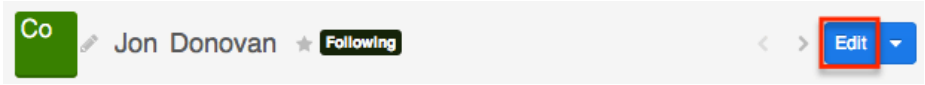
Users can edit individual fields on a Contact's record view without entering the full edit mode by clicking the field name. Fields which are available for inline editing will display a pencil icon when hovering on the field name or value. This will allow users to type or select a new value. Click "Save" to preserve the changes made to

the field.

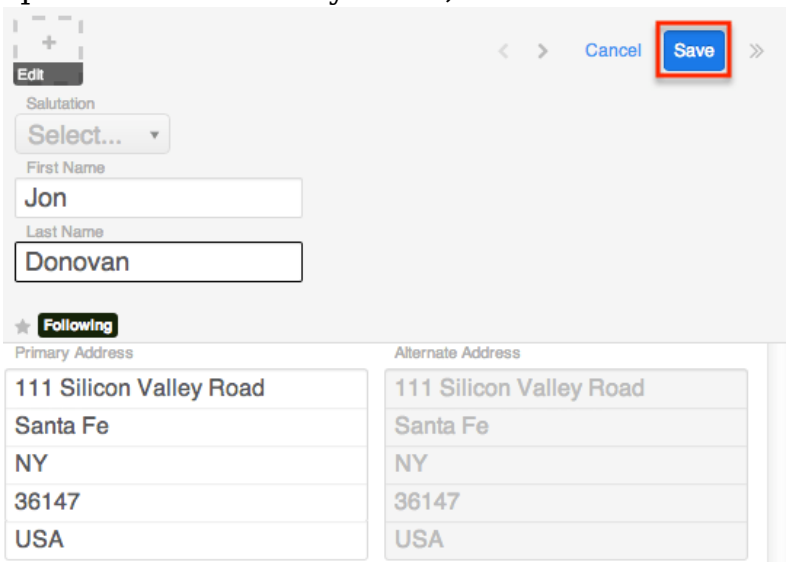



## Editing Via Record View

You can edit contacts via the Record view by clicking the Edit button on the upper right of the page. Once the record view layout is open, update the necessary fields, then click "Save" to preserve your changes.

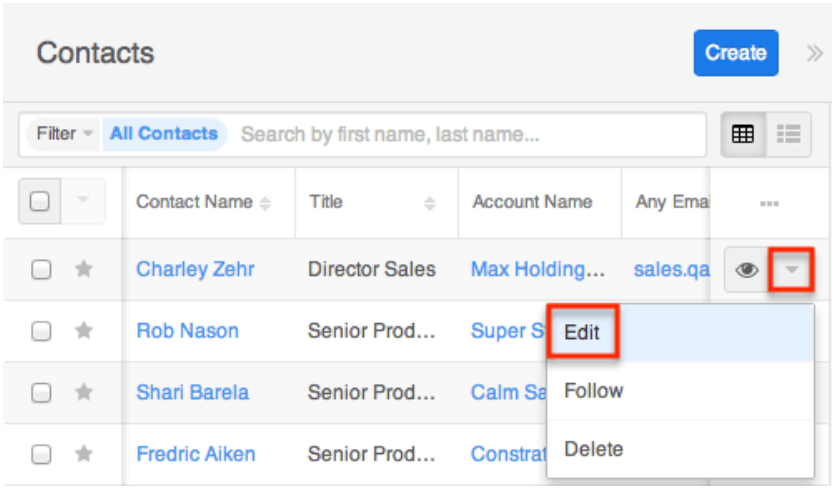



Update the necessary fields, then click "Save" to preserve your changes.

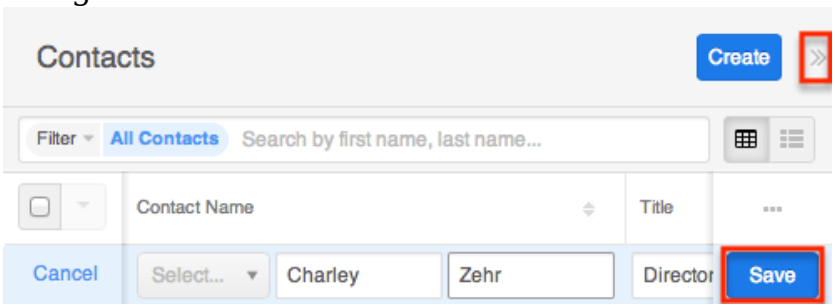



## Editing Inline Via List View

You can also edit individual fields on the Contacts list view without entering the full edit mode. Simply click the Record Actions menu to the far right of the record's row and select "Edit".




The contact will become editable, inline as a shortened version of the record view layout. Click the double arrow to the right of the "Create" button to expand the editing window. Update the necessary fields, then click "Save" to preserve the changes.




Note: Text area fields are not inline editable from list views.

## Deleting Contacts

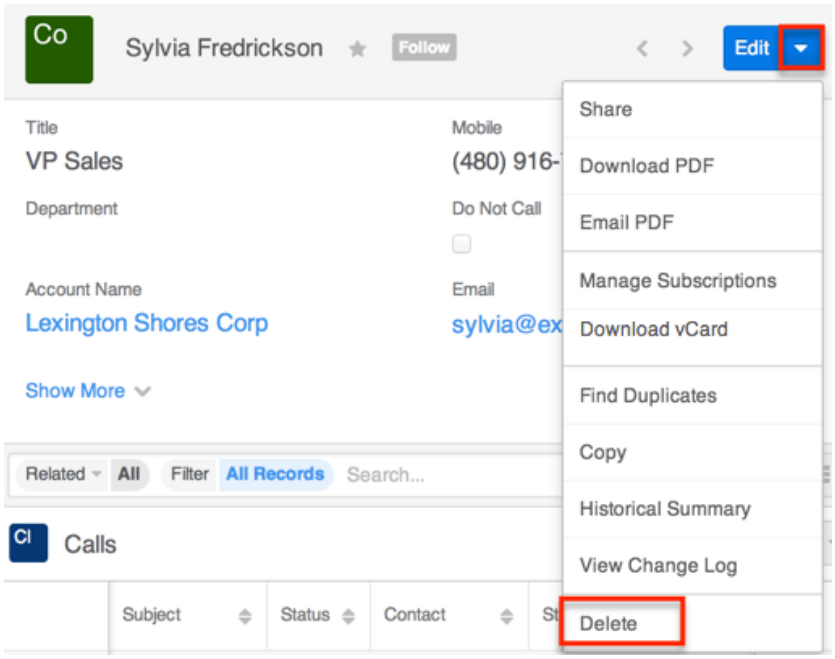
If a contact record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Contact's record view or list view. Deleting via the record view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting contact records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

Please note that your ability to delete contacts may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

### Deleting Via Record View

Use the following steps to delete a contact record via the record view:

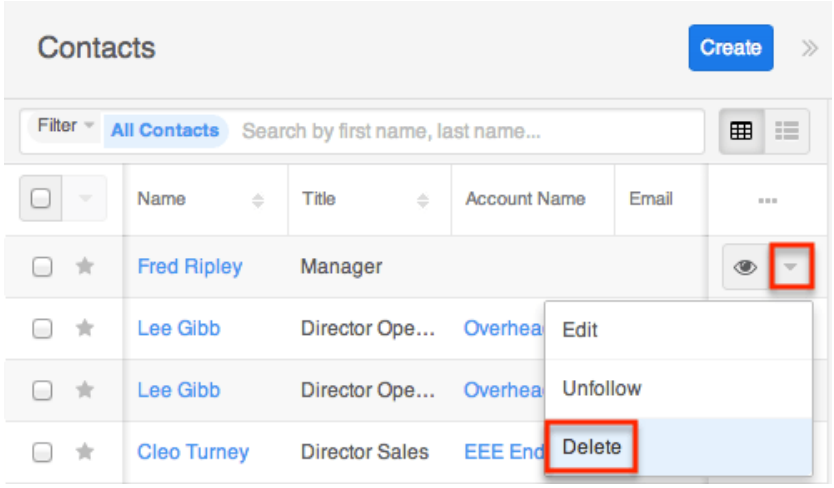
1. Navigate to a contact's record view.
2. Select "Delete" from the Actions menu.




3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

## Deleting Via List View

1. Navigate to the Contacts list view by clicking the Contacts module tab.
2. Use the Module Search to find the Contact record you wish to delete.
3. Click the Record Actions Menu to the far right of the record's row and select "Delete".

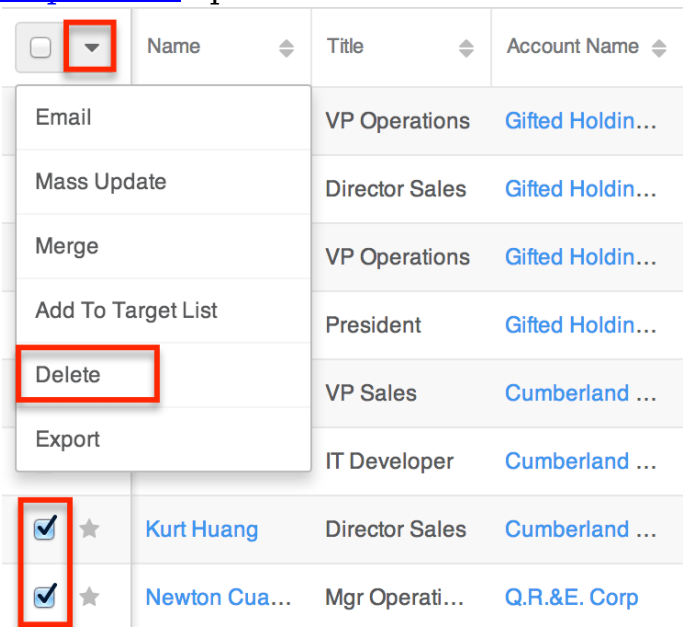



4. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

### Mass Deleting Via List View

Use the following steps to delete one or more contact records via the list view:

1. Navigate to the Contacts list view by clicking the Contacts module tab.
2. Use the Module Search to find the Contact records you wish to delete.
3. Select the desired contact records individually or using the checkbox dropdown's options. Choose "Delete" from the Actions menu.



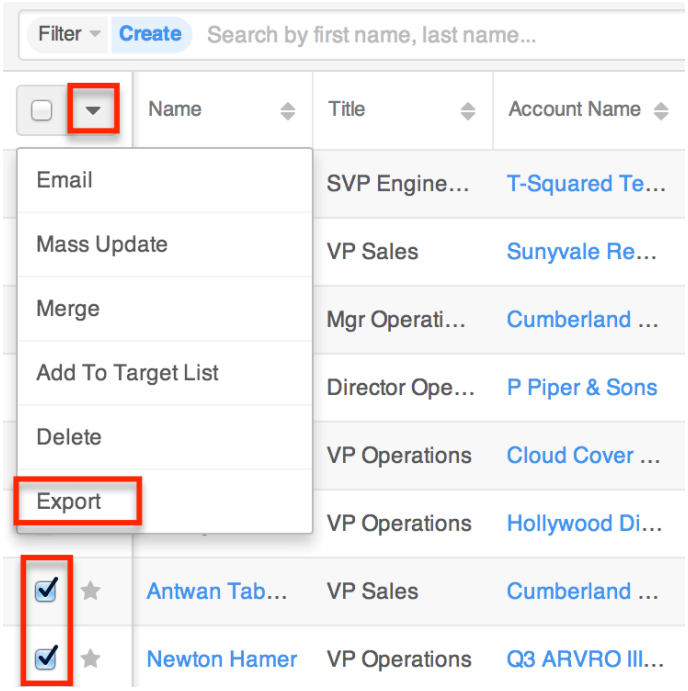

4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

You can also use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to delete more than 1000 records or delete a specific group of records on the list view, please use the in module search to perform the deletions in smaller batches.

## Exporting Contacts

Sugar's Export option allows users to download all fields for the selected contacts to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Contact data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered contacts back into Sugar. For more information on updating existing records via import, please refer to the Import documentation.Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of contact records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Contacts may be exported from the Contacts list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for contacts and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.



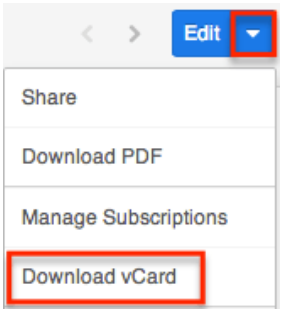

Please note that your ability to export contacts from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

## Downloading a Contact's vCard

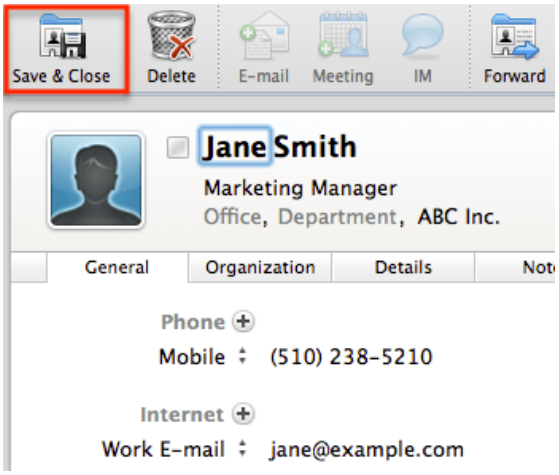
vCards are electronic business cards that are exchanged through applications such as email and web browsers. In addition to being able to create a contact from an existing vCard , you can also download a vCard from Sugar in order to transfer the contact's information to another application.

The following steps cover downloading a vCard and saving it as a contact in Microsoft Outlook as an example:

1. Navigate to a Contacts record view.
2. Select "Download vCard" from the Actions menu to download the vCard file.




3. Open the downloaded file in your mail or address book application. For this example, double clicking opens the vCard in Outlook.
4. Make any necessary changes to the information, then click "Save & Close" to save this lead in Outlook.



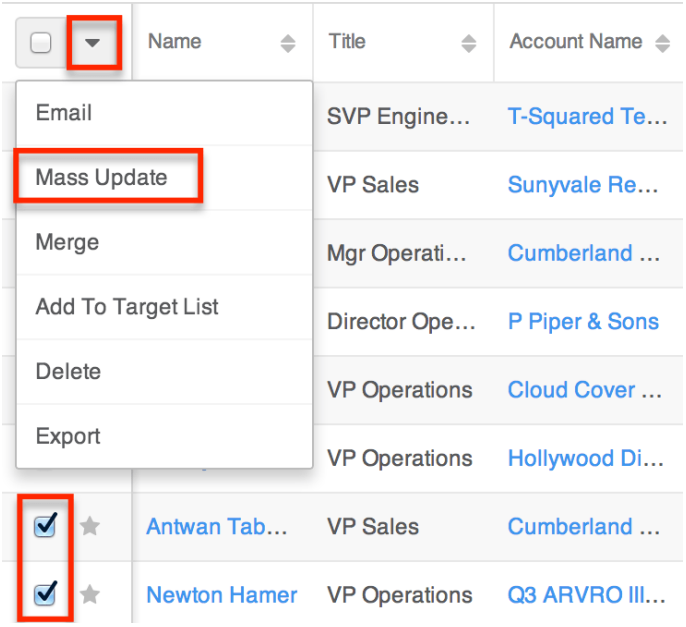

## Mass Updating Contacts

Mass Updating allows users to make the same change to multiple contact records at once from the Contacts list view. Users with administrator or developer access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide.You can use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to update more than 1000 records or update a specific group of records on the list view, please use the filter option in module search to perform the updates in smaller batches.

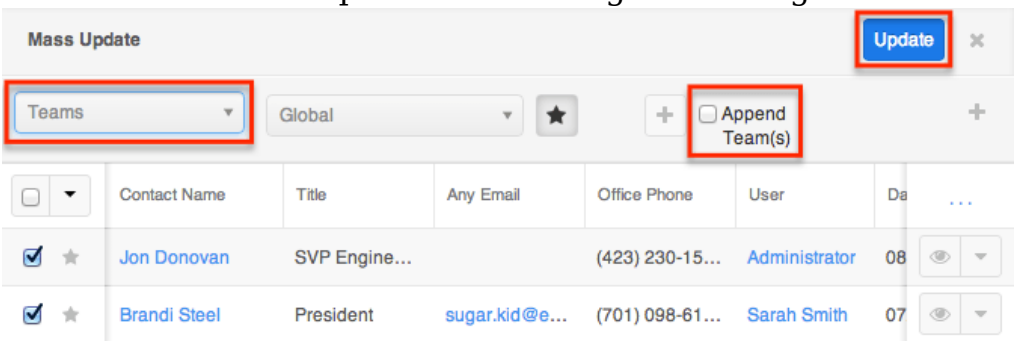
Please note that your ability to mass update contacts may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

Use the following steps to mass update contact records from the list view:

1. Navigate to the Contacts list view by clicking the Contacts module tab.
2. Use the Module Search to find the Contacts you wish to modify.
3. Select the desired contacts individually or using the checkbox dropdown's options then choose "Mass Update" from the Actions menu.




4. Scroll to the Mass Update panel and set values for the fields you wish to alter.
   - To add additional fields for mass update, click the Plus icon to the right of the dropdown list.
   - Note: For the Teams field, mark "Append Team(s)" to add the teams specified here to any existing team assignments. Not marking the checkbox will replace the existing team assignment with the new one.




5. Click "Update" to save the changes to all of the currently selected contact records.

## Recalculating Calculated Values

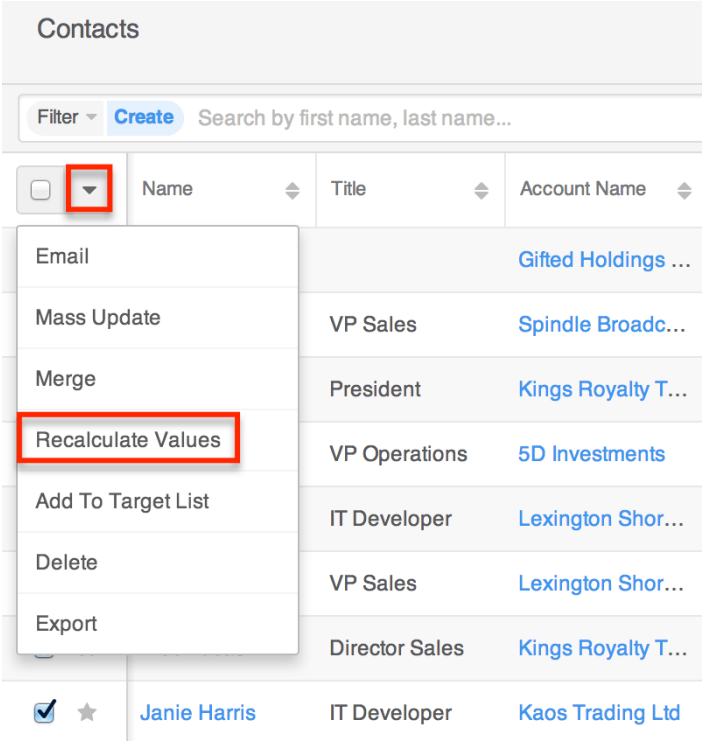
This feature allows calculated values to be recalculated following the addition or alteration of a calculated field in Studio. For more information on calculated fields, please refer to the Studio documentation in the Administration guide. Sugar allows you to select up to 1000 records at a time for recalculating values. If you desire to

recalculate values for more than 1000 records, you will need to perform the recalculation in several batches.

Note: This action will not appear unless the user is an Admin or has developer-level access to the module and if there is at least one calculated value in that module. Please note that your ability to recalculate values may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Recalculate Values option.

The following steps cover recalculating values for records from the Contacts list view as an example:

1. Navigate to the Contacts list view by clicking the Contacts module tab.
2. Use the list view's Module Search to identify contacts you wish to update.
3. Select the desired contacts then choose "Recalculate Values" from the Actions menu.




## Finding Duplicate Contacts

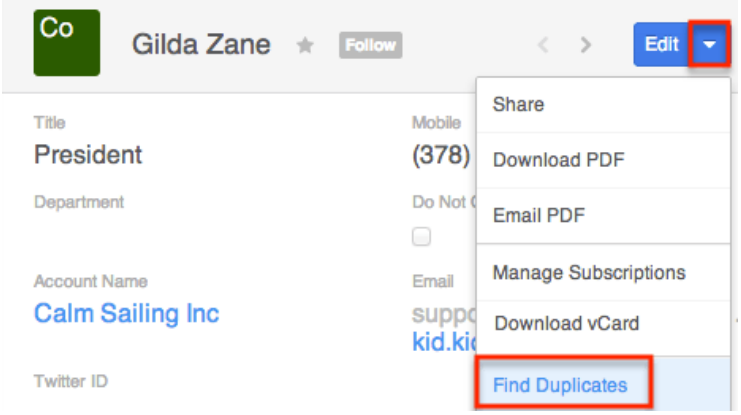
Between multiple users working in Sugar, importing new records, and converting leads, it is possible for duplicate contact records to be accidentally input to the system. Before creating a new contact record, a good practice is to first check that the contact does not already exist in Sugar. You can locate duplicate records for cleanup using module search from the Contacts list view. Searching for contacts

with similar names or other information can turn search into a powerful, duplicates-finding tool. Sugar also provides a wizard for finding potential duplicates that is available from the Contacts record view and may be used as shown below. If duplicate contact records are detected, you can perform a merge per the Merging Contacts section of this documentation.

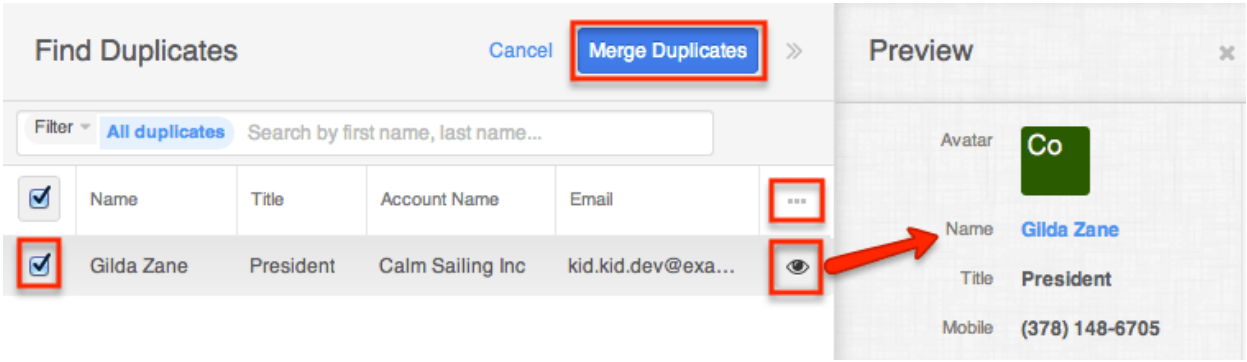
Please note that your ability to use the Find Duplicates action may be restricted by any role which prevents contact deletion. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Find Duplicates option.

Use the following steps to locate duplicate contacts using the Find Duplicates option from the Contacts record view:

1. Navigate to an contact's record view.
2. Choose "Find Duplicates" from the Actions menu.




3. Potential duplicate contact records will be listed on the Find Duplicates page. Select the duplicate record(s) you wish to merge then click "Merge Duplicates".
    - You can preview the duplicate record's details by clicking the Preview button to the far right of the records row.
    - You can search for specific records from the Contacts list view if you wish to check for more possible duplicates. For more information on performing a search, please refer to the Module Search section of this documentation.
    - You can also click the Column Selection icon above the Preview button to change the list of fields that display on the list view column headers.




Once you click "Merge Duplicates", the merging process with the current record will begin. For instructions on performing the merge that follows, please refer to Steps 3-9 of the Merging Via List View section of this documentation.

## Merging Contacts

When duplicate records are identified in Sugar, you have the option to merge two or more contacts into a single record. Once the merge is complete, the duplicate contact record(s) will be deleted, and the primary record will remain. Please note that all relationships belonging to the duplicate contacts will be merged to the primary record meaning that any calls, meetings, cases, etc. related to the duplicate contact record(s) will automatically be related to the resulting, merged contact record.

Note: Date Created, Date Modified, and Password field types are not supported when merging duplicate records in Sugar.

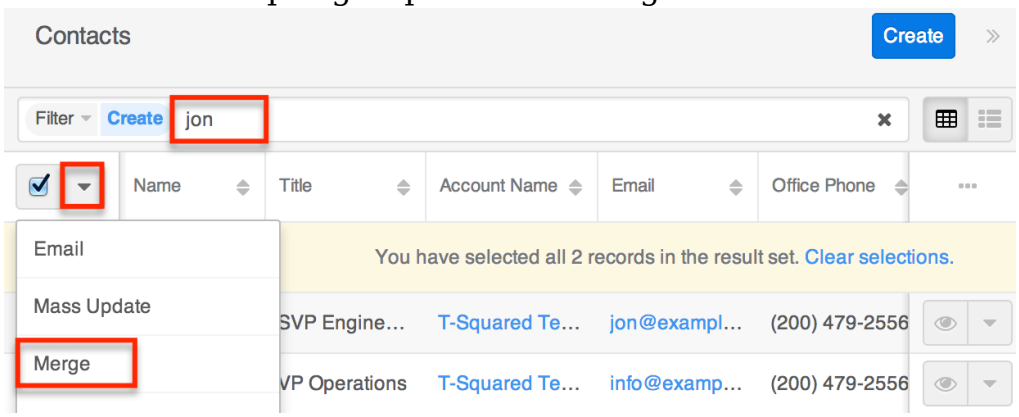
### Merging Via List View

Module Search may be used to identify duplicate contacts by, for example, searching for contacts with similar names or related contacts. Once your search has identified duplicate contacts, you can merge them directly from the Contacts list view.

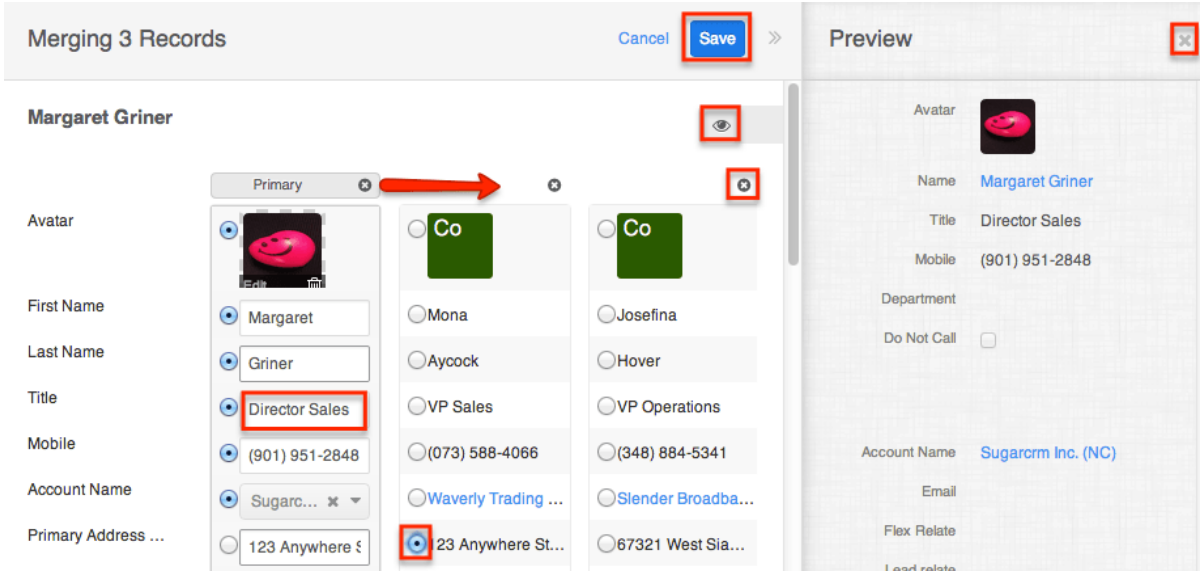
Use the following steps to merge contacts via the list view:

1. Use the Module Search to identify duplicate contacts.
2. Possible duplicates will be displayed in the list view. Select the duplicate record(s) that you wish to merge.
    - Please note that up to five records may be merged at once in Sugar. An error message ("Invalid number of records passed. The valid range is from 2 to 5 records.") will appear if more than five records are selected

when attempting to perform a merge.




3. Select "Merge" from the Actions menu to display the Merging Records page. The primary record's field values are displayed on the left while other record's values are in columns to the right. For convenience, fields with differing values will appear on the top of the list. Saving the merge will preserve only the field values marked with the radio button into a single record.
    - Note: The Password field is not available for merge in Sugar.




If 3 or more records are selected to be merged, an X icon will appear at the top right of each record. Clicking the "X" will remove the record from the merge process but will not delete the record.

4. To change which record is considered the primary, drag and drop the Primary label on the top of a different column.

5. Review the field values in each column and click the radio button to the left of the value that should appear on the final record. You can also manually type or select a new value for any field as necessary.

    - Note: Fields you do not have Edit access for cannot be edited on the merging records page.
6. Preview what the final, merged record will contain as you work by clicking the eye icon to display the preview in the Intelligence Pane.
7. Click "Save" once all fields you wish to appear on the single, merged record have their radio buttons selected.
8. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Confirm" to proceed.

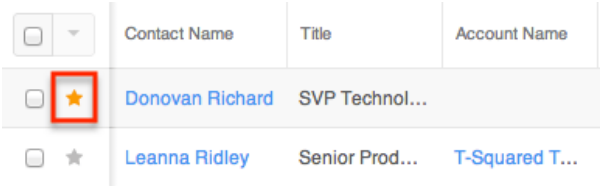
## Favoriting Contacts

Each Sugar user has the option to designate their own favorite contacts which are important or will be viewed often.Once records are marked as favorites, use the My Favorites filter in the Contacts Module Searchto retrieve your favorites or select from your most recent favorites directly from the Contacts module tab .

### Favoriting Via List View

Use the following steps to mark records as favorites via the Contacts list view:

1. Navigate to the Contacts list view by clicking the Contacts module tab.
2. Use the Module Search to find the Contact records you wish to mark as favorites.
3. Click the star icon on the left of each desired contact's row.

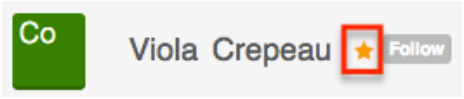



4. To remove the contact as a favorite, click the star again to revert it to white.

### Favoriting Via Record View

Use the following steps to mark records as favorites via the Contact's record view:

1. Navigate to a contact's record view.
2. Click the star icon to the right of the contact's name in the upper left of the record view to designate it as a favorite.

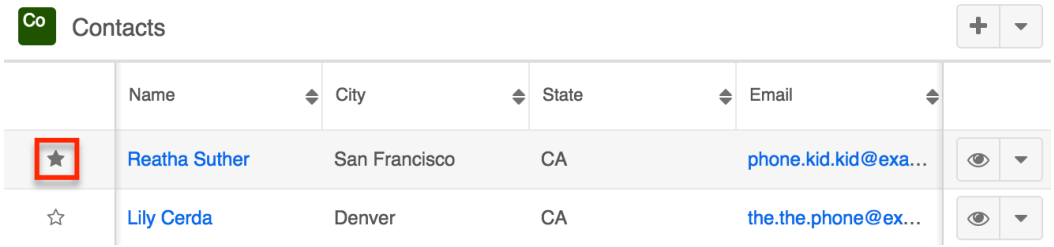


3. To remove the contact as a favorite, click the star again to revert it to white.

### Favoriting Via Subpanel

Use the following steps to mark contact records as favorites via the subpanel in related modules:

1. Navigate to a related module's record view (e.g. Accounts).
2. Click the star icon to the left of the desired record's row in the Contacts subpanel.




3. To remove the contact as a favorite, click the star again to revert it to white.

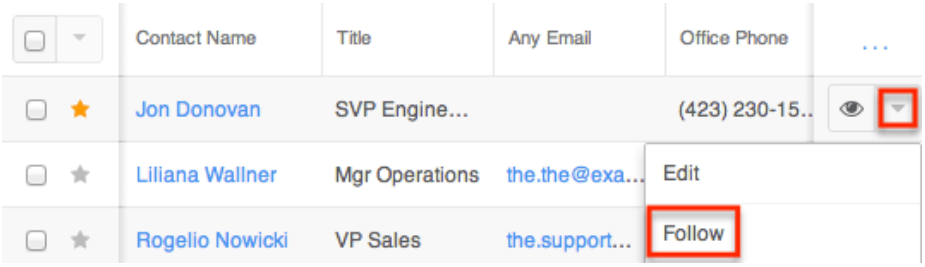
## Following Contacts

Users can also choose to follow specific contact records to which they have access to in Sugar by clicking the Follow button (If grayed out) to the right of the contact's name. This allows each user to personalize their activity streams by specifying which records' posts should appear on the activity stream displayed on their Home page and Contacts list view. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. Should a user lose access to a record in Sugar, they will automatically stop following that record.

### Following Via List View

Use the following steps to mark a record to follow via the Contacts list view:

1. Navigate to the Contacts list view by clicking the Contacts module tab.
2. Use the Module Search to find the Contact records you wish to follow.
3. Click the Record Actions menu to the far right of the records row and select "Follow".

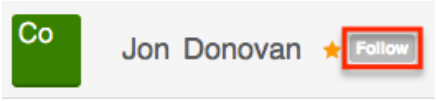



4. To unfollow the contact, click the Record Actions menu then select "Unfollow".

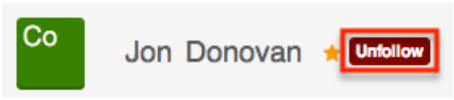
### Following Via Record View

Use the following steps to mark a record to follow via the Contacts record view:

1. Navigate to a Contacts record view.
2. Click the Follow button to the right of the Contact's name.

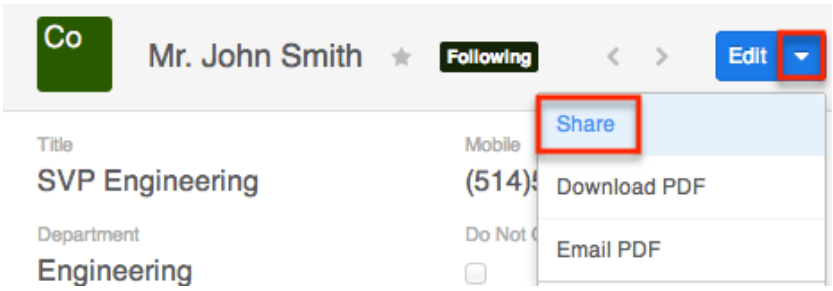



3. To unfollow the contact, click the Follow button again to revert it to gray.




## Sharing Contacts

Individual Contact records can be shared with other users in your organization by sending an email with the record's link directly from the record view. In the contact's record view, select "Share" from the Actions menu which will open a Compose Email window including the URL of the contact record. Enter the recipient(s) email address in the To field then click "Send".

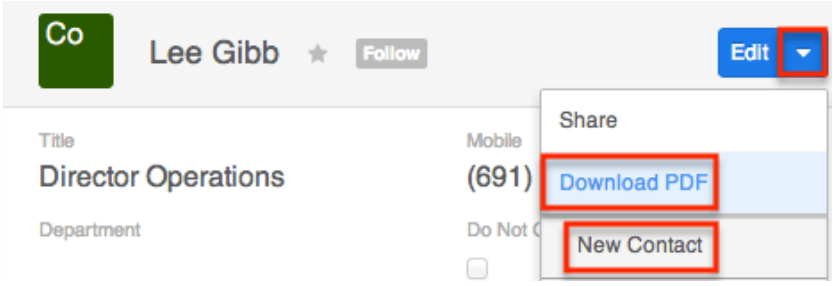



Users can simply click the link in the email to access the contact record in Sugar. Please note that the user must be logged into Sugar in order to access the record. Users will only be able to view the shared record as allowed by their team

membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

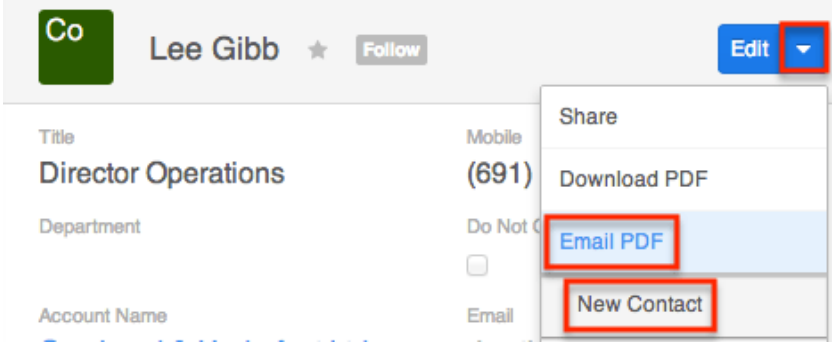
## Downloading Contact Information as a PDF

Users have the option to download contact information as a PDF file via the Contacts record view by clicking the Actions menu and selecting "Download PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Download PDF option in the Actions menu. Simply select one of the templates to generate the PDF file to view or save onto your local machine. Please note that the Download PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.



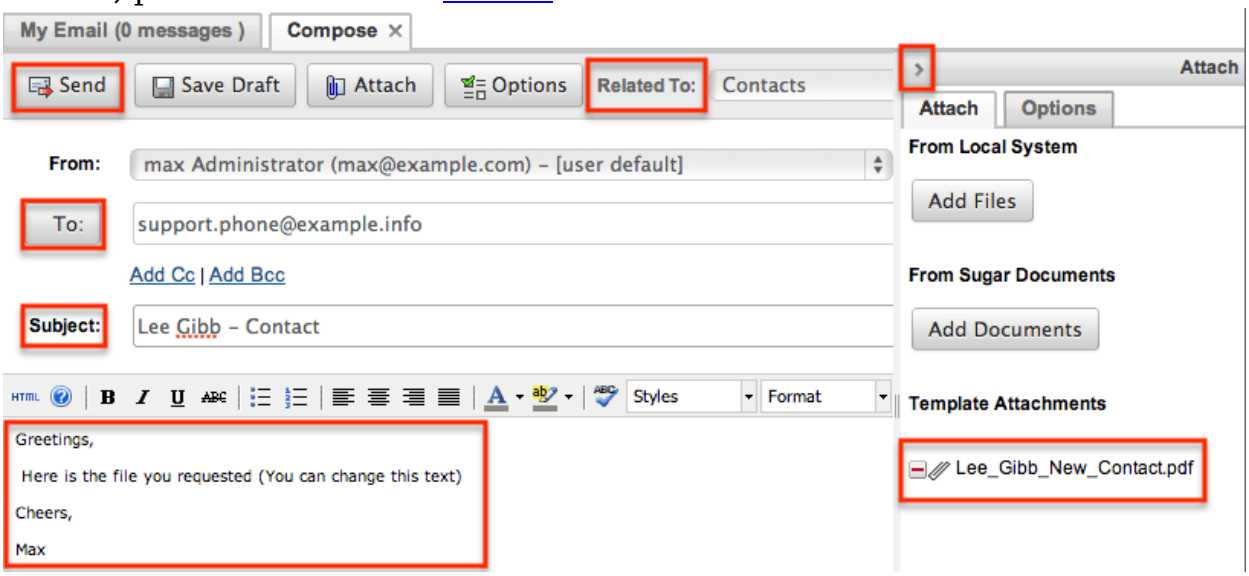

## Emailing Contact Information as a PDF

Users also have the option to email contact information as a PDF file using any of the available Contacts module templates using Sugar's email client. Simply click the Actions menu and select "Email PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Email PDF option in the Actions menu.




Select one of the templates to open a Compose window in the Emails module. The

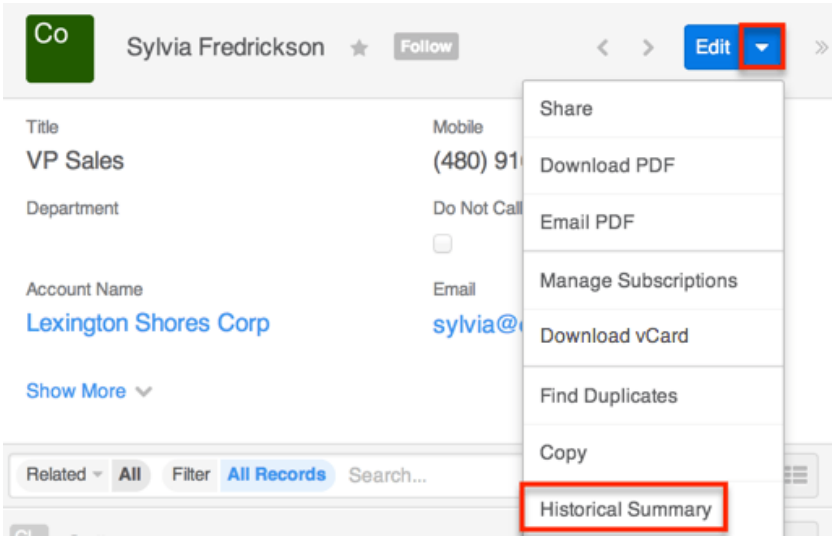
email's To field will automatically populate with the email address of the contact record, and the Subject field will display the contact's name. The email is automatically related to the contact record, and the chosen contact PDF will be attached. You can update the fields as necessary and enter a body for the email message then click "Send". For more information on sending emails via the Emails module, please refer to the Emails documentation.




Please note that the Email PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.

## Viewing Activities' Historical Summary

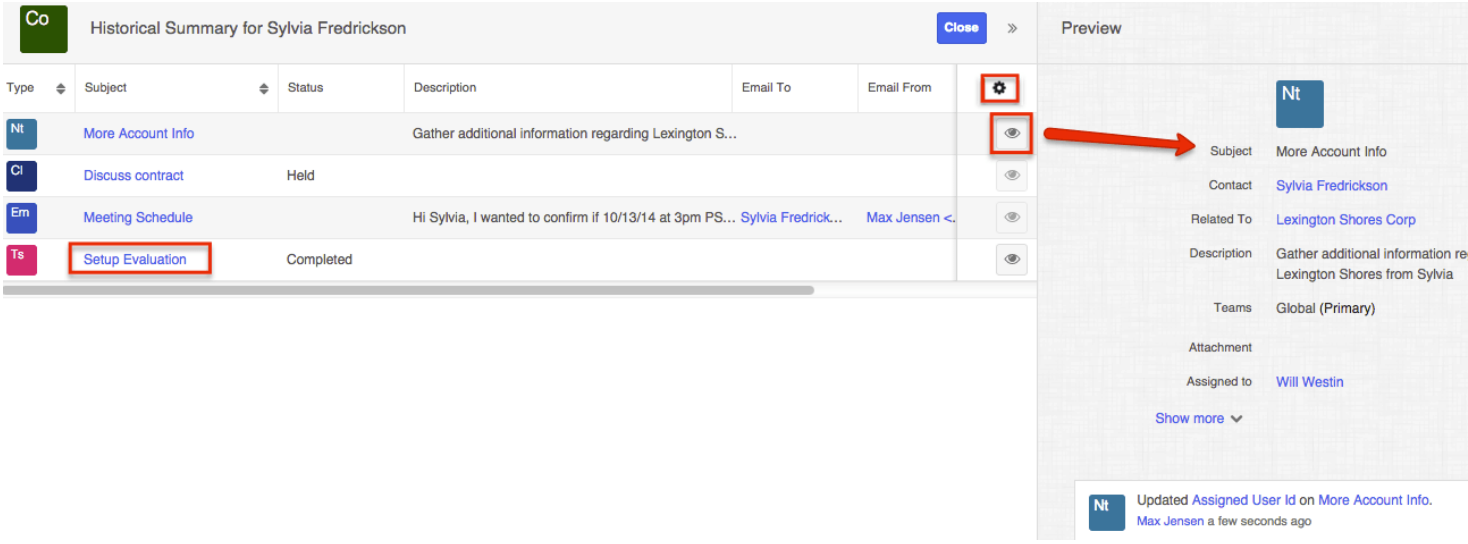
Users can easily view quick details for the various related activities (e.g. calls, meetings, notes, emails, etc.) that have taken place via the Historical Summary option. Simply navigate to the contact's record view and select "Historical Summary" from the Actions menu to view the historical activities related to the contact in one place.




The Historical Summary page will display each activity's type, subject, status, description, date modified, etc. and you can simply click the activity's name to view the full details for each activity. Please note that you can add Date Created and User fields by clicking the Column Selection icon to the far right of the list view column headers. You can also preview the activity record via the intelligence pane by clicking the Preview icon to the far right of each record's row. It will provide users with key information regarding the record as well as the related activity stream information (if any). For more information on activity streams, please refer to the Activity Streams documentation. Please note that preview is only available for modules (e.g. Task, Note) using the Sidecar user interface.

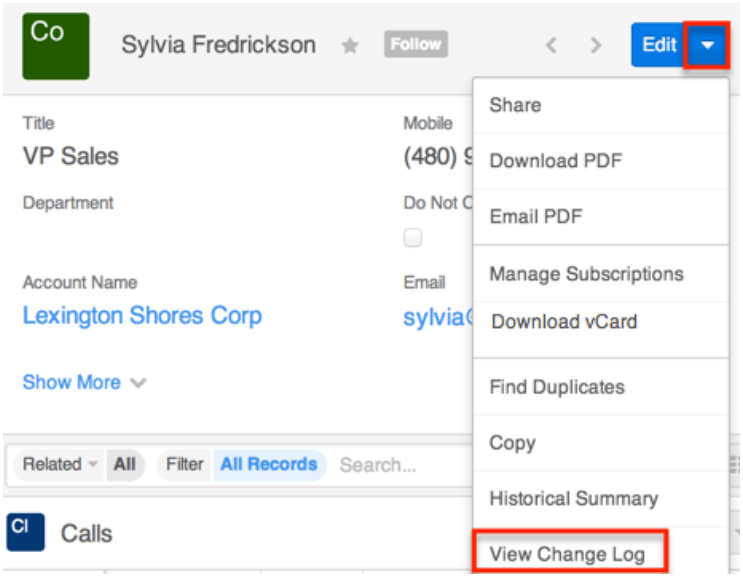
The historical summary list view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the system's default column order.

Users can also easily adjust the size of columns in the historical summary list view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the Historical Summary list view is different from the default column width

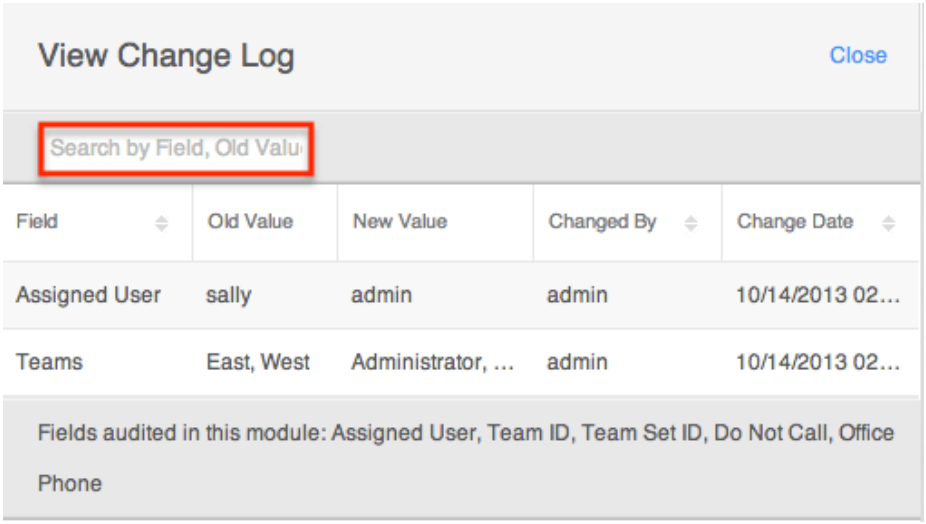



## Viewing Contact Change Logs

Changes made to each contact record are tracked over time, and users are able to view the history of changes via the change log in each contact's record view. To view the change log, navigate to a contact in record view and select "View Change Log" from the Actions menu. Please note that only fields marked as "Audit" in Admin > Studio will be displayed in the change log. For more information on designating for audit, please refer to the Studio documentation in the Administration guide.

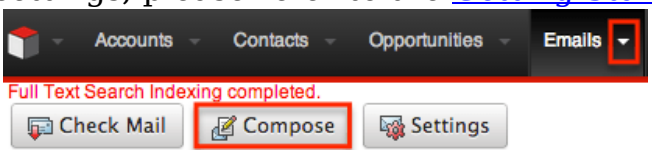



Once the change log opens, you can view the details of historical changes and can search by field name, old value, etc. by entering the keyword into the search box.




## Emailing Contacts

Sugar allows users to compose and send outbound emails to contacts. There are various ways to send outbound mail to contacts including emailing via the Emails module, Emails quick compose, Contacts module, campaigns, and workflows. Please note that administrators in Sugar must first configure the outbound mail server for the system via Admin > Email Settings in order for users to send outbound emails. For more information on setting up the system email settings, please refer to the Email documentation in the Administration guide. Users will also need to have their email settings configured in their user preferences prior to sending outbound email from the Emails module, Emails quick compose, or Contacts module. For more information on setting up your user preferences' email settings, please refer to the Getting Started documentation.



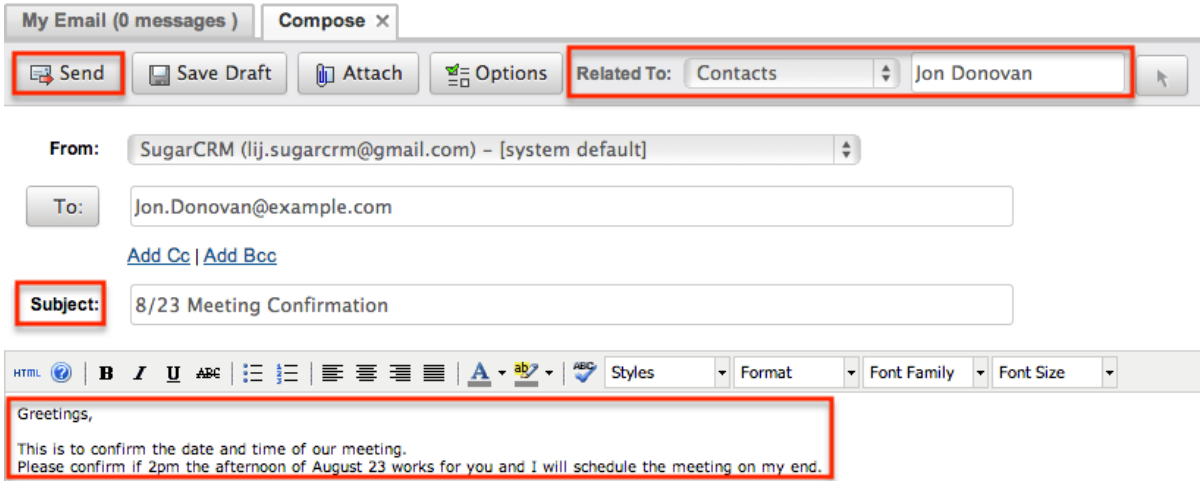

### Emailing Via the Emails Module

Use the following steps to compose and send an email to a contact via the Emails module. For more detailed information on sending emails via the Emails module, please refer to the Emails documentation.

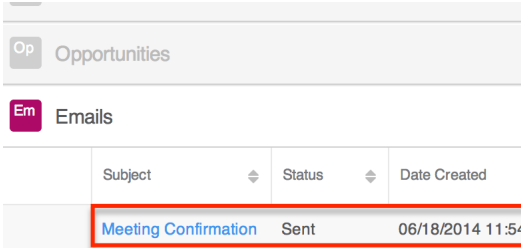
1. Navigate to the Emails module by clicking the Emails module tab.
2. Click the Compose button on the upper left of the Emails module.
3. For the "Related To" field, select "Contacts" as the module then type or select the desired contact's name. The email's To field will automatically populate

with the name and email address of the selected contact record.

4. Enter a subject and body for the email message then click "Send".



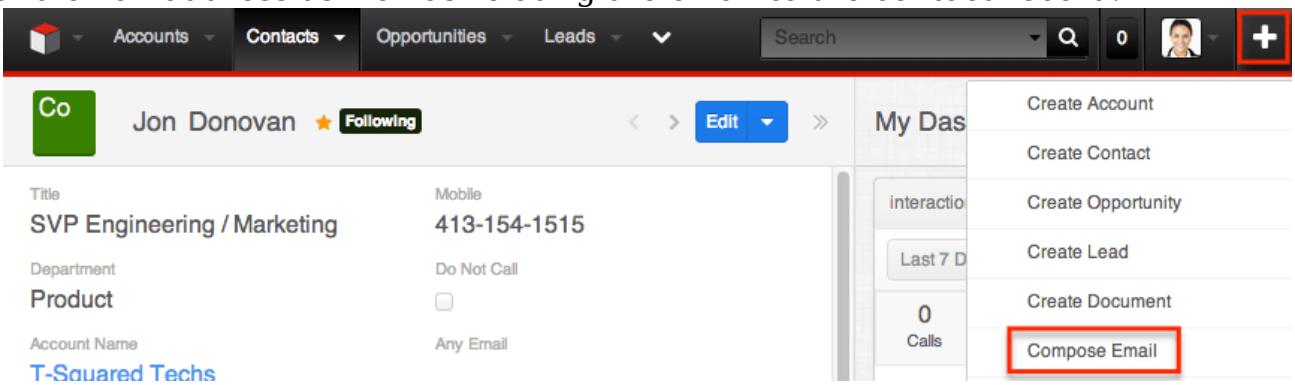

Once the email is sent successfully, the email record will appear in the History dashlet and Emails subpanel on the contact's record view.




## Emailing Via Quick Compose

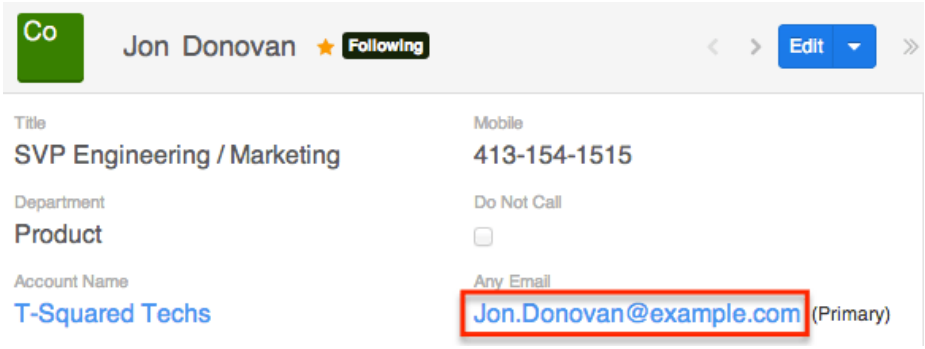
The quick compose option allows users to compose emails from various places in Sugar without navigating away from the current page.

While viewing a contact record, you can select "Send Email" from the Quick Create menu on the top right of any Sugar page. Quick creating an email while viewing a contact's record view automatically populates the To field with the contact's name and email address as well as relating the email to the contact record.

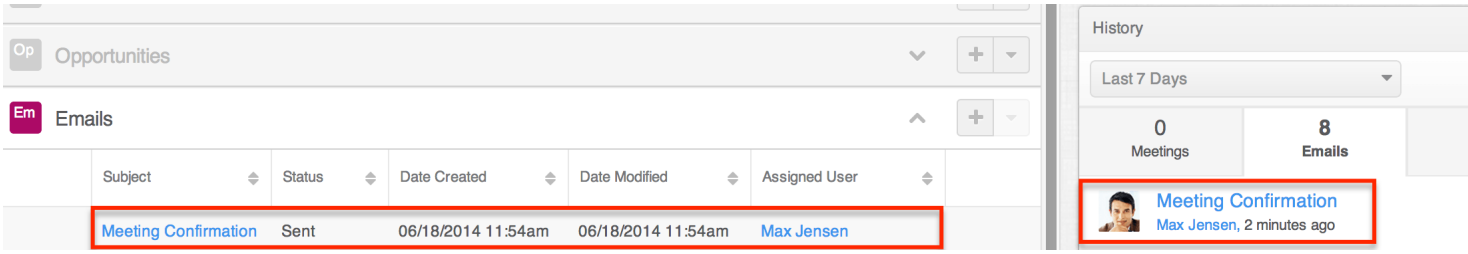



Users can also use Quick Compose by clicking a contact's email address anywhere it is displayed as a link. Clicking the email address automatically populates the To

field with the contact's name and email address as well as relating the email to the contact record.




Once the email is sent successfully, the email record will appear in the History dashlet and Emails subpanel of the contact record. For more information on sending emails via quick compose, please refer to the Emails documentation.

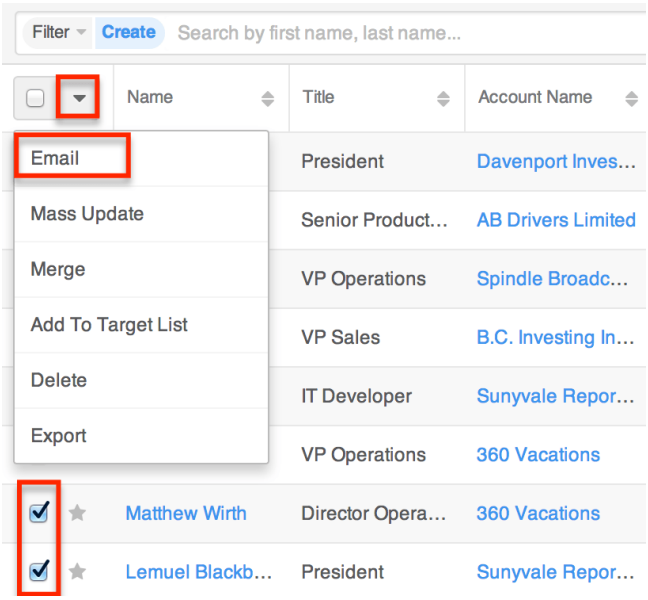



## Emailing Via Contacts List View

One or more contacts may be emailed at a time from the Contacts list view simply by selecting the Email option from the Actions menu.

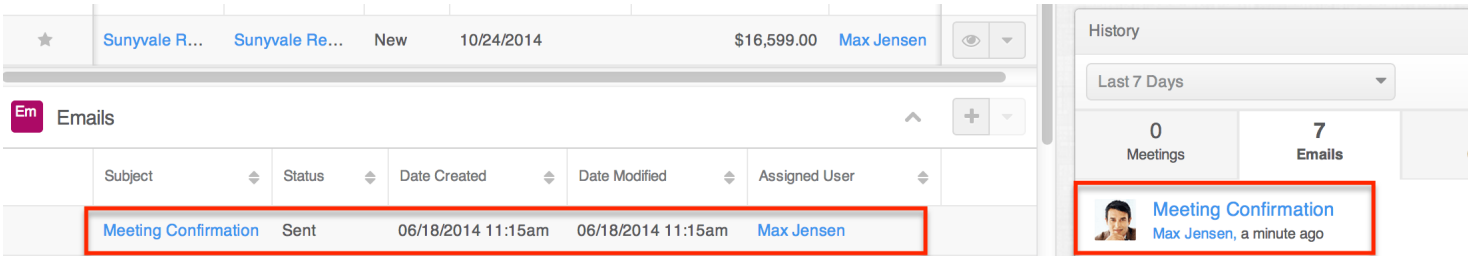
Use the following steps to compose and send an email from the Contacts list view:

1. Navigate to the Contacts list view by clicking the Contacts module tab.
2. Use the Module Search to find the Contacts records you wish to include on the email.
3. Select the desired contacts then choose "Email" from the Actions menu.




4. In the Compose Email window, enter in the subject and body of the email message, then click "Send".
    - Note: The email's To field will automatically populate with the name of the selected contact record(s).

Once the email is sent successfully, the email record will appear in the History dashlet and Emails subpanel of each contact record.




## Emailing Via Campaigns

Sugar's Campaign Logs module can be used to create email and newsletter campaigns to send mass emails to a relevant set of contacts. Email-type campaigns are mass emails sent to a target list while newsletter-type campaigns are a series of mass emails sent to a consistent or growing target list periodically or on a regular basis. For more information on sending mass emails to contacts via a campaign, please refer to the Campaigns documentation.

## Emailing Via Workflows

Sugar's Workflow module enables you to automate tasks, send email alerts, and execute various actions. With each workflow, a set of conditions trigger a

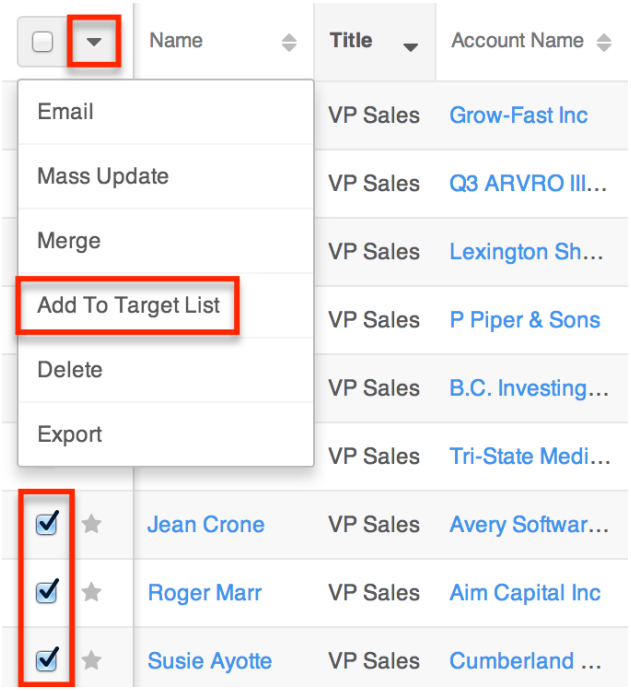
combination of actions and email alerts potentially including alerts to contact records. You also can create alert email templates used by workflows to insert relevant data to the automated email notifications. For more information on workflow email notifications, please refer to the Email Alert section of the Workflows documentation.

## Adding Contacts to a Target List

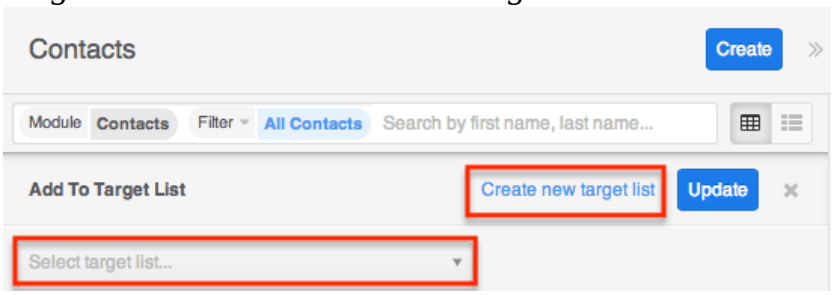
A target list consists of a group of individuals or organizations you wish to be included or excluded on a mass marketing campaign. These targets are typically identified based on a set of predetermined criteria such as being a prospect or existing customer, age group, industry, etc. There are various ways to add contacts to a target list in Sugar including using the Add to Target List option from the Contact list view's Actions menu. For more information on target lists and other methods of adding contacts, please refer to the Target Lists documentation. You can use the Select All feature in the list view when adding to a target list, which will allow you to easily select the first 1000 records in the result set. If you wish to add more than 1000 records or add a specific group of records to the target list, please use the filter option in module search to perform the additions in smaller batches.

The following steps cover adding contact records to a target list via the Contacts list view as an example:

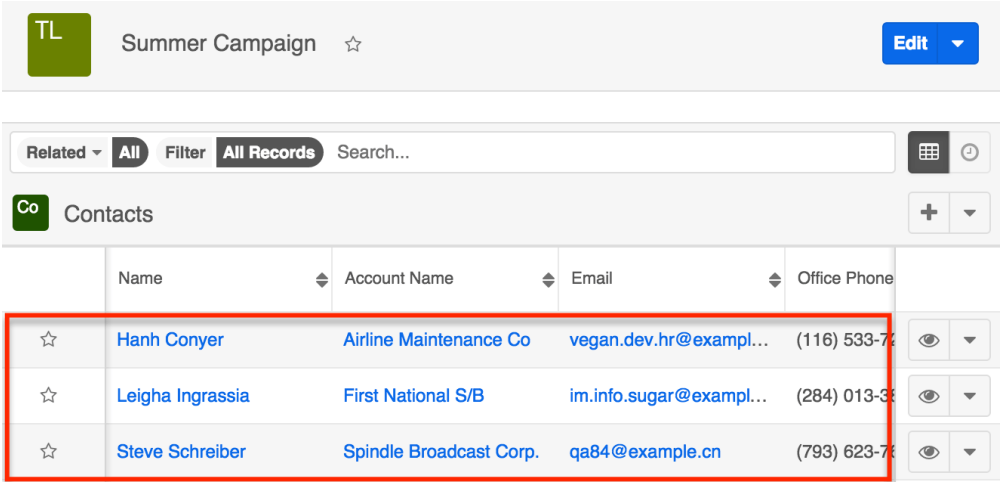
1. Navigate to the Contacts list view by clicking the Contacts module tab.
2. Use the Module Search to find the Contact records you wish to add to a target list.
3. Select the desired contact records individually or using the checkbox dropdown's options.
4. Choose "Add to Target List" from the Actions menu.




5. Locate and select the desired target list in the pop-up window or click "Create Target List" to add to a new target list.




6. In order to view the contacts that have been added, you can navigate to the Target Lists module. Click the target list's name to enter the record view, and you will see the contact records within the Contacts subpanel.

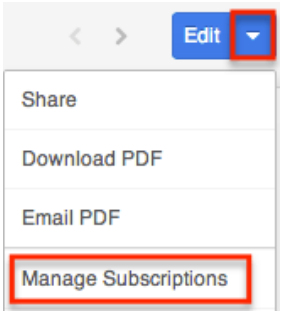



# Managing Contact Subscriptions

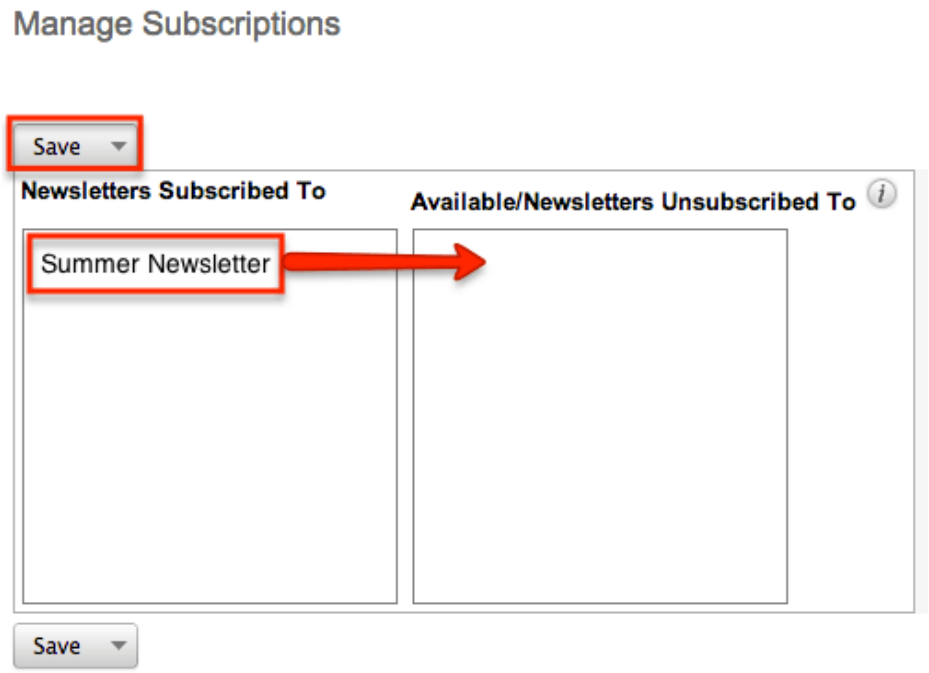
Contacts who receive newsletter-type campaign emails from your Sugar instance are considered subscribers to that newsletter. Users can manage these newsletter subscriptions from the Contacts record view using the Manage Subscriptions option in the Actions menu. Please note that you can only manage subscriptions for newsletter-type campaigns. A newsletter campaign you have created will have one or more default-type target lists. Contacts are added to these target lists in order to receive your newsletter. The Manage Subscriptions option allows you to add a contact to the default-type or suppression-type target lists of your newsletter campaigns without leaving the Contacts module. For more information on newsletter subscriptions, please refer to the Campaigns documentation.

Use the following steps to manage contact subscriptions via a contact's record view:

1. Navigate to a contact's record view.
2. Select "Manage Subscriptions" from the Actions menu.



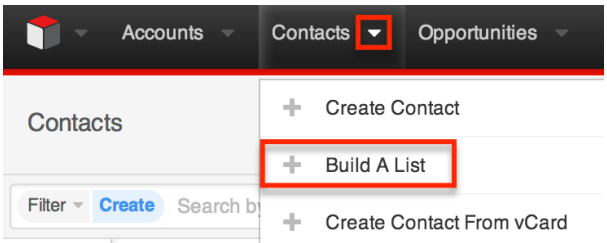

3. To add the contact to a newsletter subscription mailing list, select the newsletter from the Available/Newsletters Unsubscribed To list and drag it to the Newsletters Subscribed To list. This will add the contact to the campaign's default target list.
4. To remove the contact from the newsletter subscription mailing list, select the newsletter from the Newsletters Subscribed To list and drag it to the Available/Newsletters Unsubscribed To list. This will add them to the suppression-type unsubscription target list for the newsletter campaign which will prevent the contact from receiving the newsletter. Please note that the contact will not be removed from the campaign's default target list.




5. Click "Save" to preserve your changes.

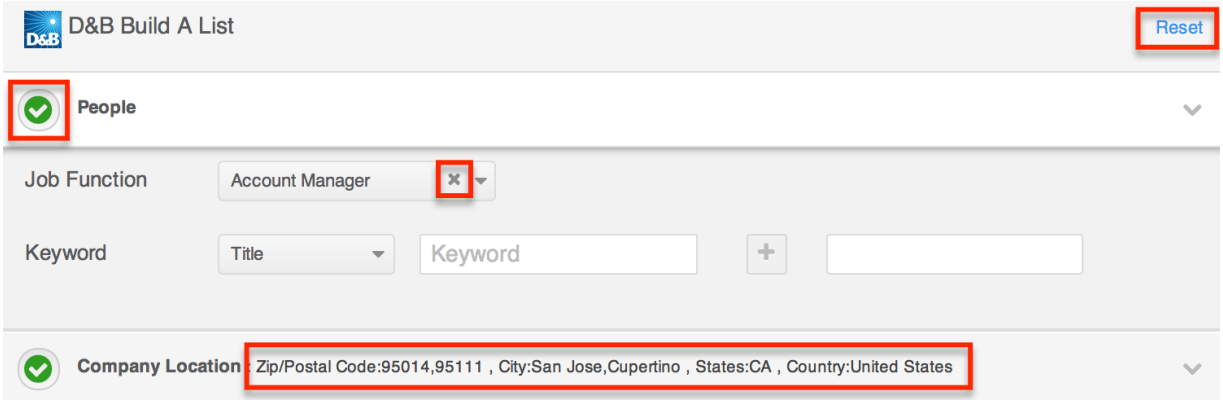
## D&B Build A List

D&B's Build A List option allows you to create a list of contacts for import based on various search filter criteria (e.g. people, company location, industry, etc.). The contacts meeting your search criteria will be pulled from the D&B database and displayed in the intelligence pane to the right of the page. You can easily import and save any of the contacts in the list to Sugar by selecting the contact's name. You can select the people-type module (Contacts, Leads, Targets) to which you wish to import the individual by selecting the Import As option on the upper right of the D&B: Contact Information dashlet. To build your list of contacts, simply click the triangle in the Contacts module tab and select "Build A List". Please note that administrators must configure the D&B connector via Admin > Connectors before users can utilize the Build A List page to create filters, view, and import data into Sugar. For more information on enabling connectors, please refer to the Enabling Connectors section of the System documentation in the Administration guide.

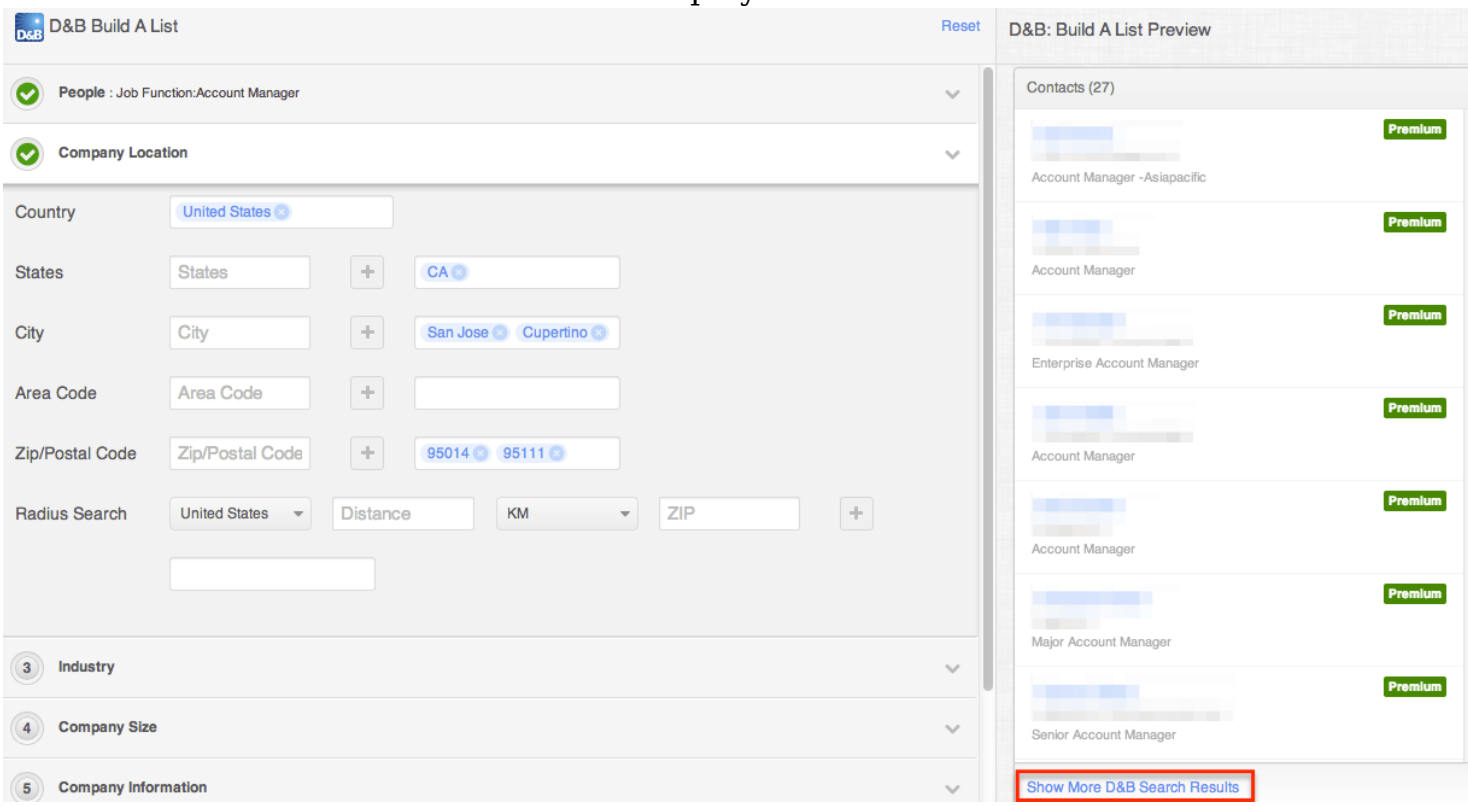



The D&B Build A List page will open displaying the various panels (e.g. People, Company Location, Industry, etc.) available to create your filter criteria. Once you

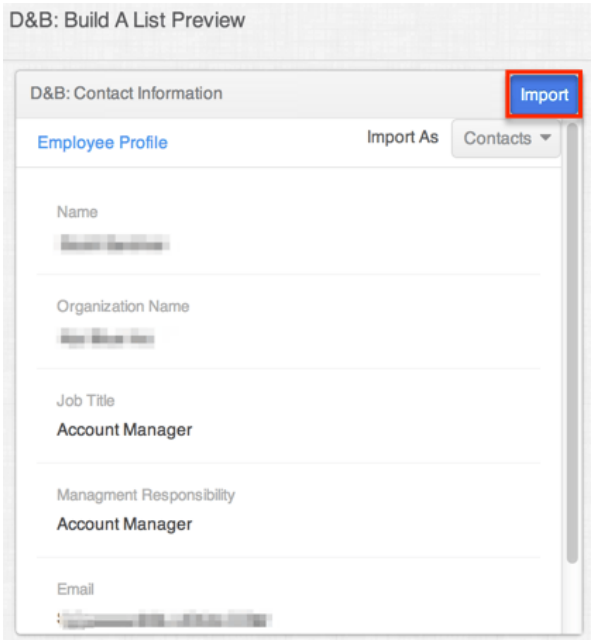
enter in at least one filter criteria in the corresponding panels, the panel will display a check mark to the left of the header. The panel you are currently viewing (e.g. People) will collapse as you open up a different panel (e.g. Company Location) on the page. Each collapsed panel will display a summary of filters (if applicable) created for the search. You can remove any unnecessary filter values by clicking the "x" to the right of the specific value or clicking "Reset" on the upper right of the page to clear all filters.




The D&B: Build A List Preview dashboard to the right of the page will display search results in real time as you enter in the various search filter criteria. Only contacts meeting all of the search criteria across all panels on the D&B Build A List page will be included in the search results. The first ten matching contacts will display in the Contacts dashlet, and you can click "Show More D&B Search Results" at the bottom of the dashlet to display the other contacts.



To import a contact, simply select the appropriate contact name in the Contacts dashlet and the contact's key information (e.g. name, title, etc.) will display in the D&B: Contact Information dashlet. To return back to the previous search results, simply click "Back To D&B Contacts List" at the bottom of the D&B: Contact Information dashlet. To import the contact data into Sugar, click the Import button on the upper right of the dashlet. The contact's data will appear in the corresponding Sugar fields in the contact's record view. In addition, the D&B Principal ID number associated to the contact in D&B will be populated automatically in the D&B Principal ID field of the contact's record view. The D&B Principal ID is used to identify the contact and detect duplicate records, so any record(s) in the dashlet detected as a duplicate of an existing record in Sugar will display "Duplicate" to the right of the contact's name. Sugar will also display any duplicate record(s) detected based on the D&B Principal ID when attempting to save the contact.

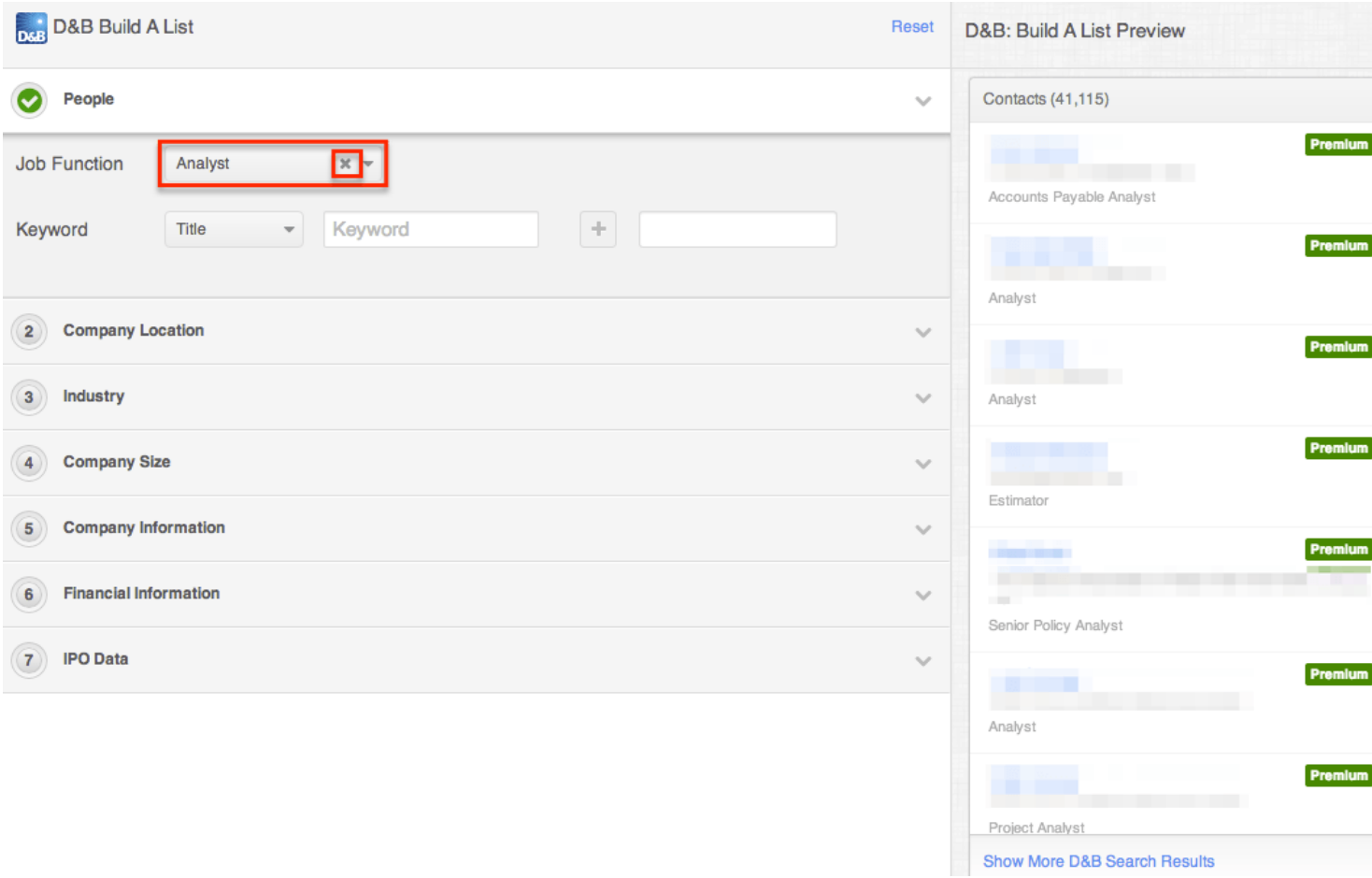



Please note that if the selected contact is detected as a duplicate of an existing Sugar contact, the duplicate record(s) will appear within the record view upon save, but you can click "Ignore Duplicate and Save" if you wish to proceed with creating the record. You can also choose to view and edit the duplicate record's details by clicking "Select and edit" in the panel. Please note that each contact will need to be imported one-at-a-time. Once the contact is imported to Sugar, you will be taken back to the Build A List page where your search filter criteria are still preserved and you can select other contacts to import from the results list.

## People Filter Panel

By default, the People panel is open at the top of the page, and you can select a specific job function as well as enter a keyword based on the contact's title, biography, or both to pull up a matching list based on these criteria. As you select

a job function or enter in a keyword, the list of contacts meeting the criteria will start displaying in the Contacts dashlet. You can remove any unnecessary filter values by clicking the "x" to the right of the value(s). The D&B: Build A List Preview dashboard will display the search results in real time as you enter in your search criteria.



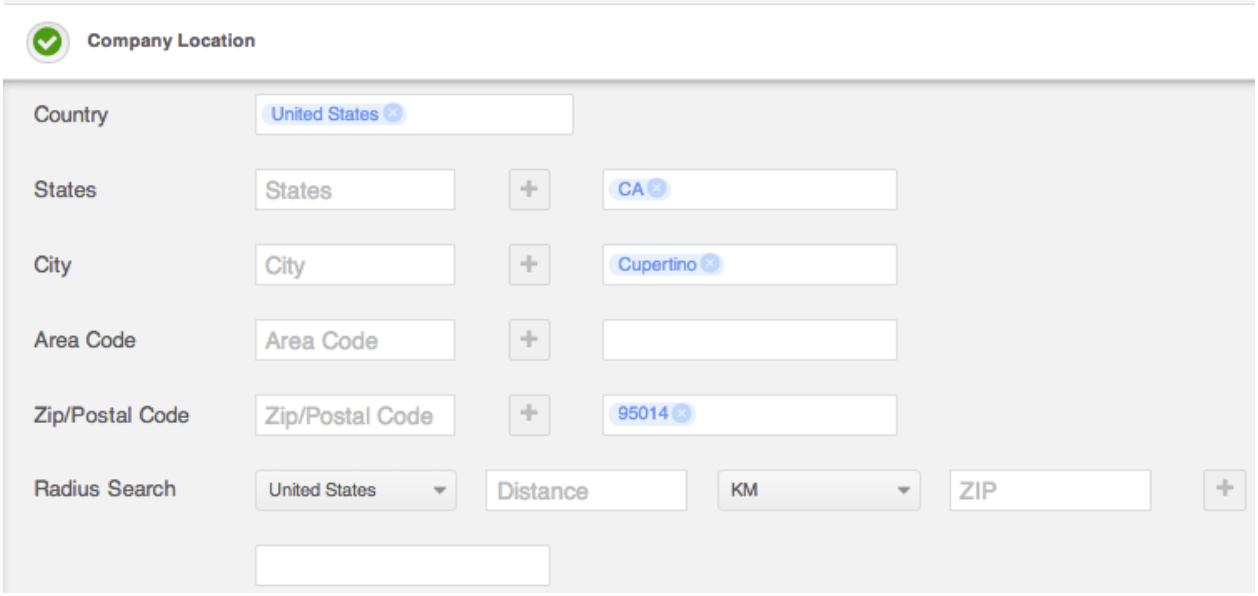

## Company Location Filter Panel

The Company Location panel allows you to enter search filters specific to a company's location (e.g. country, state, city, area code, etc.) in order to pull up contacts related to the company meeting the criteria. When creating the filter, you can either select a value from the dropdown list (e.g. Country) or enter in a value in the open text box (e.g. City) to add the filter to your search. For example, you can select a country from the dropdown list by clicking in the open text box or begin typing a keyword then select the matching value in the list. You can add more than one value to this field by clicking in the box again to pull up the dropdown list or entering a value then selecting from the list.

When entering a value for the City field, you must click the Plus icon to the right of the open text box in order to have the filter applied to your search. You also have the option to add multiple values to the same filter criteria by entering the new

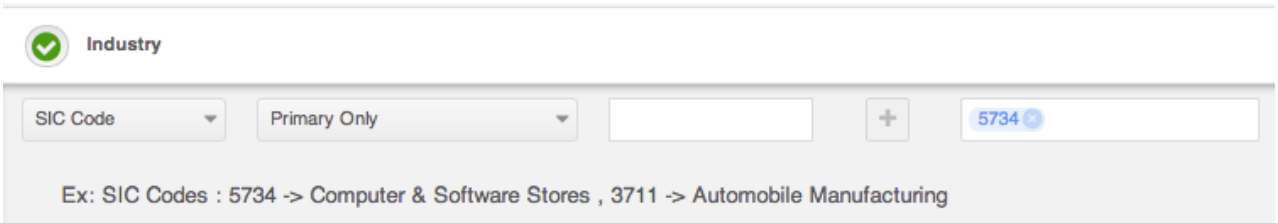
value and clicking the Plus icon to add it to the list. You can also define a Radius Search criteria for either United States or Canada based on a specific distance from a certain zip code.

If you have the specific list of contacts you wish to import into Sugar based on the related company's location, you can simply select the appropriate contact (e.g. John Smith) in the search results list and their key information (e.g. name, job title, email, etc.) will display in the D&B: Contact Information dashlet. Please note that each contact will need to be imported one-at-a-time. If you wish to apply additional filter criteria, please proceed to the other panels on the page.



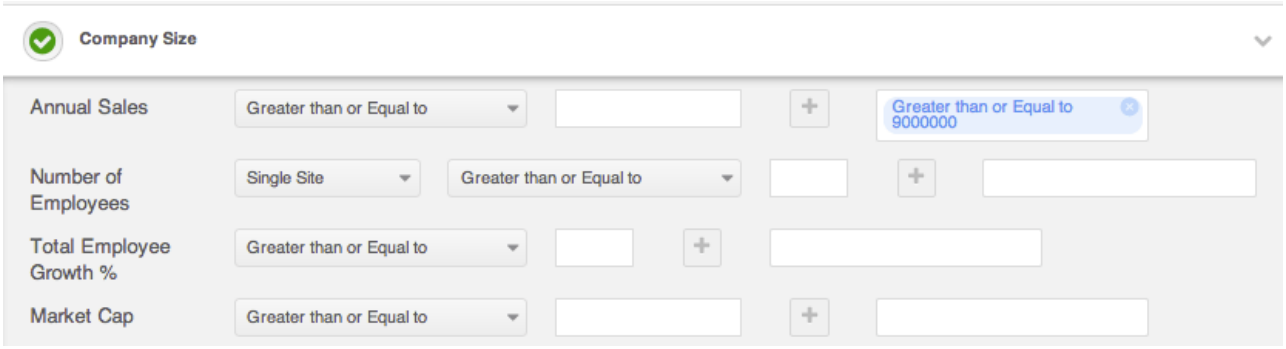

## Industry Filter Panel

The Industry panel allows you to create a filter based on the NAICS Code or SIC Code of the company. You can select either "Primary Only" or "Primary and Secondary" as the corresponding condition from the dropdown list to the right. In the open text box, enter the appropriate SIC or NAICS code. Once you enter in the appropriate code (e.g. 5734), click the Plus icon to apply this specific code to your D&B search. The D&B: Build A List Preview dashboard will re-build the results list to display the contacts related to the companies meeting all of the filter criteria entered on the page.



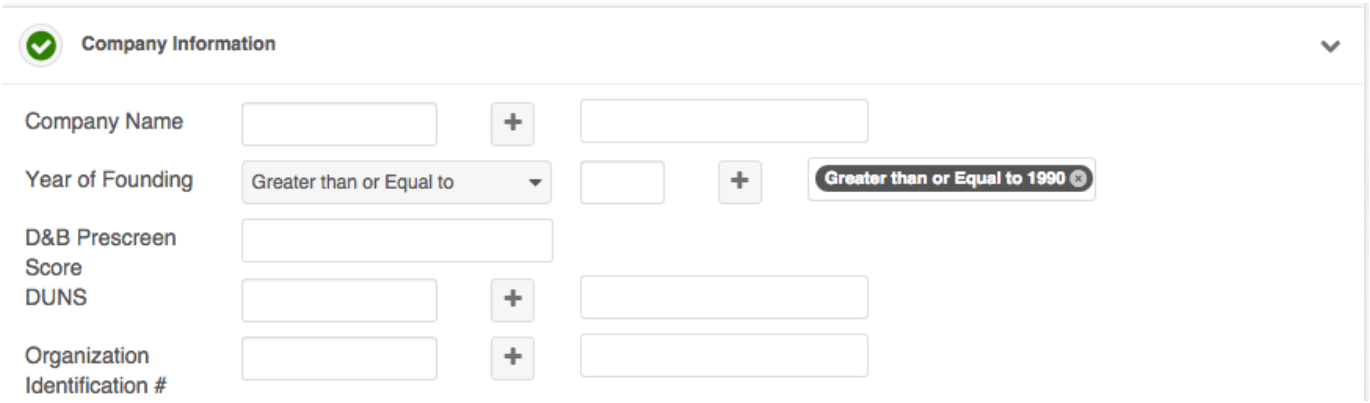
## Company Size Filter Panel

The Company Size panel provides filter options for annual sales, number of employees, total employee growth percentage, and market cap. You have the ability to enter a range for values by selecting the Between option from the condition's dropdown list. The other conditions available to select are "Greater than or Equal to" and "Lesser than or Equal to". Click the Plus icon to add the values to the filter list to be applied to your Build A List search.



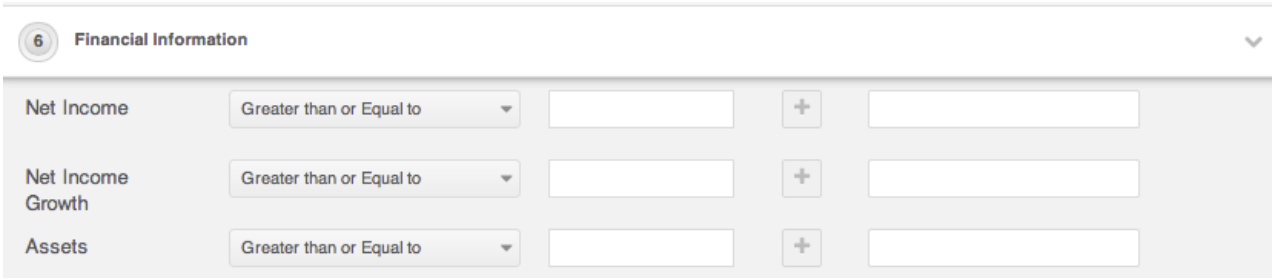

## Company Information Filter Panel

The Company Information panel enables you to filter based on the company's name, year of founding, D&B prescreen score, DUNS number, and organization identification number. To filter your search based on company name, simply enter in the keyword then click the Plus icon to add the filter criteria. You can choose to enter a range for the year of founding by selecting the Between condition. You can also filter based on the organization's associated credit risk level by selecting "Low", "Medium", or "High" in the D&B Prescreen Score field. The specific 9-digit DUNS number for the company(s) can be entered in the DUNS field if you have that information. For more information regarding the DUNS number, please refer to the D&B Dashlets section of the Intelligence Pane documentation. If you have a specific organization identification number you wish to filter the search by, you can enter that value as well. The contacts related to the companies meeting all of the filter criteria will display in the intelligence page.



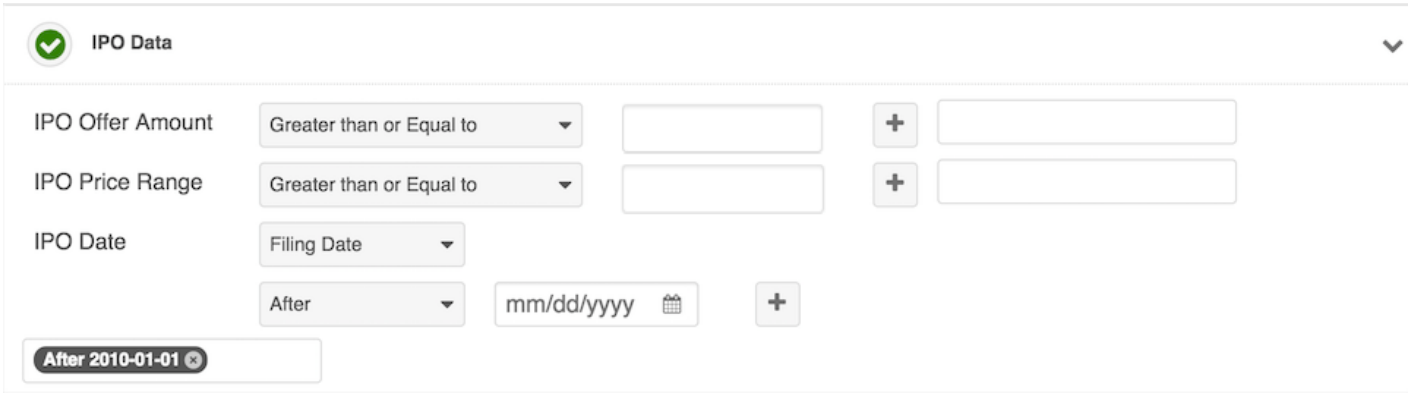

## Financial Information Filter Panel

The Financial Information panel allows you to narrow your search further by specifying the company's net income, net income growth, or asset values you wish to include in the filter. The conditions available to choose are "Greater than or Equal to", "Lesser than or Equal to", and "Between".




## IPO Data Filter Panel

The IPO Data panel includes the IPO Offer Amount and IPO Price Range filter options where you can enter the appropriate offering amount or price range of each share offered for the company. The conditions available to choose are "Greater than or Equal to", "Between", etc. In addition, you can filter based on the IPO date (Filing Date, Trading Date) by selecting the condition (e.g. After), choosing the date, then clicking the Plus icon.




Last Modified: 12/21/2015 06:05pm

# Accounts

## Overview

Sugar's Accounts module consists of companies with whom your organization has a relationship and is generally seen as the hub for managing and analyzing your business' interactions with each customer. There are various ways you can create accounts in Sugar such as via the Accounts module, duplication, importing accounts, etc. Once the account record is created, you can view and edit information pertaining to the account via the Accounts record view. Each account record may then relate to other Sugar records such as contacts, meetings, cases, opportunities, and many others as the customer's relationship matures. This documentation will cover how to use the Accounts module, as well as the various actions and options available from within the module.

## Account Fields

The Accounts module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

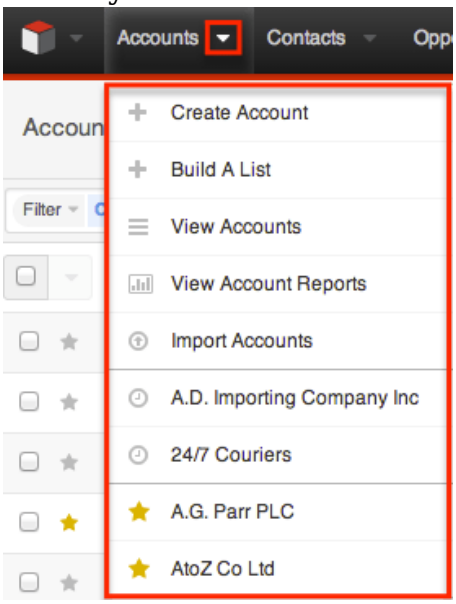
| Field | Description |
|---|---|
| Alternate Phone | The account's alternate phone |
| Annual Revenue | The company's annual revenue |
| | |

| | |
|---|---|
| Assigned To | The Sugar user assigned to the account |
| Billing Address | The account's billing address |
| Campaign | The campaign, if any, from which the account originated |
| Copy Address From Left | Select the box to copy the account's billing address to the shipping address field |
| Date Created | The date the account record was created |
| Date Modified | The date the account record was last modified |
| Description | A description or other information about the account |
| Email Address | The account's email address |
| Employees | The number of employees at the company |
| Facebook Account | The account's Facebook account information |
| Fax | The account's fax number |
| Google Plus ID | The account's Google Plus ID |
| Industry | The industry type to which the company belongs |
| Name | When viewing, the account's name |
| Office Phone | The account's office number |
| Ownership | Indicate if the company is privately or publicly owned |
| Member Of | Designate a parent-child relationship between the account and another account in Sugar |
| Rating | The rating for the company compared to other companies in Sugar |
| Shipping Address | The account's shipping address |
| SIC Code | The Standard Industrial Classification (SIC) code for the account |
| Teams | The Sugar team(s) assigned to the account record |
| Ticker Symbol | The stock trading symbol for the company |

| | |
|---|---|
| Twitter Account | The account's Twitter account information |
| Type | The account type (e.g. customer, investor, etc.) |
| Website | The website URL associated with the account |

## Accounts Module Tab

The Accounts module tab is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access the Accounts list view. You may also click the triangle in the Accounts tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of accounts you last viewed in the module. The Favorites menu displays the list of accounts you most recently marked as favorites in the module.




The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|---|---|
| Create Account | Opens the record view layout to create a new account |
| Build A List | Opens the D&B Build A List Page to create a list of companies for import based on various search filter criteria<br><br>Note: D&B connector must be enabled |

| | |
|---|---|
| | via Admin > Connectors in order to utilize the Build A List page. |
| View Accounts | Opens the list view layout to search and display accounts |
| View Account Reports | Displays existing reports based on the Accounts module |
| Import Accounts | Opens the import wizard to create or update accounts using external data |

If you do not see the Accounts module tab in Sugar, please check the following:

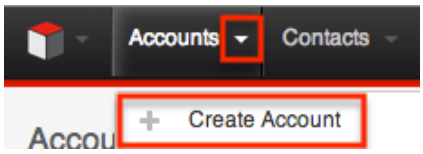
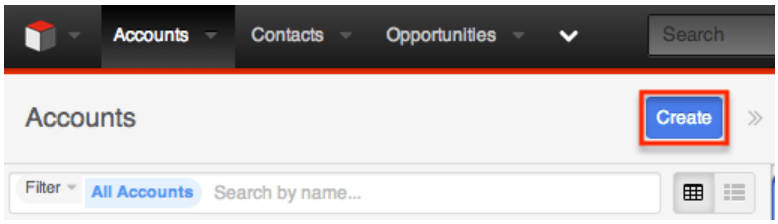
- The Accounts module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Accounts module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Accounts module for your entire Sugar instance. Reach out to your Sugar administrator to have the Accounts module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

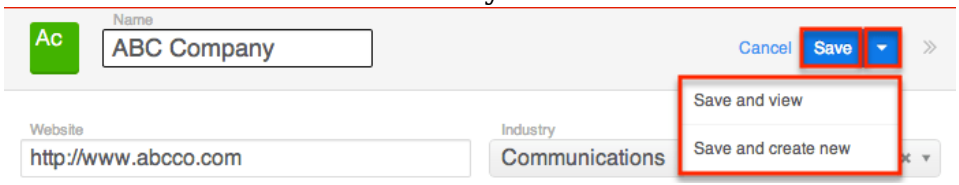
## Creating Accounts

There are various methods for creating accounts in Sugar including via the Accounts module, quick-create, duplication, and import. The same record view layout opens when creating the account directly from the Accounts menu as well as via the Quick Create menu and includes all of the relevant fields for your organization. Please note that administrators can configure the Record View layout via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

### Creating Via Accounts Module

One of the most common methods of account creation is via the Accounts module using the Create Account option in the module tab or the Create button on the list view. This opens the record view layout which allows you to enter all of the relevant information for the account.
Use the following steps to create an account via the Accounts module:

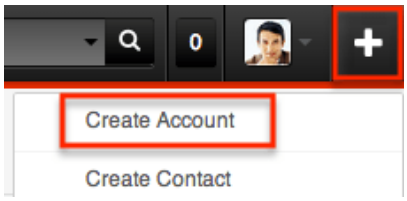
1. Click the triangle in the Accounts module tab to open the actions menu and select "Create Account". You can also click the Create button on the upper right of the Accounts list view.
   From Accounts module tab:
   
   
   From Accounts list view:
   
   
2. Enter appropriate values for the fields in the record view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".
   - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.

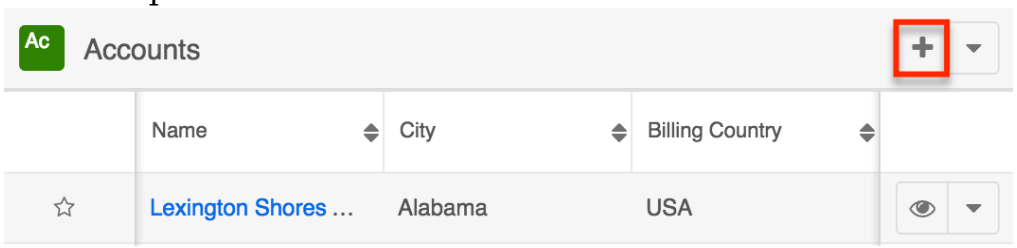
## Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of any Sugar page to access the menu. You can also quick create an account from any Accounts subpanel on related module records.
Use the following steps to create an account via Quick Create:

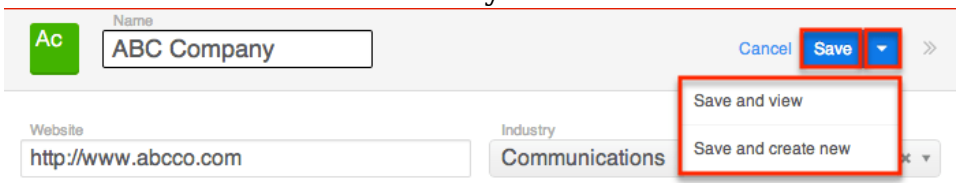
1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Account" or click the Plus button on any Accounts subpanel on a related module's record view.
   From Quick Create menu:




From subpanel:




2. Enter appropriate values in the fields in the record view form. All required fields will indicate "Required" in the field and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".
    - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.

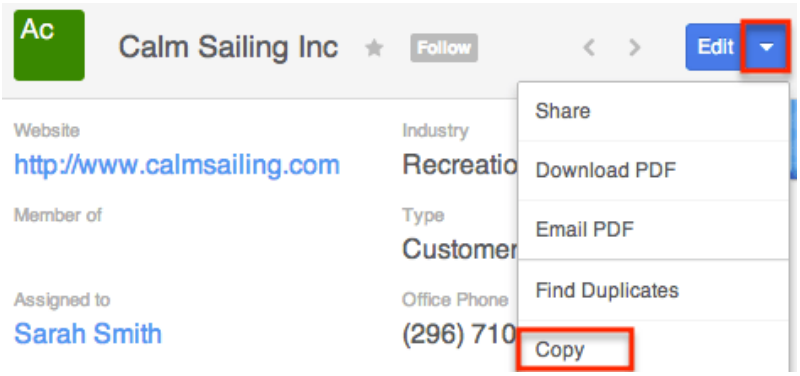



## Creating Via Duplication

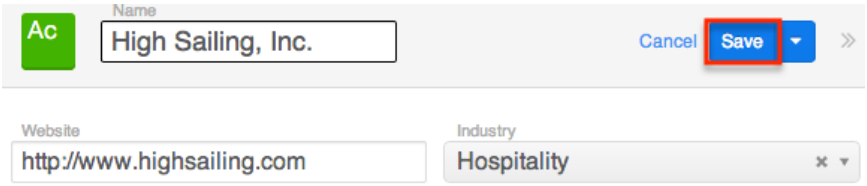
You can also create a new account by duplicating an existing account record. The Copy option is useful if the account you are creating has similar information to an existing account. Please note that existing subpanel relationships for the original account record will not carry over to the duplicated account record.

Use the following steps to create an account by duplicating an existing record:

1. Navigate to an account's record view.
2. Click the Actions menu and select "Copy".




3. The displayed record view is pre-populated with the original account's values. Update the necessary fields, then click "Save".
    - Please note that you can also click the Actions Menu to the right of the Save button to select the "Save and view" or "Save and create new" options. Save and view will display the record's details after the save is complete. The Save and create new option saves the current record and opens a new, blank record view in edit mode where the user can create another record.

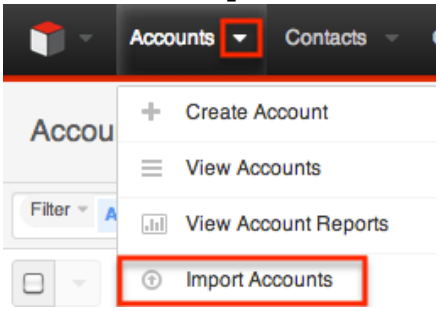



## Importing Accounts

The import function allows you to push multiple account records into Sugar using a comma (or other character) delimited file instead of creating them one-by-one. For more information on importing, please refer to the Import documentation.

Use the following steps to import accounts via the Import Accounts option:

1. Click the the triangle to access the Actions menu in the Accounts module tab and select "Import Accounts".




2. In Step 1, select the import file and choose "Create new records only". Click "Next".
3. In Step 2, confirm the import file properties. Click "Next".

4. In Step 3, confirm the field mappings for the import. Click "Next".
5. In Step 5, view the import results.
    - The Created Records tab will show all of the new account records.
    - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
    - The Errors tab will show records that were not imported due to errors detected during import.

## Viewing Accounts

There are various options available for viewing account records in Sugar including via Accounts list view, Accounts record view, Accounts Recently Viewed menu, dashlets, and reports. Please note that you will only be able to see account records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

### Viewing Via List View

The Accounts list view displays all account records meeting the current search criteria. Users can also access the activity stream to view posts specific to the account record. For more information on the Record View's Activity Stream, please refer to the Activity Stream section of this documentation. The Intelligence pane can also be viewed to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's sales, cases, activities, etc. For more information regarding the Record View's Intelligence Pane, please refer to the Intelligence Pane section of this documentation.To access the list view, simply click the Accounts module tab. While list view shows key account fields, you can click the account's name to open the record view. For more information on viewing accounts via list view, please refer to the Accounts List View section of this documentation.

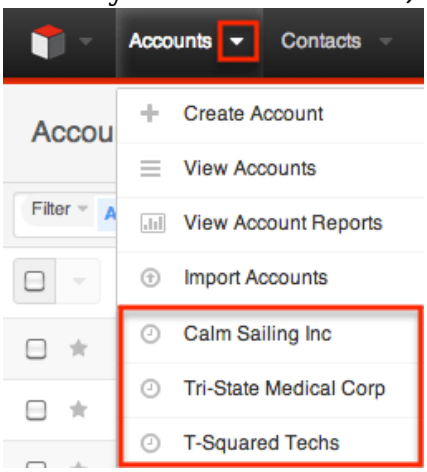
### Viewing Via Record View

The Accounts record view displays thorough account information including all relevant account fields followed by subpanels of the account's related records belonging to various modules. Users can also access the activity stream to view posts specific to the account record. For more information on the Record View's Activity Stream, please refer to the Activity Stream section of this documentation. The Intelligence pane can also be viewed to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's sales, cases, activities, etc. For more information regarding the Record

View's Intelligence Pane, please refer to the Intelligence Pane section of this documentation. The record view can be reached by clicking an account record's link from anywhere in the application including from the Accounts list view. For more information on viewing accounts via the record view, please refer to the Accounts Record View section of this documentation.

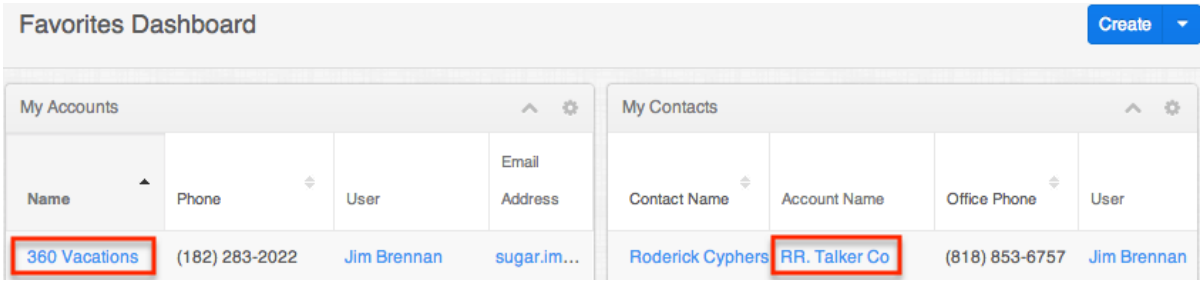
## Viewing Via Recently Viewed

As you work, Sugar will keep track of which accounts you have recently viewed. Click the Actions menu in the Accounts module tab to see a list of your most recently viewed accounts, and click each name to open the Accounts record view.



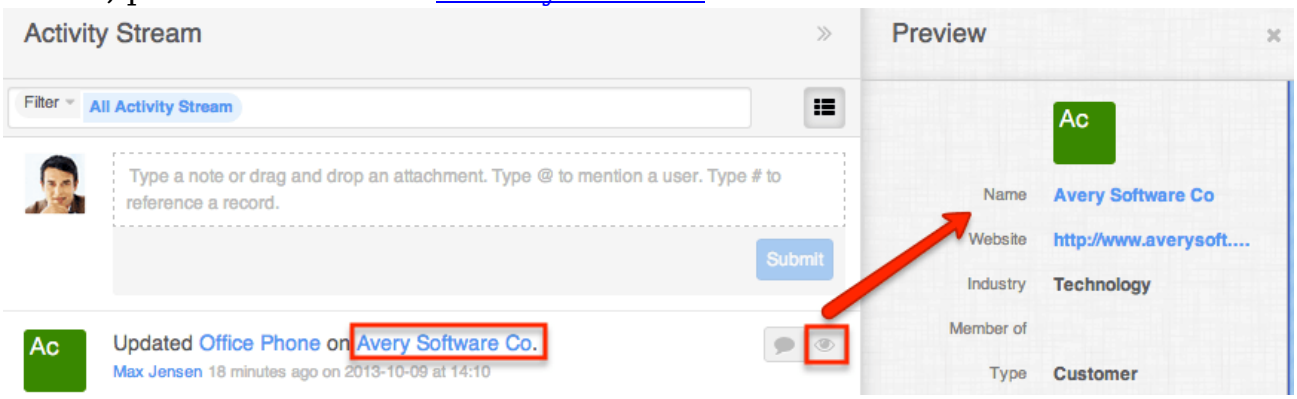

## Viewing Via Dashlets

Sugar Dashlets allow users to get a quick view of various records, activities, reports, etc. Dashlets may be added to a user's Home page or to the intelligence pane of any module. You can view account information in List View dashlets specific to the Accounts module (e.g. My Accounts dashlet), as well as List View dashlets based on other modules such as "My Contacts". Clicking an account's name from any dashlet will open the Accounts record view. For more information on using dashlets and viewing account records via dashlets, please refer to the Intelligence Pane documentation.



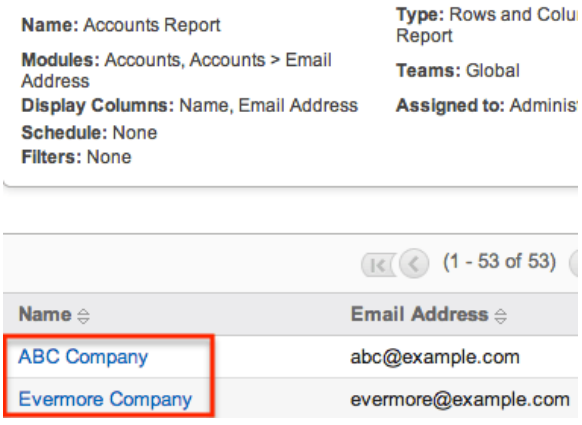
## Viewing Via Activity Streams

The activity stream allows users to view each other's activities in Sugar and the actions that took place for the various modules (e.g. Accounts, etc.) via posts (record post, user post, etc). You can access the Accounts record view by clicking the account's name referenced in the post. You can also preview the account record's detail directly from the activity stream by clicking the Preview button to the right of the post. For more information on viewing records via the activity stream, please refer to the Activity Streams documentation.



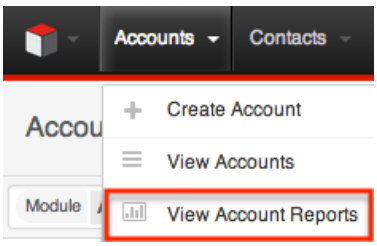

## Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding accounts and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the accounts record view by clicking the account's name in the report results. Please note that you can only directly access record views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation.




In addition to navigating to the Reports module and finding or building relevant

reports, you can use the Account module tab's View Account Reports option to see all account-based reports to which you have access.




Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

## Searching Accounts

The Accounts list view includes a module search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Accounts list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.

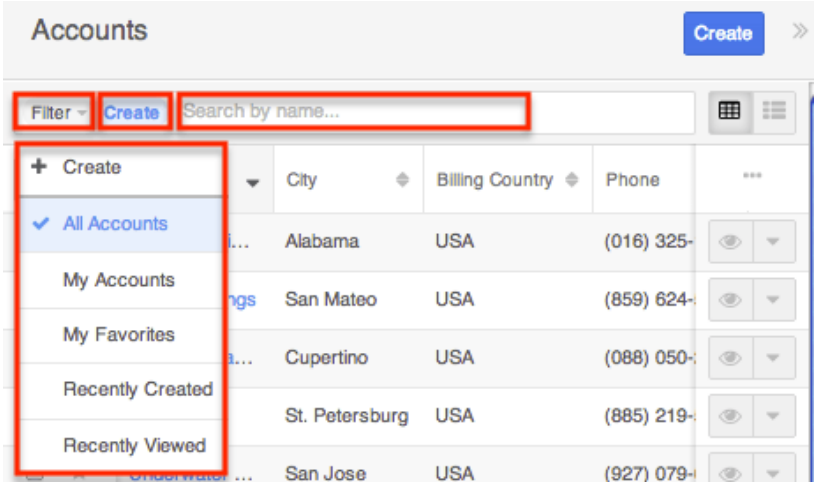
For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

### Module Search

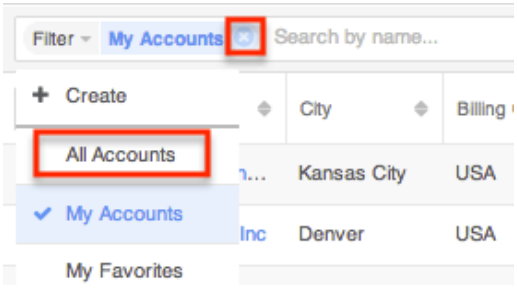
Module search enables users to easily search by account name within the Accounts module and pull up matching records in the list view. The search also provides a Filter option which can be used in combination with the open Search box to narrow your search further using the available options as follows:

- Create : Create a new custom filter which you can use to filter your search
  - Note: You can also click "Create" to the right of the Filter option.

- All Accounts : Returns all records in the module to which you have access
- My Accounts : Returns only records assigned to you
- My Favorites : Returns only records you have marked as favorites
- Recently Created : Returns only records you created in the module within the last 7 days
- Recently Viewed : Returns only records you have viewed in the module within the last 7 days




When you choose a filter, Sugar will return accounts which match both the selected filter and any name provided in the "Search by name..." bar in the filtered list view results. For example, if you select "My Accounts" in the Filter options and enter an account name, Sugar will only return account records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search bar. To see all account records to which you have access, simply select the All Accounts option in the filter and remove any text from the search bar. You can also click the Clear icon within the selected filter option (e.g. My Accounts) in the Search bar to clear the filter and pull up all list view search results. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the "Search by name..." bar only are not preserved when navigating away.




Please note that you will only be able to see account records as allowed by your

team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Administrators can configure what fields appear on the Accounts Module Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

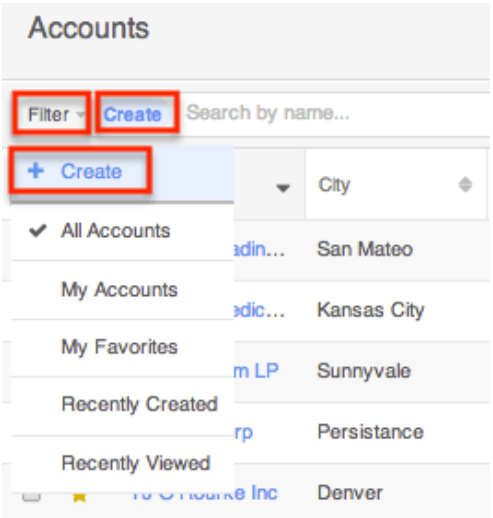
## Creating a Filter

Users can also create new filters via the Create option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the Accounts list view. You have the option to add multiple fields to your new filter by clicking the Plus button to the right of the filter selection dropdown lists and set select operators along with their value(s). A filter's criteria need to be true for a record in order for it to appear in the list view search result. Additionally, filters with no specified values may be saved as a custom filter to act as a filter template when a user often searches using the same fields but with varying values. Please note that only fields you have view access for will appear in the Filter list when creating a search filter.

When you run a search using a created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.

The following steps cover creating a new Assigned to filter as an example:

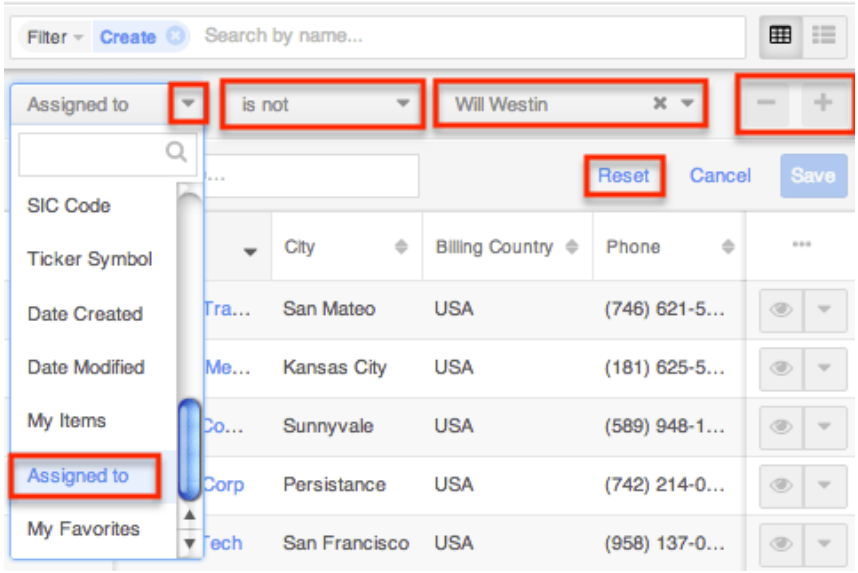
1. Click the Filter option on the Accounts search bar then select "Create".
    - You can also click "Create" to the right of the Filter option.




2. Select the field you wish to add to your filter as well as the condition and matching criteria.

- Note: Only fields you have view access for will be available to add in the Filter list.

3. To add additional fields to the new filter, click the Plus button to the right of the filter.
   - To remove fields from the new filter, click the Minus button to the right of the filter.
   - To clear any filter values (e.g. Will Westin), simply click the "x" to the right of the value or select "Reset" to the left of the Save button.



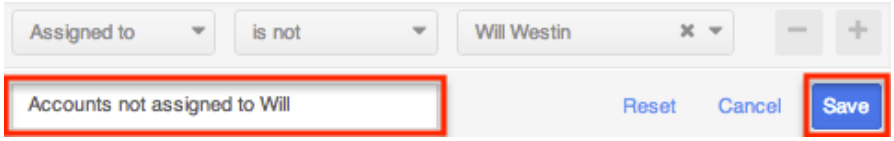

The list view will automatically display results matching your filters as you create and modify the criteria.

### Saving a Filter

Saving a filter will preserve the chosen fields as well as the condition(s) of the matching value(s). Additionally, it will allow users to easily select previously created and saved filters from the Filter options.

The following steps cover saving a new search by Name filter as an example:

1. Create a new filter to perform a search on your desired fields.
2. Enter in a name for the new filter (e.g. "Accounts not assigned to Will").




3. Click "Save" to add this filter to the module's Filter options.

## Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search is used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.




To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

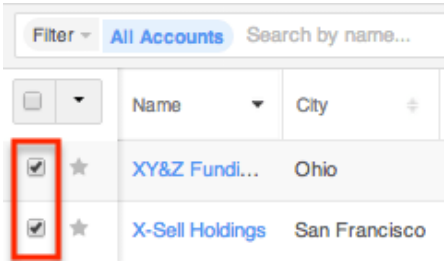
## Accounts List View

The Accounts list view displays all account records meeting the current search criteria to which your user has access. You can view the basic details of each account within the field columns. Please note that you will only be able to see account records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

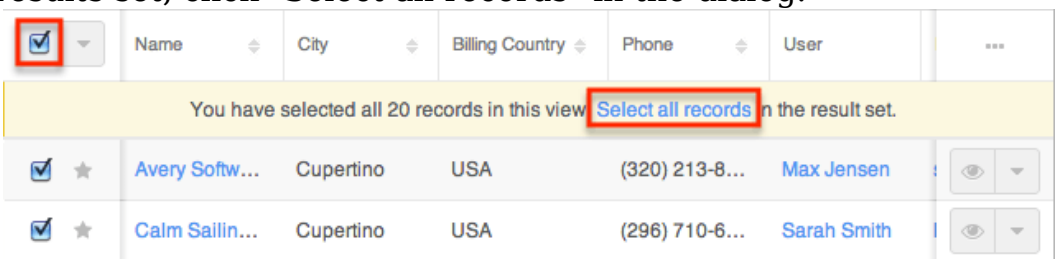
Users with administrator or developer access have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

### Checkbox Selection

You can perform several actions on account records directly from the list view by first selecting the desired records. To select individual account records on the Accounts list view, mark the checkbox on the left of each row.




To select all account records displayed on the current set of list view results, click the checkbox to the left of the Actions menu. A dialog will appear below the list view column headers indicating that you have selected all records on the list view's current results set (e.g. 20). To select all records matching the current search results set, click "Select all records" in the dialog.

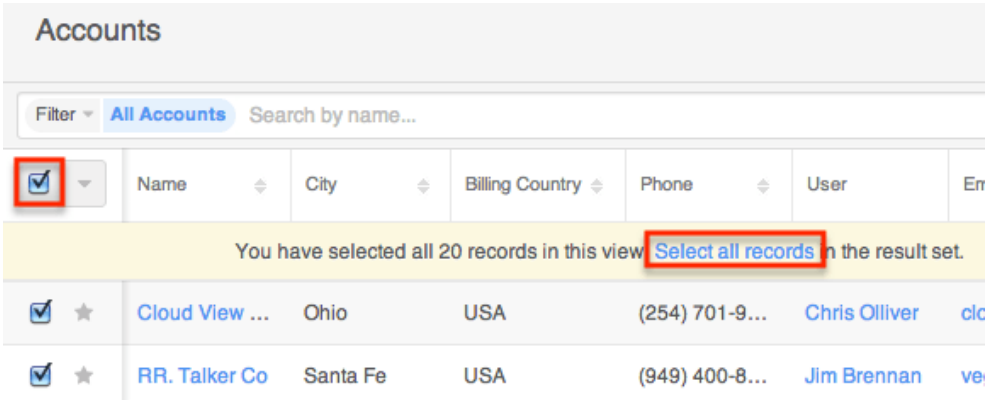



If you wish to clear the selection for all records on the list view result set, simply click "Clear selections" in the dialog. You can also clear the selections for all records by clicking the checkbox option again to remove the check marks.

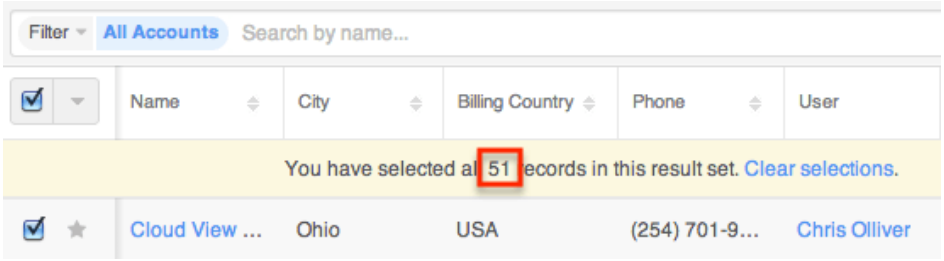



## Total Record Count

You can view the total record count on the Accounts list view by selecting all records displayed on the current set of list view results. Once the records are selected, a dialog will appear allowing you to select all records in the results set.

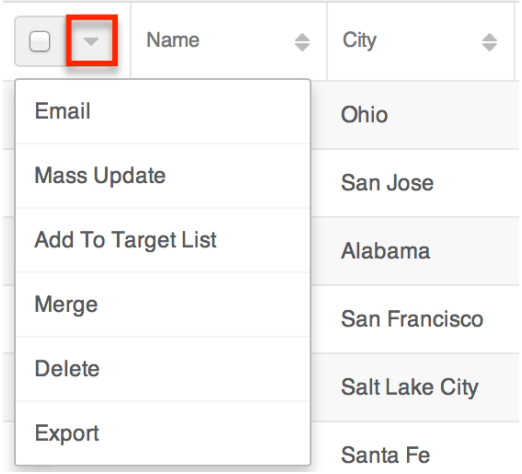



The total count of all records on the list view result set will appear in the dialog.




## Mass Actions Menu

The Mass Actions menu to the right of the checkbox option allows you to perform various actions on the currently selected records.



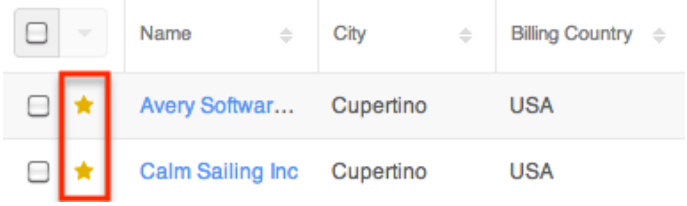

The options in the Mass Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Email | Email one or more accounts at a time |
| Mass Update | Mass update one or more accounts at a |

| | |
|---|---|
| | time |
| Add to Target List | Add one or more accounts to a target list |
| Merge | Merge two or more duplicate accounts |
| Delete | Delete one or more accounts at a time |
| Export | Export one or more accounts to a CSV file |
| Recalculate Values | (Available in certain circumstances) Updates calculated values to reflect changes to calculated fields made in Studio |

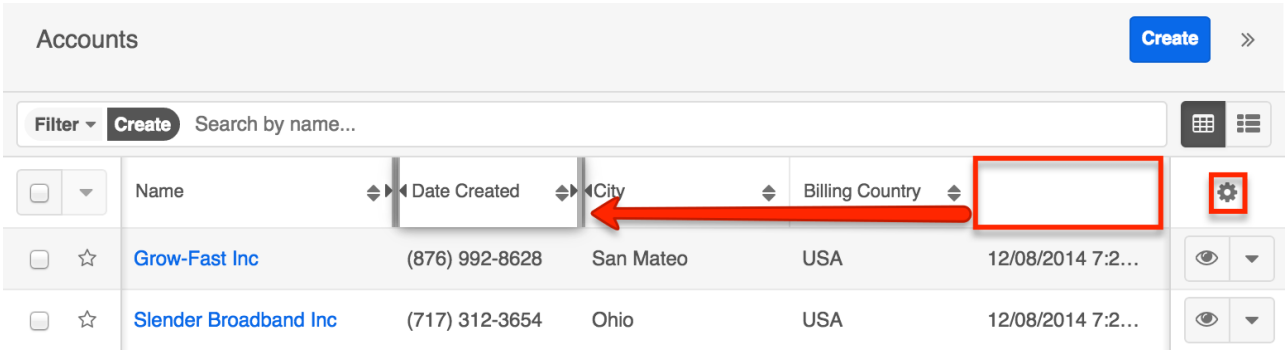
## Favorite Designation

Users have the option to mark account records as favorites via the list view as well as the record view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the Accounts module tab. In the Accounts list view, the star on the left of each account's row is orange once marked to indicate a favorite account. For more information on how to mark records as favorites, please refer to the Favoriting Accounts section of this documentation.



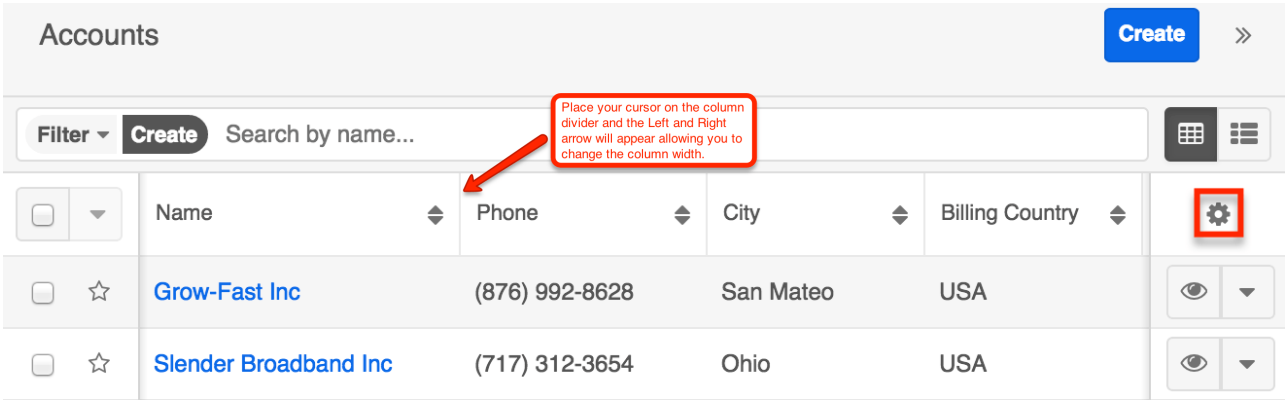

## Column Reordering

List view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the default column order.




## Column Resizing

Users can easily adjust the size of columns in the Accounts list view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the current list view is different from the default column width. Changes to the column width made by administrators in Studio are only respected if the user has not resized the specific column in the list view. The column size set by the user will supersede the default column width configured in Studio until the user resets the list view back to the default widths.

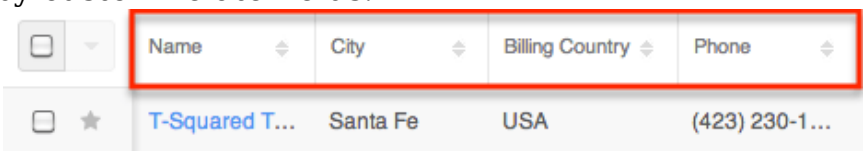



## Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting

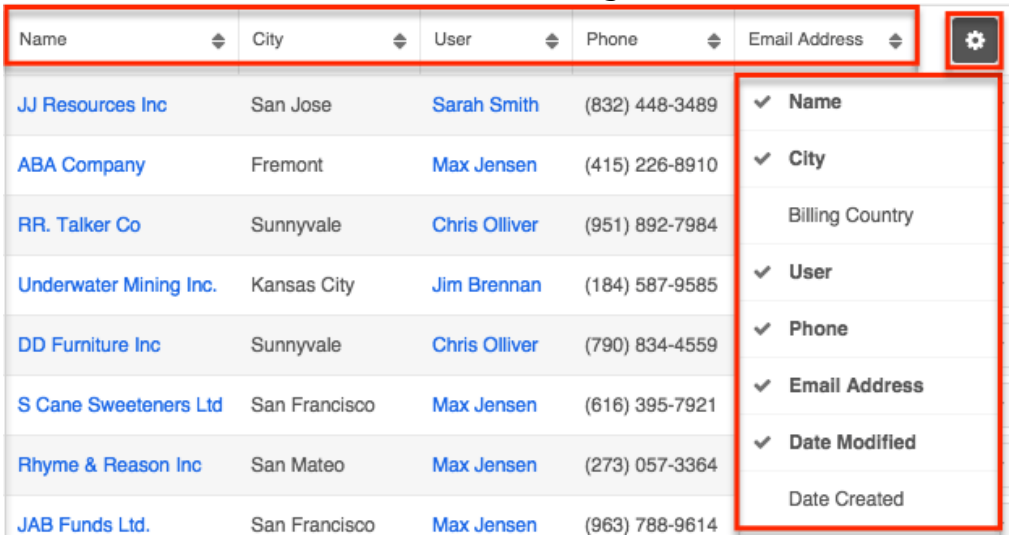
will have a pair of arrows.

Note: List views may only be sorted by one column at a time and cannot be sorted by custom relate fields.




## Column Selection

Sugar gives users the ability to personalize the list view by specifying which fields they want to be displayed in the list view. You can click the Column Selection icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column on your list view. Please note that administrators have the ability to configure what fields are available to display in the list view via Admin > Studio. For more information on configuring fields to display in the list view, please refer to the Studio documentation in the Administration guide.

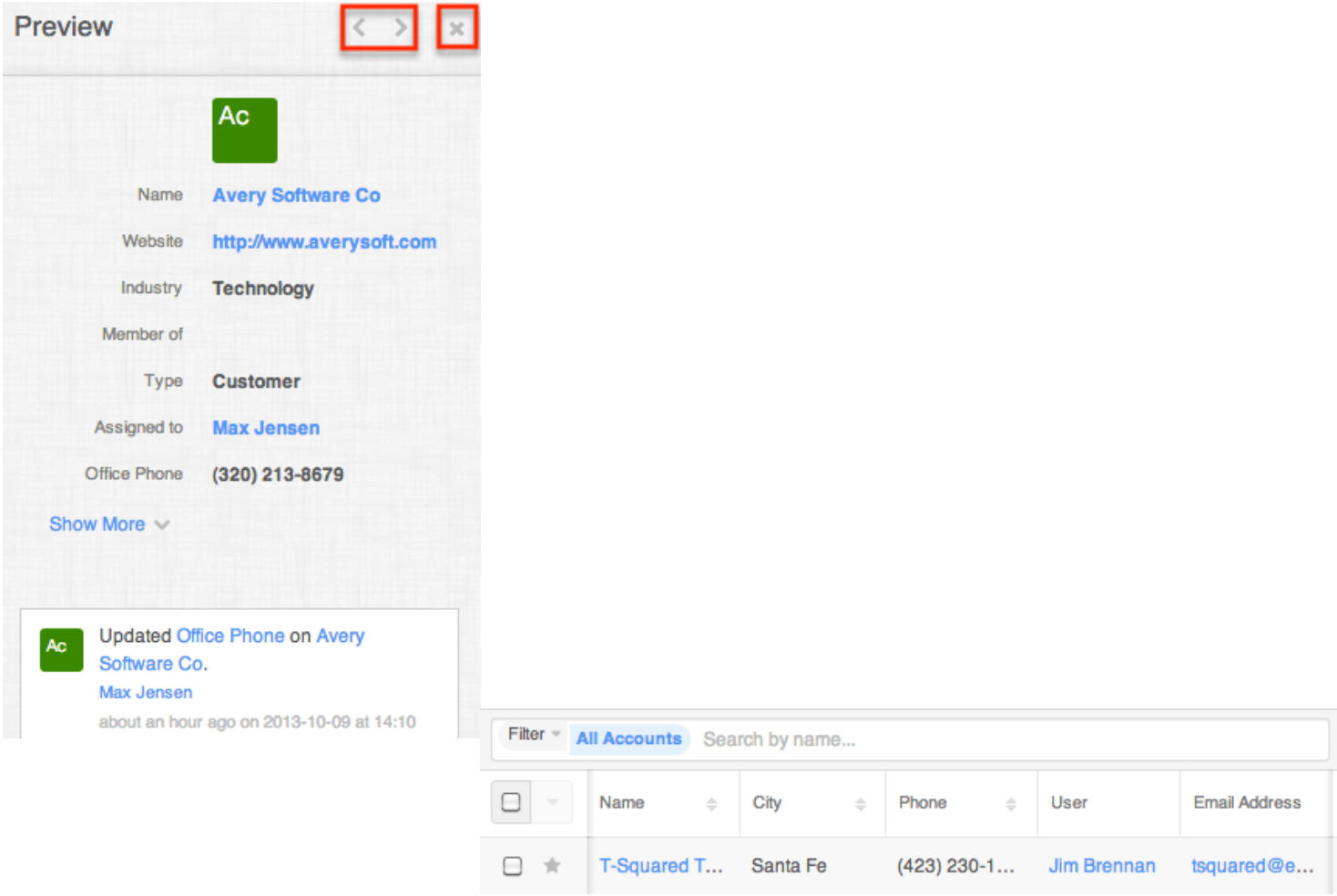



## Preview

Users can view a record's details directly from the Accounts list view by clicking the Preview icon to the far right of each account's row.

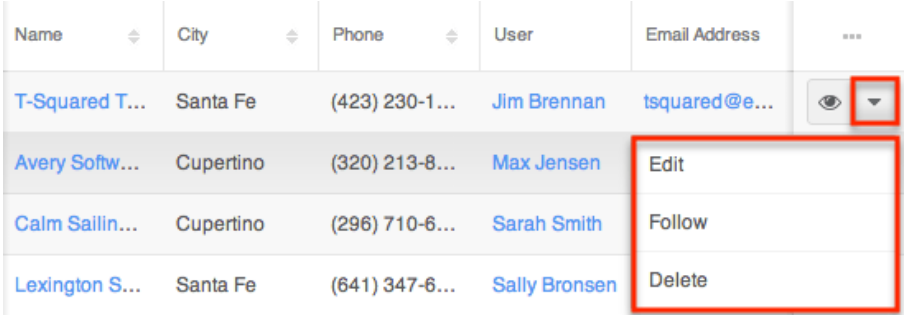
The record's data will display to the right of the list view providing key information regarding the record as well as the related activity stream information. On the upper right of the intelligence pane, there is a Left and Right arrow button that allows you to scroll through the list view's current search results by previewing the next or previous record. To close the preview, simply click the "X" on the upper

right of the intelligence pane.




## Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to edit, follow, or delete specific records directly from the list view.



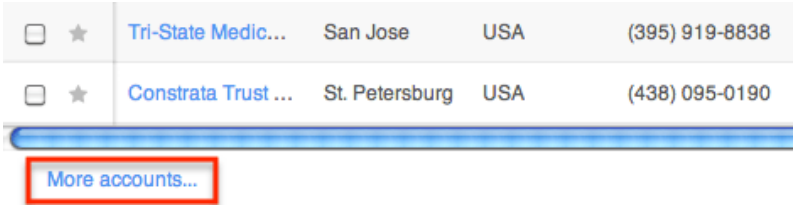

The options in the Record Actions menu allow you to perform the following operations:

| Menu Item | Description |
| --- | --- |
| | |

| | |
|---|---|
| Edit | Edit this account |
| Follow | Follow this account |
| Delete | Delete this account |

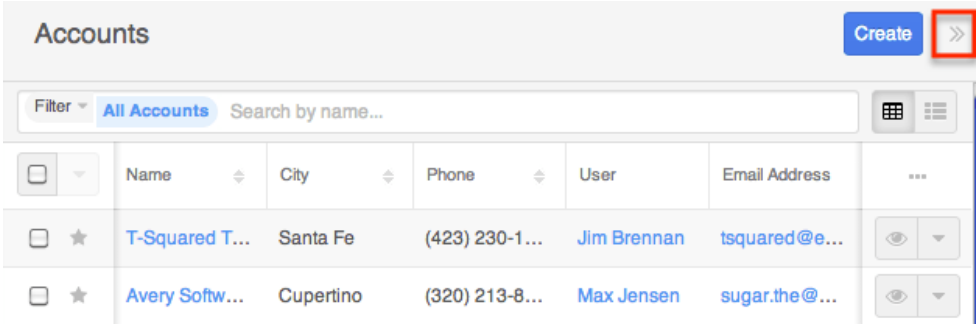
## More Accounts

The list view loads an initial number of records meeting the current search criteria with the option to show additional results at the user's request. By default, Sugar displays 20 records per list view results set, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.To load the next set of list view results, simply click the More Accounts link at the bottom of the list view.




## Right Hand Side Drawer

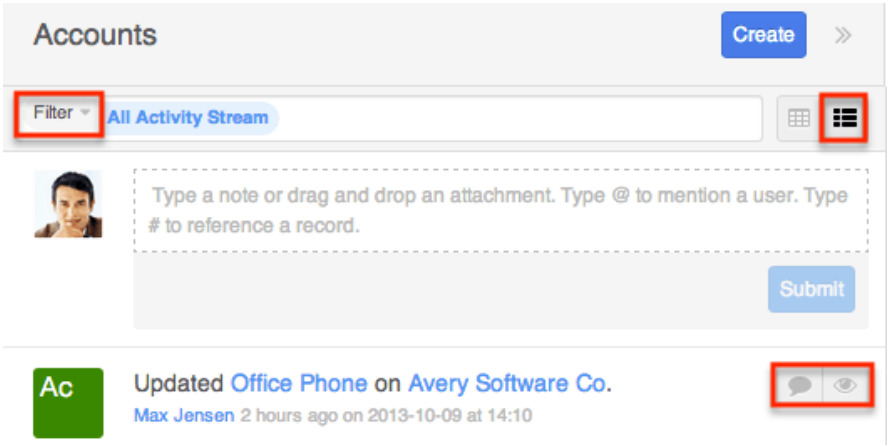
On the upper right of the Accounts list view there is a double arrow icon which allows users to expand the list view to the full screen width. The intelligence pane to the right of the list view will be hidden when the list view is expanded. To reduce the list view's width and reveal the intelligence pane, simply click the double arrow icon again.




## Activity Stream

The Accounts module's activity stream displays user posts made on the Accounts module and record posts relevant to an individual account record. To view the module's activity stream, simply click the Activity Stream button to the right of the

list view's search bar. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts using the comment button to the far right of each post. You can also preview the record referenced in record posts by clicking the Preview button to the right of each post. The activity stream can be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box and selecting the desired message type.

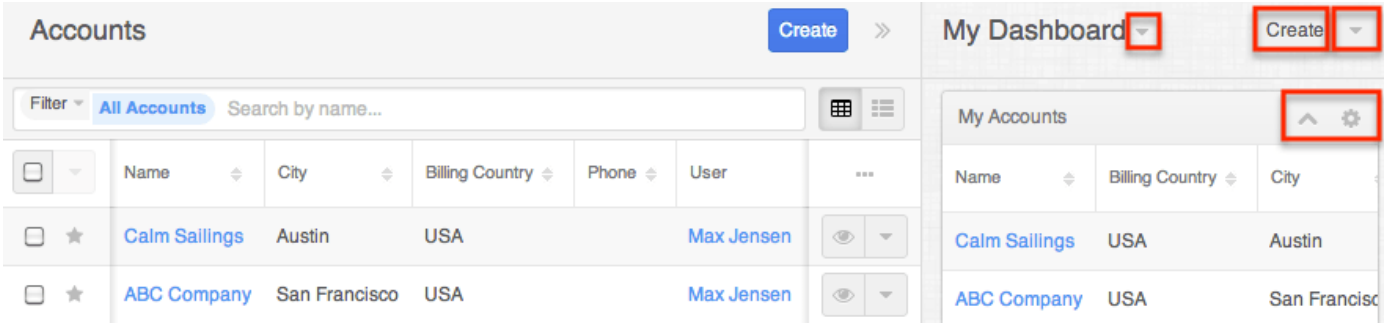



## Intelligence Pane

An intelligence pane displays to the right of the Accounts list view and provides users with valuable record information via various dashlets. The Help dashboard normally displays by default along with the List View Help dashlet and Learning Resources dashlet. The List View Help dashlet provides users with a brief introduction to the module along with a link (e.g. Accounts documentation) to the corresponding documentation in the Application guide. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may create other dashboards for use with the Accounts module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets (e.g. My Accounts, etc.) to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do no wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Accounts module. For more information on editing, creating, and rearranging dashboards and

dashlets, please refer to the Intelligence Pane documentation.



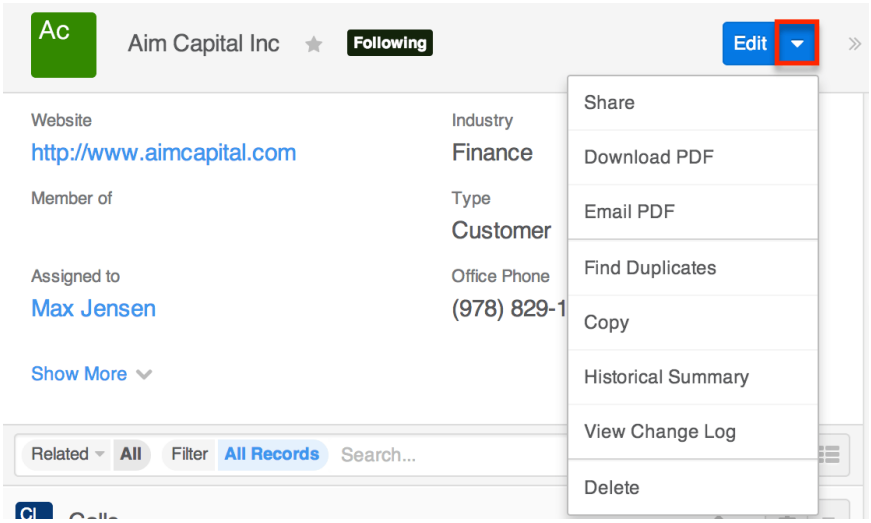

## Accounts Record View

The Accounts record view displays thorough account information including all relevant fields. Beneath the fields you can toggle between viewing an account's subpanels of related records (Contacts, Opportunities, Leads, etc.) and the account's activity stream. The record view can be reached by clicking an account record's link from anywhere in the application including from the Accounts list view.

Please note that you will only be able to view an account record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Users with administrator or developer access have the ability to change the record view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

### Actions Menu

The Actions menu on the top right of each account's record view allows you to perform various actions on the current record.



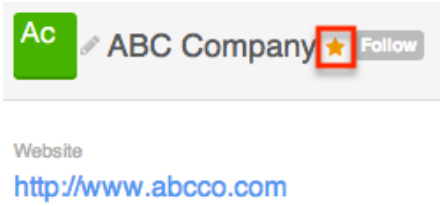

The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this account |
| Share | Share a link to this account via email |
| Download PDF | Download account information as a PDF file |
| Email PDF | Email account information as a PDF attachment |
| Find Duplicates | Locate potential duplicates of this account |
| Copy | Duplicate this account |
| Historical Summary | View a historical summary of activities (e.g. calls, meetings, etc.) related to this account |
| View Change Log | View a record of changes to this account |
| Delete | Delete this account |

## Favorite Designation

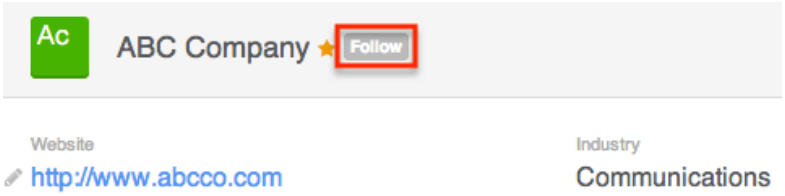
Users have the option to mark account records as favorites via the record view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the Accounts module tab. In the Accounts record view, the star on the right of the account's name is orange once favorited. For more information on how to mark records as favorites, please refer to the Favoriting Accounts section of this

documentation.



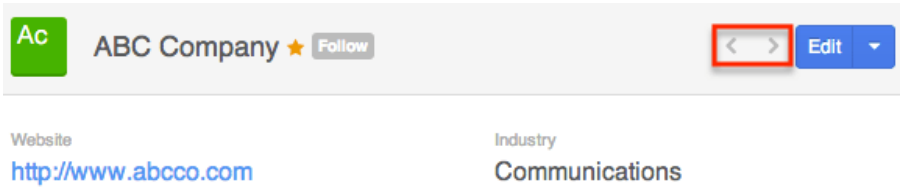

## Following Designation

Users also have the option to follow account records via the record view or list view. This allows users to view record posts from followed accounts on their Home page and Accounts list view activity streams. Each user can personalize their activity stream by viewing posts for records that are most important to them. From the record view, users may follow or unfollow accounts to which they have access using the Follow button to the right of the account's name. For more information on how to mark records to follow via the list view, please refer to the Record Actions Menu section of this documentation. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. If you wish to stop following a specific account record, click the Following button to revert it to gray. Should a user lose access to a record in Sugar, they will automatically stop following that record.



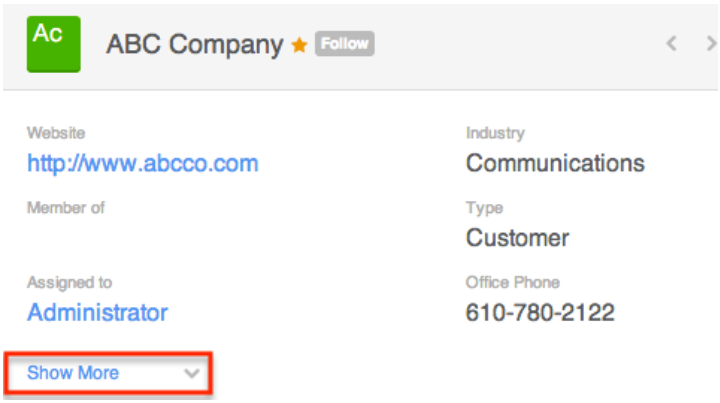

## Next or Previous Record

On the upper right of the Accounts record view, there are two buttons that allow you to page through each account in the Accounts list view's current search results. Clicking the Left arrow button displays the previous account of the current search results while clicking the Right arrow button displays the next account of the current search results.



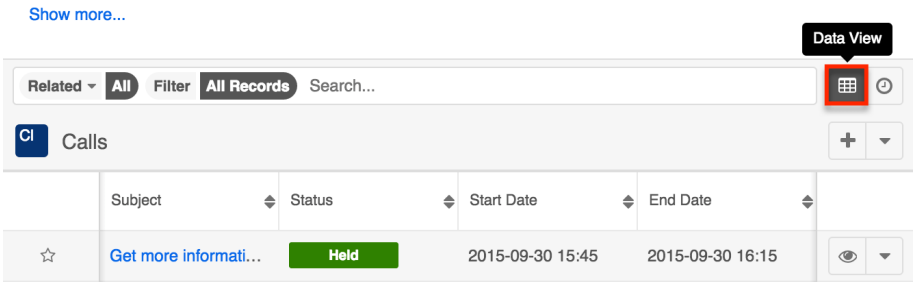
## Show More

The Accounts record view typically display a few key fields (e.g. website, industry, office phone, etc.) on the business card panel with the option to view more fields by clicking the Show More link on the bottom left. Please note that administrators can configure what fields appear on the business card panel via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.




## Subpanels

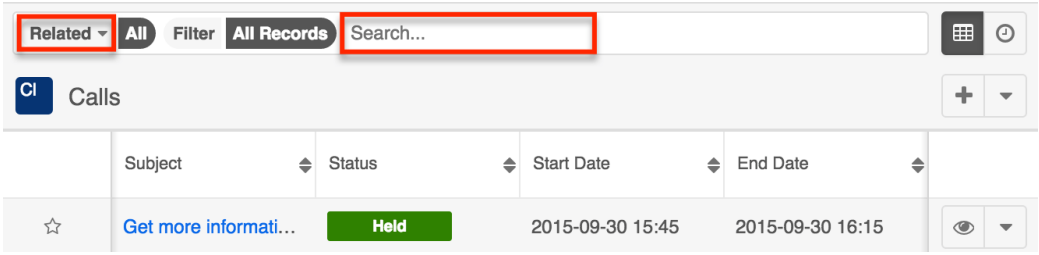
Beneath an account record's fields are subpanels containing related records from various modules as well as campaign interaction history for this account. Selecting the Data View button will display the subpanels rather than the record's activity stream.



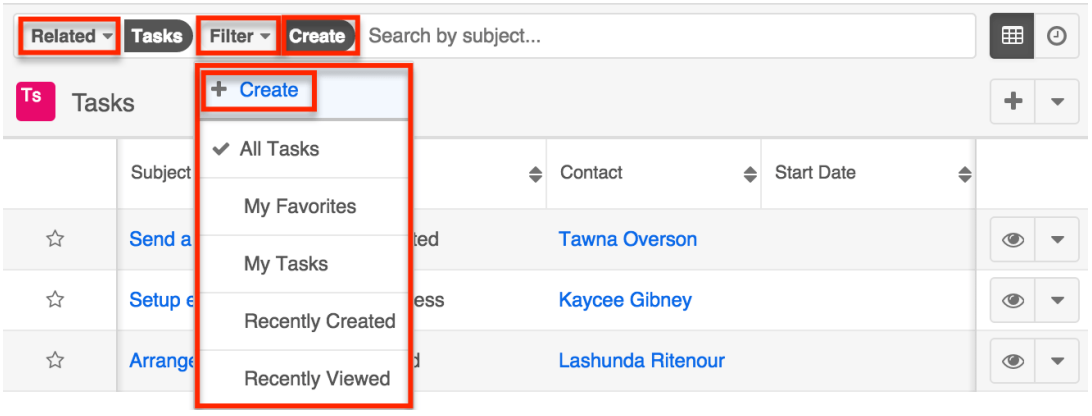

### Filter Options

While in Data View, all of the account record's related records will be displayed beneath the account record's fields. Users have the ability to search for records which appear in the subpanels as well as filter the view to only display a specific module (e.g. Leads, Contacts, etc.). To locate a record by name, enter the keyword into the Search bar, and the subpanel(s) with the matching record(s) will appear below. To filter, simply click the Related option to the far left of the Search bar and select the module whose subpanel you wish to view. Filter and search may be

combined to only display matching records within a selected module. To see all subpanels to which you have access, simply select "All" in the Related options and remove any text from the search bar. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the page. Returning to the page will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.

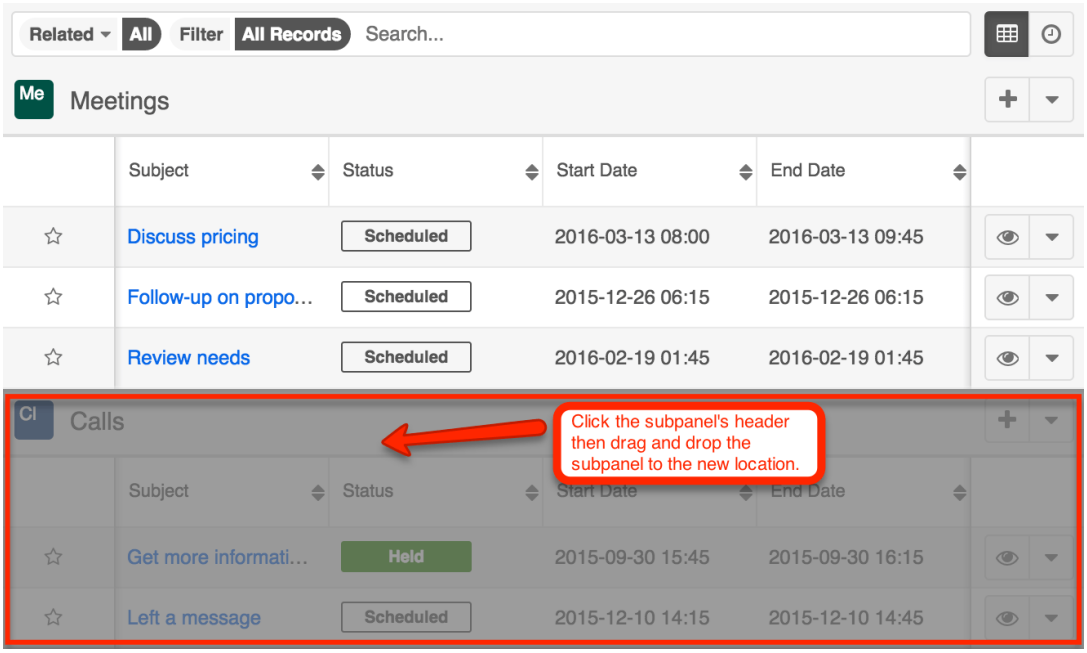



When a Sidecar module (e.g. Contacts, Leads, Tasks, etc.) is selected from the Related options, you have the option to filter the related subpanels further using one of the available options (e.g. My Favorites, Recently Created, etc.). Please note that you can also create custom filters for related Sidecar modules. Once the related module (e.g. Contacts) is selected, either click the Filter option and select "Create" or click "Create" to the right of the Filter option. For more information on creating a related records filter, please refer to the Creating a Related Records Filter section of the Search documentation.




## Reordering Subpanels

Users can easily move subpanels to a new location on the record view by dragging and dropping the subpanel's header. The new subpanel order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared.




Related Record Subpanels

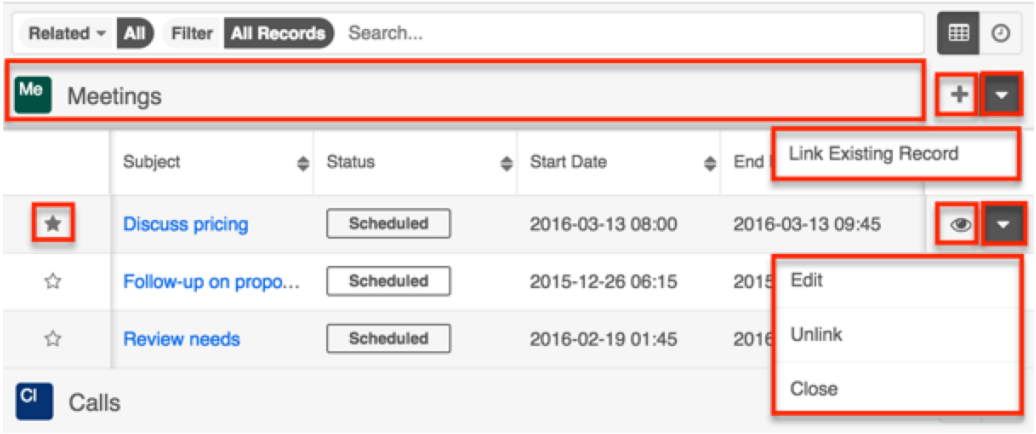
The most common type of subpanels displayed on an account's record view contain the account's related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. For example, an account may be related to multiple contacts which means that the related contacts will be displayed in a subpanel beneath the fields.

Users with administrator or developer access have the ability to change the fields (e.g. Name, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.

Related record subpanels allow the following operations to be performed:

- To view the details of a related record, click the record's name in the subpanel to open it in record view.
- To relate an existing record to the account, choose "Link Existing Record" from the subpanel's Action menu, then locate and select the desired record. Please note that the Link Existing Record option is not available when the relationship is required in the related module (e.g. Opportunities).
- To relate a new record to the account, click the Plus button to the left of the Actions menu, then complete the record view layout and click "Save".
- To preview the related record, click the Preview icon to the far right of the record's row in the subpanel.

- To inline edit the record directly from the subpanel, choose "Edit" from the Actions menu on the far right of the record's row and click "Save" to preserve the change.
- To delete the account's relationship to a record, choose "Unlink" from the Actions menu on the far right of the record's row. This removes the relationship, but does not delete the record itself. Please note that the Unlink option is not available when the relationship is required in the related module (e.g. Opportunities).
- To mark the record as a favorite, click the star icon to the left of the desired record's row.
- To collapse or expand the subpanel, click anywhere on the subpanel's header.
- To change the column size in the subpanel, place your cursor on the column divider and when the Left and Right arrow appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.



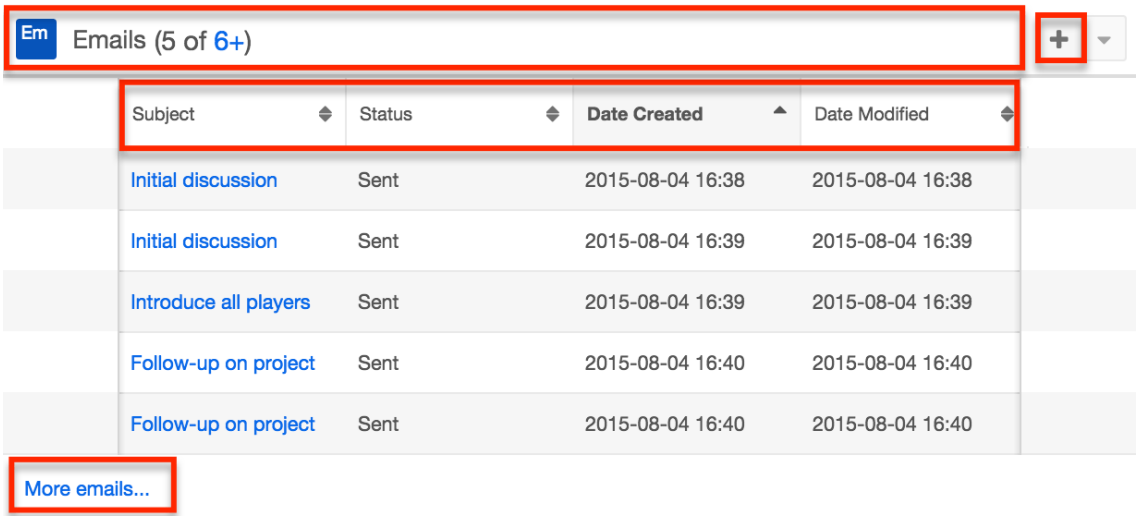

Emails Subpanel

The Emails subpanel in the Accounts module displays both emails implicitly and explicitly related to the account record in addition to all emails from its related contact records. Emails in Sugar are implicitly related to records in Sugar that match an email address in the From, To, or Cc fields in the email. This implicit relationship is made for emails sent from Sugar as well as any email imported into Sugar via Inbound email accounts or email archiving. While composing an email or relating an existing email to a record, users have the ability to set an explicit relationship via the flex relate field by Relating Emails. This allows the email to be explicitly related to a single record from one of many modules.

Note: Administrators can enable or disable emails from related contacts from appearing in the Emails subpanel and History dashlet via Admin > Related Contacts Emails. For more information regarding enabling and disabling related contacts emails, please refer to the Related Contacts Emails section of the Emails documentation in the Administration guide.

The Emails subpanel allows the following functions to be performed:

- To view the details of an email, click the subject in the subpanel to open it in detail view.
- To collapse or expand the subpanel, click anywhere on the subpanel's header.
- Click "+" to create a new email that will have an implicit relationship with this record.
- Sort the emails by Subject, Status, Date Created, Date Modified, or Assigned User.
- Click "More emails" to see any additional emails hidden by the default view.
- To change the column size in the subpanel, place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. For more information on resizing columns, please refer to the Column Resizing section of this documentation.
    - Note: The subpanel column width will not be preserved when you navigate away from the page



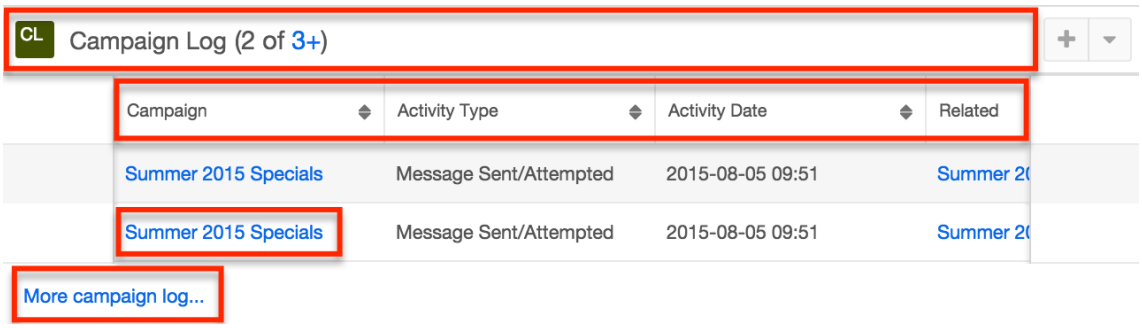

Campaign Log Subpanel

The Campaign Log subpanel contains historical information regarding an account record's interaction with all Sugar campaigns. When a mass marketing campaign is sent to an account (or manually marked as sent in the case of non-email campaigns), the related campaign activity information will appear within the Campaign Log subpanel. This information mirrors the "View Status" page available from within each individual campaign and shows activities such as when a campaign was sent, when the recipient viewed the campaign message, when the recipient clicked a tracked link within the campaign, etc. Since this subpanel contains historical campaign interactions for the account, it cannot be used to associate an account with a campaign or otherwise manage a campaign or target list. For more information on associating an account with a campaign, please refer

to the Adding Accounts to a Target List section of this documentation. For more information on campaigns, please refer to the Campaigns documentation.

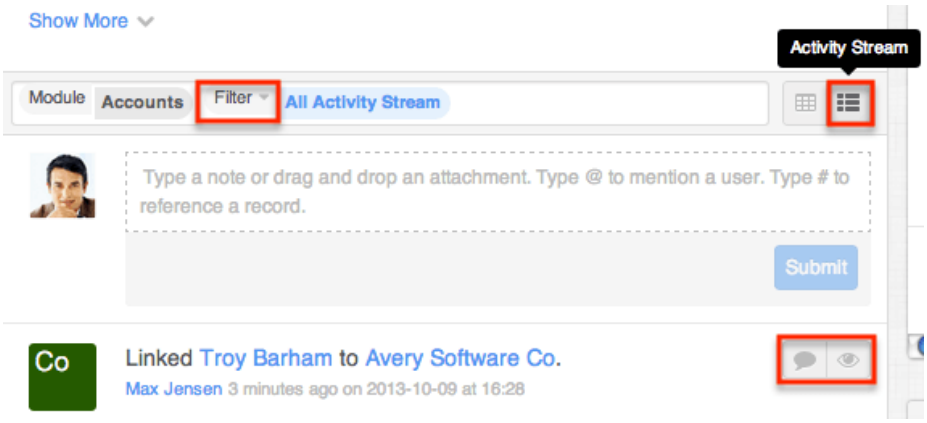
The Campaign Log subpanel allows the following functions to be performed:

- To view the details of a campaign, click the campaign's name in the subpanel to open it in detail view.
- Sort the campaigns by Campaign Name, Activity Type, Activity Date, or Related.
- To collapse or expand the subpanel, click anywhere on the subpanel's header.
- To load the next set of records in the subpanel, click the More campaign log link on the bottom left of the subpanel.
- To change the column size in the subpanel, place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. For more information on resizing columns, please refer to the Column Resizing section of this documentation.
    - Note: The subpanel column width will not be preserved when you navigate away from the page.




## Activity Stream

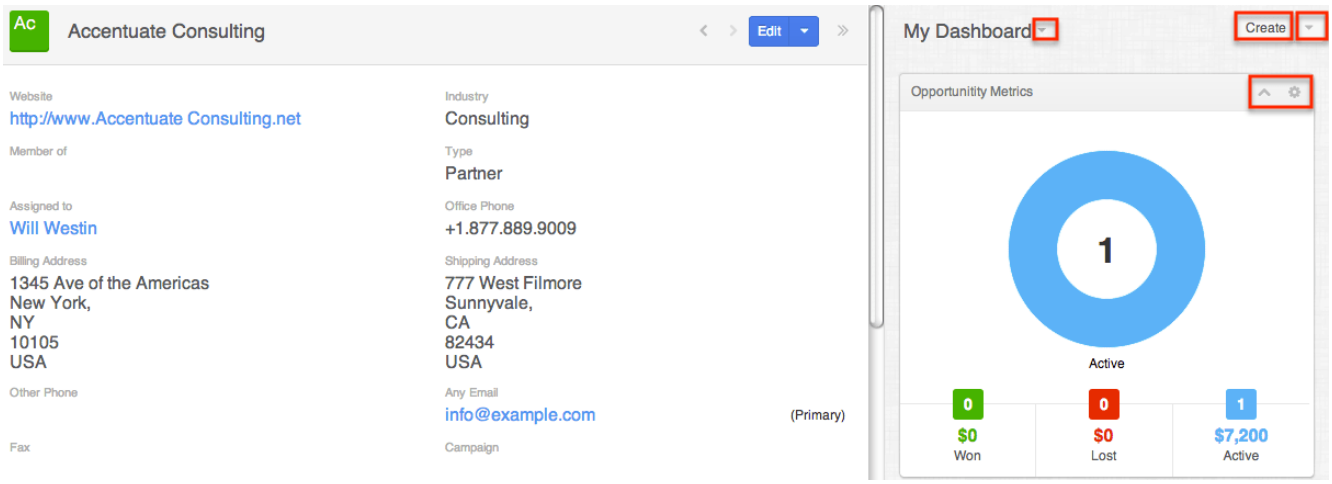
The Account record view's activity stream displays user posts and record posts specific to the individual account record. To view the record's activity stream, simply click the Activity Stream button below the account's fields. Users can view all posts in the record view's activity stream even if they do not follow the record in Sugar. Please note that you must follow the record if you wish to view the record view posts via the Home page or List View activity stream. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts by clicking the Comment button to the far right of each post, entering in your comment, then clicking "Reply". You can also preview the record referenced in the record post by clicking the Preview button.The activity stream can also be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box then selecting the desired message type.




## Intelligence Pane

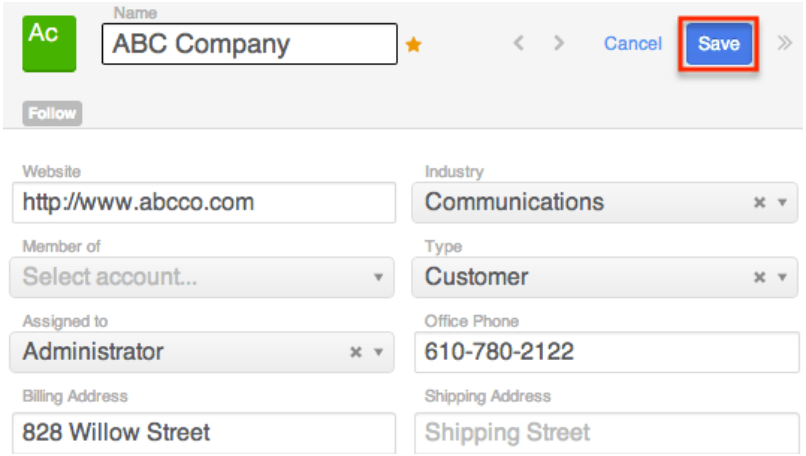
An intelligence pane displays to the right of the account's record view and provides users with valuable information specific to the account's sales, activities, etc. The Help Dashboard normally displays by default along with the Record View Help dashlet and Learning Resources dashlet. The Record View Help dashlet provides users with a brief introduction to the module along with some instructions to help users utilize and navigate around the record view. A link to the corresponding documentation (e.g. Accounts documentation) in the Application guide is also provided within the Help dashlet. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard, which will display some stock dashlets (e.g. Planned Activities dashlet, History dashlet , etc.) by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". For example, the History dashlet displays calls and meetings that have taken place as well as related emails for the account record. By default, the Opportunity Metrics, Case Summary, News Feed, Planned Activities, and History dashlets are available in the stock dashboard called "My Dashboard". Users may choose to view any of their dashboards using the triangle to the right of the current dashboard's name and may create other dashboards for use with the Accounts module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do not wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Accounts module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.




# Editing Accounts

Accounts may be edited at any time to update or add information to the record. You can make changes to existing account records via the Accounts record view. The record view is available within the Accounts module and includes all of the Account fields you should need.



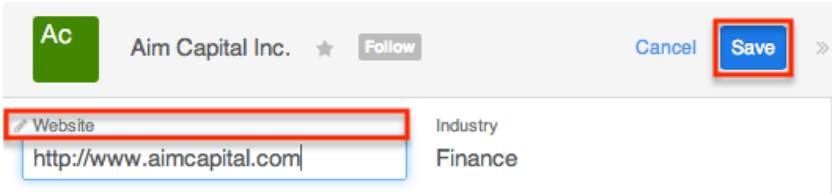

Please note that your ability to edit accounts in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure the Accounts record view via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

## Editing Inline Via Record View

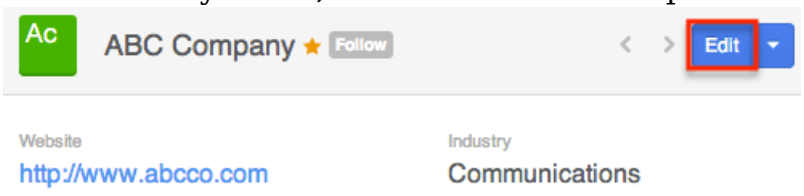
Users can edit individual fields on the Accounts record view without entering the

full edit mode by clicking the field name. Fields which are available for inline editing will display a pencil icon when hovering on the field name or value. This will allow users to type or select a new value. Click "Save" to preserve the changes made to the field.



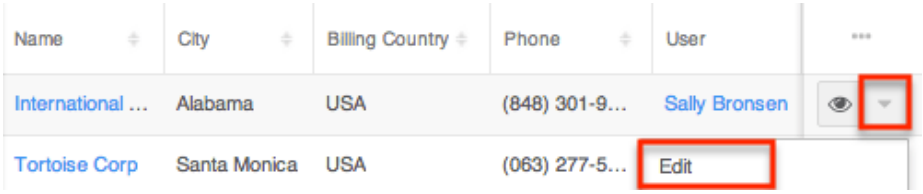

## Editing Via Record View

You can edit many account fields at once via the record view by clicking the Edit button on the upper right of the page. Once the record view layout is open, update the necessary fields, then click "Save" to preserve the changes made.




## Editing Inline Via List View

You can also edit individual fields on the Accounts list view without entering the full edit mode. Click the Record Actions menu to the far right of the record's row and select "Edit".




The fields on the record's row will open up allowing users to type or select a new value. You can click the double-arrow icon on the upper right of the page to expand the list view for editing. Click "Save" to preserve the changes made to the account record.




Note: Text area fields are not inline editable from list views.

# Deleting Accounts

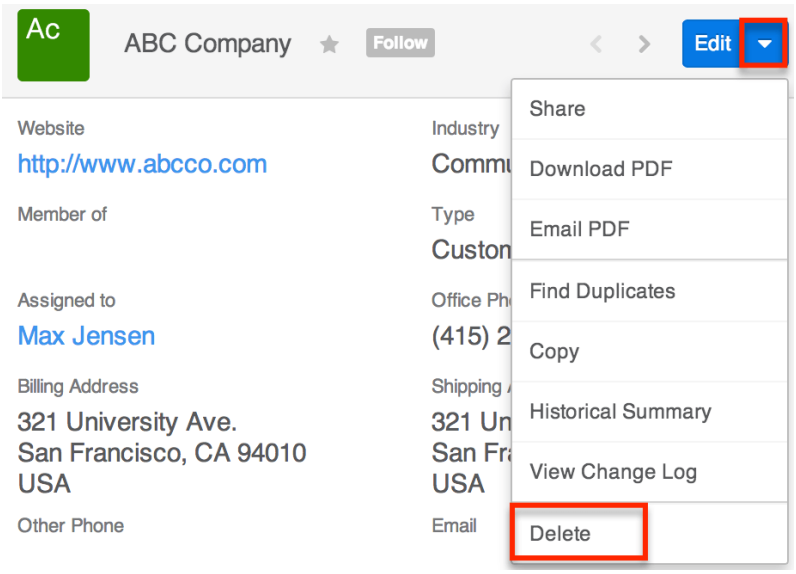
If an account record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Accounts record view or list view. Deleting via the record view allows you to delete a single record while the list view allows for mass deleting multiple records at once as well as single record deletions. Deleting account records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

Please note that your ability to delete accounts in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

## Deleting Via Record View

Use the following steps to delete an account record via the record view:

1. Navigate to an account's record view.
2. Select "Delete" from the Actions menu.

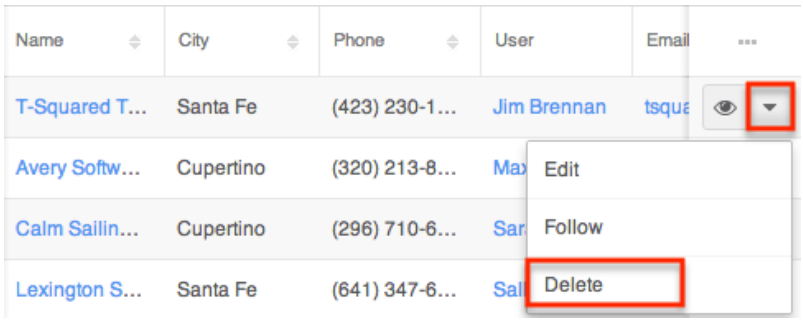



3. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

## Deleting Via List View

Use the following steps to delete an account record via the list view:

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the Module Search to find the Account record you wish to delete.
3. Click the Record Actions Menu to the far right of the record's row and select "Delete".

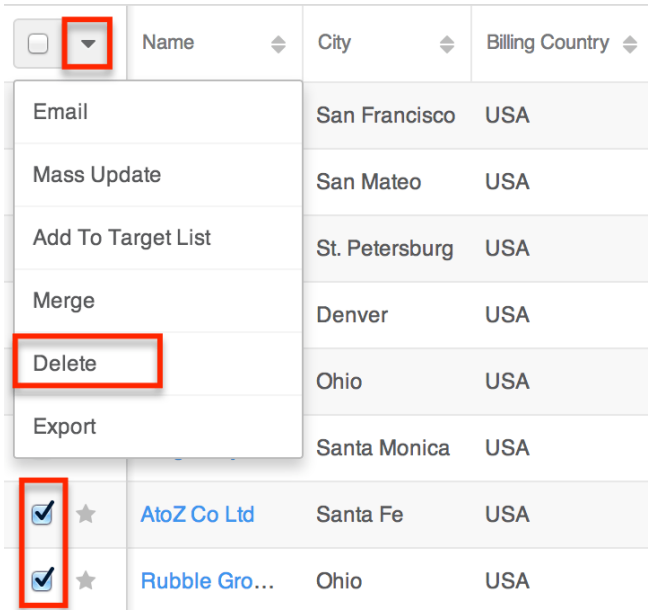



4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

## Mass Deleting Via List View

Use the following steps to delete one or more account records via the list view:

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the Module Search to find the Account records you wish to delete.
3. Select the desired account records then choose "Delete" from the Actions menu.




4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

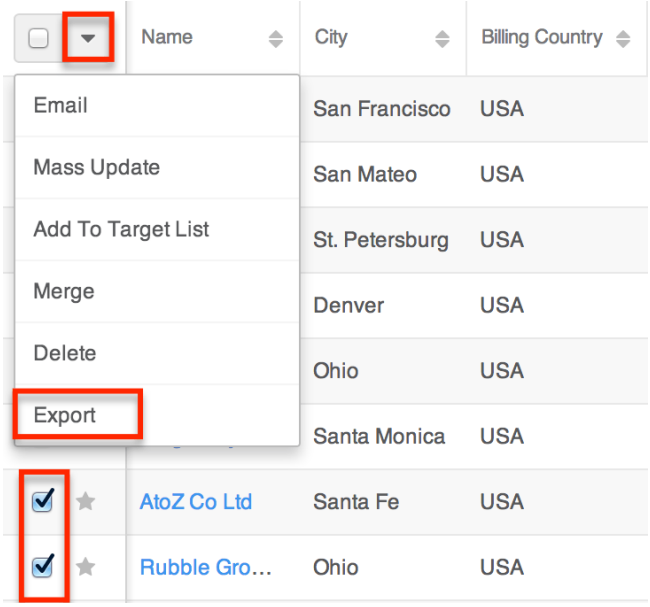
You can also use the Select All feature in the list view, which will allow you to

easily select the first 1000 records in the result set. If you wish to delete more than 1000 records or delete a specific group of records on the list view, please use the in module search to perform the deletions in smaller batches.

## Exporting Accounts

Sugar's Export option allows users to download all fields for the selected accounts to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Account data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered accounts back into Sugar. For more information on updating existing records via import, please refer to the Import documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of account records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Accounts may be exported from the Accounts list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for accounts and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.




Please note that your ability to export accounts from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

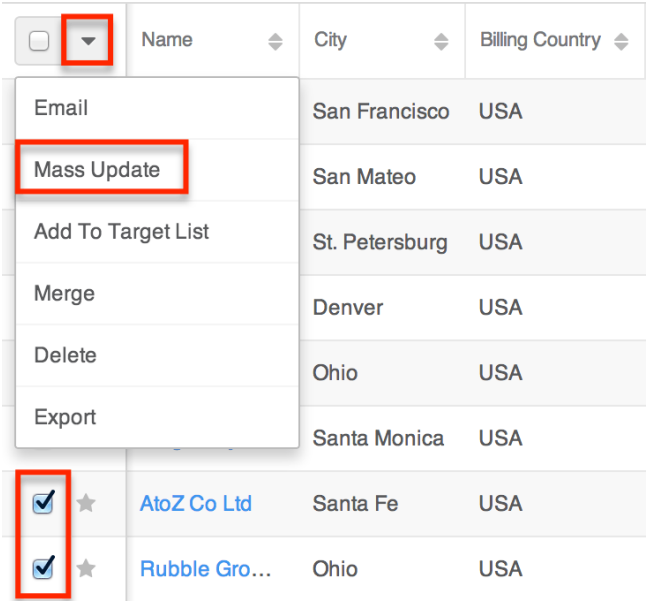
# Mass Updating Accounts

Mass Updating allows users to make the same change to multiple account records at once from the Accounts list view. Users with administrator or developer level access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide. You can use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to update more than 1000 records or update a specific group of records on the list view, please use the filter option in module search to perform the updates in smaller batches.

Please note that your ability to mass update accounts may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

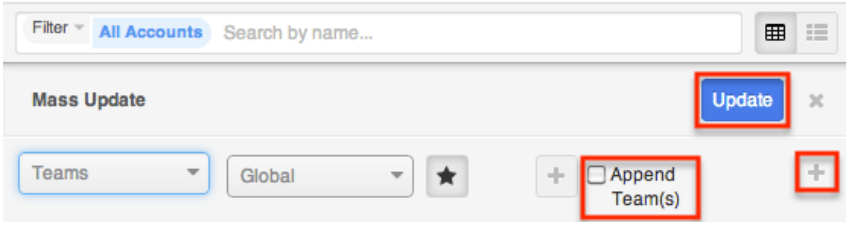
Use the following steps to mass update account records from the list view:

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the list view's Module Search to identify accounts you wish to modify.
3. Select the desired accounts then choose "Mass Update" from the Actions menu.




4. The Mass Update panel will appear below the search bar. Set values for the field(s) you wish to alter.
    - To add additional fields for mass update, click the Plus icon to the right of the dropdown list.

- Note: For the Teams field, mark "Append Team(s)" to add the teams specified here to any existing team assignments. Not marking the checkbox will replace the existing team assignment with the new one.




5. Click "Update" to save the changes to all of the currently selected account records.

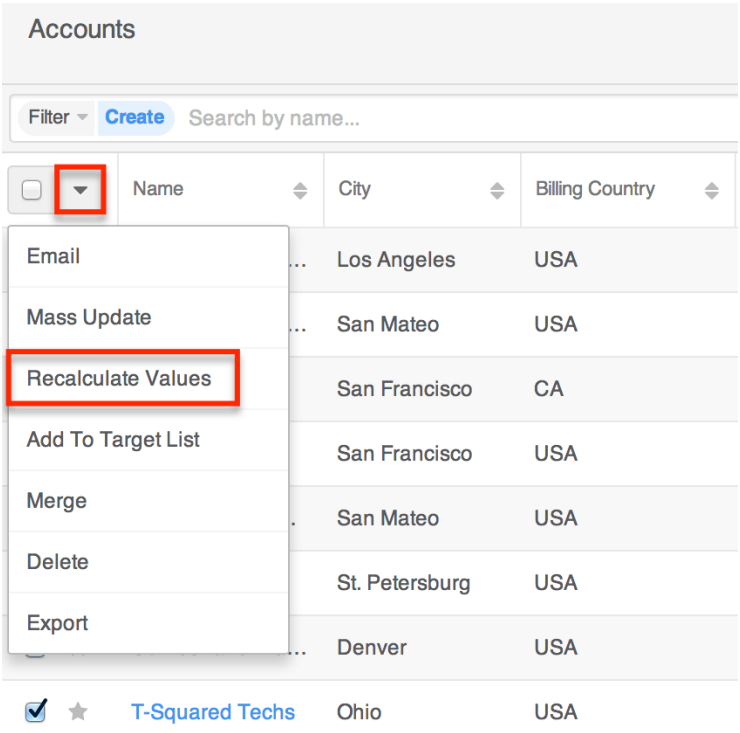
## Recalculating Calculated Values

This feature allows calculated values to be recalculated following the addition or alteration of a calculated field in Studio. For more information on calculated fields, please refer to the Studio documentation in the Administration guide. Sugar allows you to select up to 1000 records at a time for recalculating values. If you desire to recalculate values for more than 1000 records, you will need to perform the recalculation in several batches.

Note: This action will not appear unless the user is an Admin or has developer-level access to the module and if there is at least one calculated value in that module. Please note that your ability to recalculate values may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Recalculate Values option.

The following steps cover recalculating values for records from the Accounts list view as an example:

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the list view's Module Search to identify accounts you wish to update.
3. Select the desired accounts then choose "Recalculate Values" from the Actions menu.



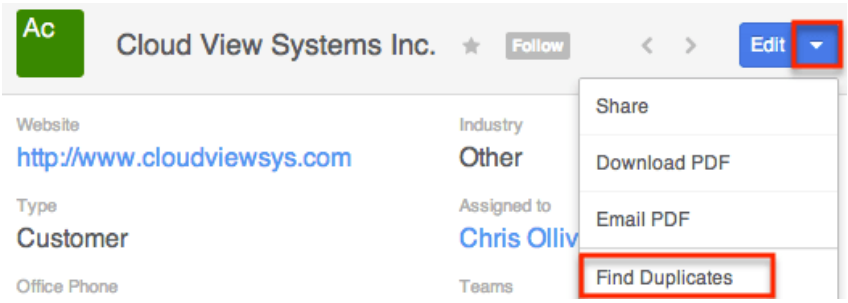

## Finding Duplicate Accounts

Between multiple users working in Sugar, importing new records, and converting leads, it is possible for duplicate account records to be accidentally input to the system. Before creating a new account record, a good practice is to first check that the account does not already exist in Sugar. You can locate duplicate records for cleanup using module search from the Accounts list view. Searching for accounts with similar names or other information can turn search into a powerful, duplicates-finding tool. Sugar also provides a wizard for finding potential duplicates that is available from the Accounts record view and may be used as shown below. If duplicate account records are detected, you can perform a merge per the Merging Accounts section of this documentation.

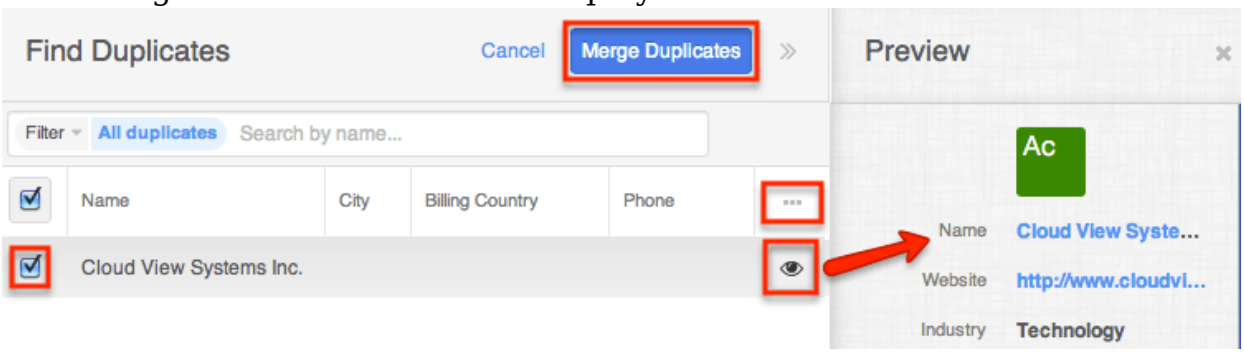
Please note that your ability to use the Find Duplicates action may be restricted by any role which prevents account deletion. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Find Duplicates option.

Use the following steps to locate duplicate accounts using the Find Duplicates option from the Accounts record view:

1. Navigate to an account's record view.
2. Choose "Find Duplicates" from the Actions menu.




3. Potential duplicate account records will be listed on the Find Duplicates page. Select the duplicate record(s) you wish to merge then click "Merge Duplicates".
    - You can preview the duplicate record's details by clicking the Preview button to the far right of the records row.
    - You can search for specific records from the Accounts list view if you wish to check for more possible duplicates. For more information on performing a search, please refer to the Module Search section of this documentation.
    - You can also click the Column Selection icon above the Preview button to change the list of fields that display on the list view column headers.




Once you click "Merge Duplicates", the merging process with the current record will begin. For instructions on performing the merge that follows, please refer to Steps 3-9 of the Merging Via List View section of this documentation.

## Merging Accounts

When duplicate records are identified in Sugar, you have the option to merge two or more accounts into a single record. Once the merge is complete, the duplicate account record(s) will be deleted, and the primary record will remain. Please note that all relationships belonging to the duplicate accounts will be merged to the primary record meaning that any calls, meetings, cases, etc. related to the duplicate account record(s) will automatically be related to the resulting, merged account record.

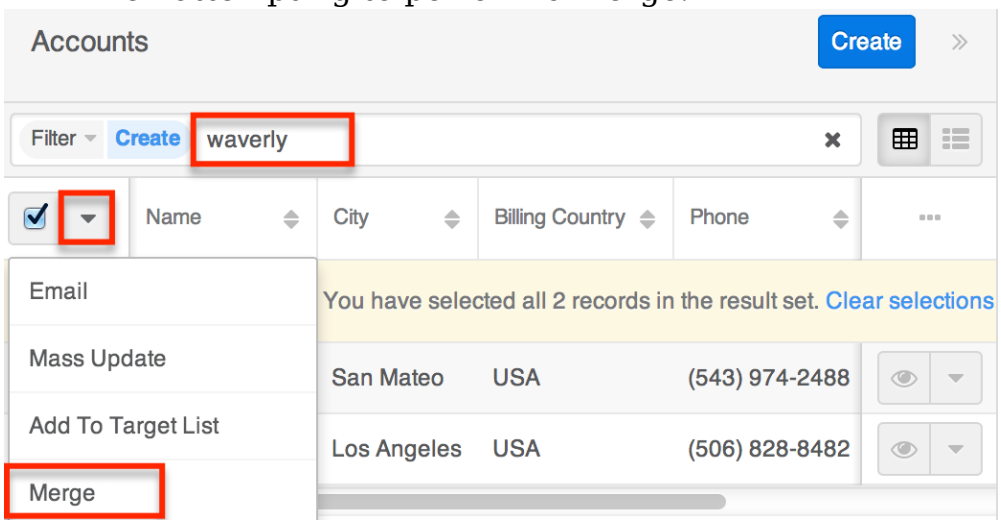
Note: Date Created, Date Modified, and Password field types are not supported when merging duplicate records in Sugar.

## Merging Via List View

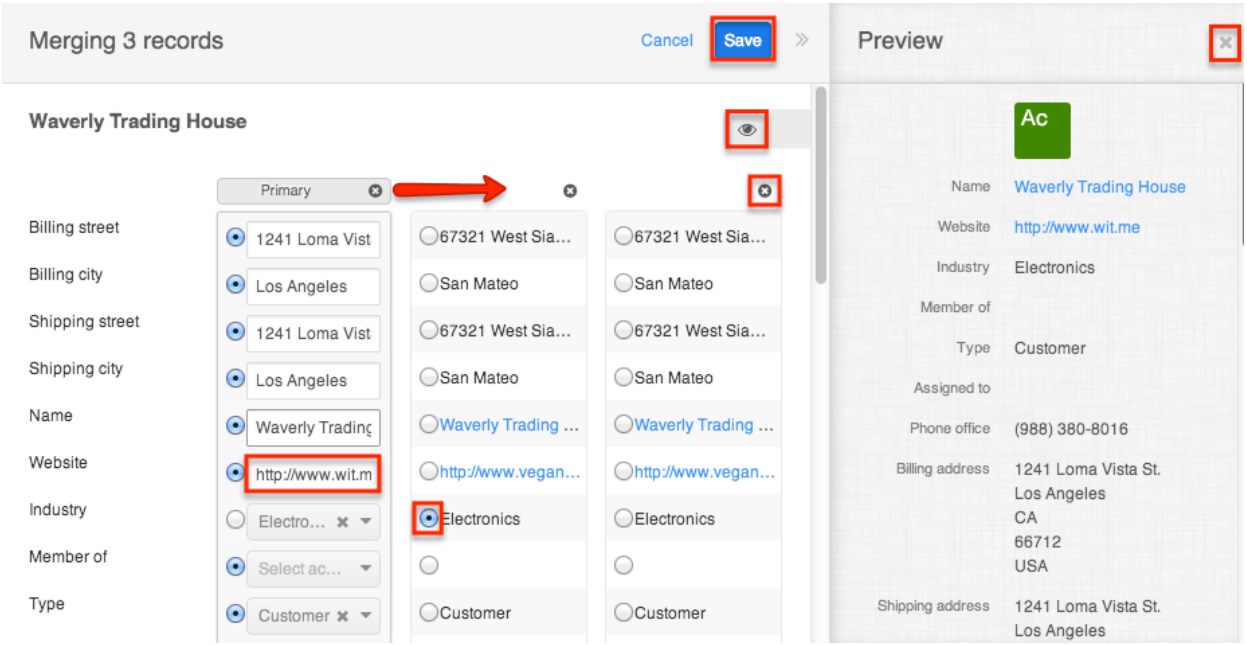
Module Search may be used to identify duplicate accounts by, for example, searching for records with similar names. Once your search has identified duplicate accounts, you can merge them directly from the Accounts list view.

Use the following steps to merge accounts via the list view:

1. Use the list view's Module Search to identify duplicate accounts.
2. Possible duplicates will be displayed in the list view. Select the duplicate record(s) that you wish to merge.
    - Please note that up to five records may be merged at once in Sugar. An error message ("Invalid number of records passed. The valid range is from 2 to 5 records.") will appear if more than five records are selected when attempting to perform a merge.




3. Select "Merge" from the Actions menu to display the Merging Records page. The primary record's field values are displayed on the left while other record's values are in columns to the right. For convenience, fields with differing values will appear on the top of the list. Saving the merge will preserve only the field values marked with the radio button into a single record.




If 3 or more records are selected to be merged, an X icon will appear at the top right of each record. Clicking the "X" will remove the record from the merge process but will not delete the record.

4. To change which record is considered the primary, drag and drop the Primary label on the top of a different column.
5. Review the field values in each column and click the radio button to the left of the value that should appear on the final record. You can also manually type or select a new value for any field as necessary.
    - Note: Fields you do not have Edit access for cannot be edited on the merging records page.
6. Preview what the final, merged record will contain as you work by clicking the eye icon to display the preview in the Intelligence Pane.
7. Click "Save" once all fields you wish to appear on the single, merged record have their radio buttons selected.
8. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Confirm" to proceed.

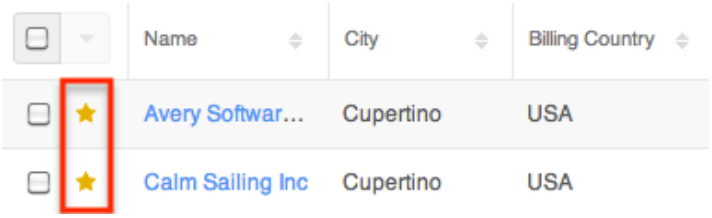
## Favoriting Accounts

Each Sugar user has the option to designate their own favorite accounts which are important or will be viewed often so that they can easily be accessed via search or from the Accounts module tab. Once records are marked as favorites, select "My Favorites" from the Filter option next to the Search bar to retrieve your favorites or select from your most recent favorites directly from the Accounts module tab .

### Favoriting Via List View

Use the following steps to mark records as favorites via the Accounts list view:

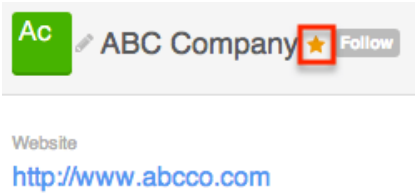
1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the Module Search to find the Account records you wish to mark as favorites.
3. Mark the star icon on the left of each desired account's row.
4. To remove the account as a favorite, click the star again to revert it to gray.




## Favoriting Via Record View

Use the following steps to mark records as favorites via the Accounts record view:

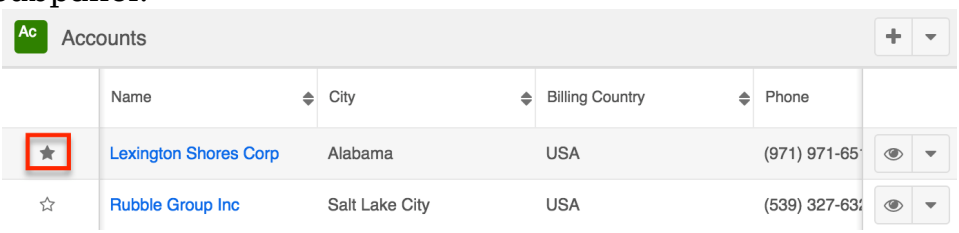
1. Navigate to an account's record view.
2. Click the star icon to the right of the account's name in the upper left of the record view to designate it as a favorite.
3. To remove the account as a favorite, click the star again to revert it to gray.




## Favoriting Via Subpanel

Use the following steps to mark account records as favorites via the subpanel in related modules:

1. Navigate to a related module's record view.
2. Click the star icon to the left of the desired record's row in the Accounts subpanel.



3. To remove the account as a favorite, click the star again to revert it to white.

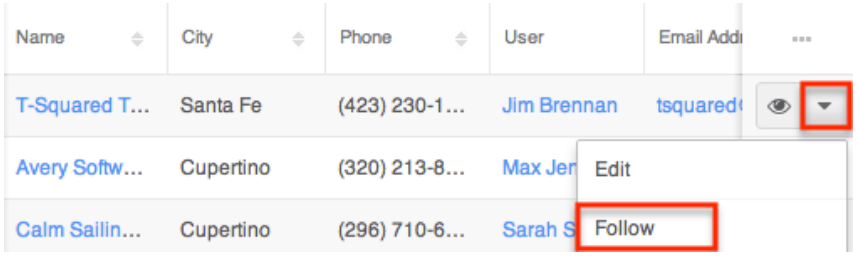
## Following Accounts

Users can also choose to follow specific account records to which they have access to in Sugar by clicking the Follow button (If grayed out) to the right of the account's name. This allows each user to personalize their activity stream by specifying which records' posts should appear on the activity streams displayed on their Home page and Accounts list view. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. Should a user lose access to a record in Sugar, they will automatically stop following that record.

### Following Via List View

Use the following steps to mark a record to follow via the Accounts list view:

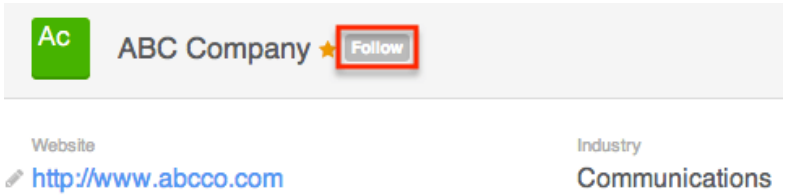
1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the Module Search to find the Account records you wish to follow.
3. Click the Record Actions menu to the far right of the records row and select "Follow".
4. To stop following the account, click the Record Actions menu then select "Unfollow".



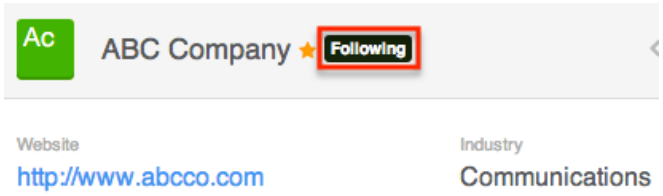

### Following Via Record View

Use the following steps to mark a record to follow via the Accounts record view:

1. Navigate to an Accounts record view.
2. Click the Follow button to the right of the accounts name.

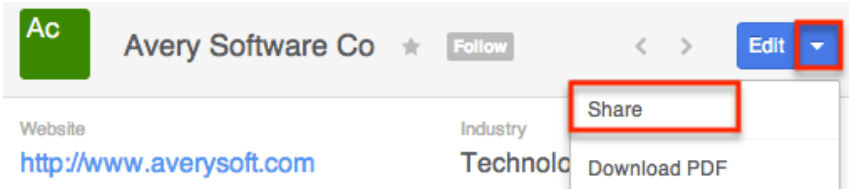



3. To unfollow the account, click the Follow button again to revert it to gray.




## Sharing Accounts

Individual Account records can be shared with other users in your organization by sending an email with the record's link directly from the record view. In the account's record view, select "Share" from the Actions menu which will open a Compose Email window including the URL of the account record. Enter the recipient(s) email address in the To field then click "Send".

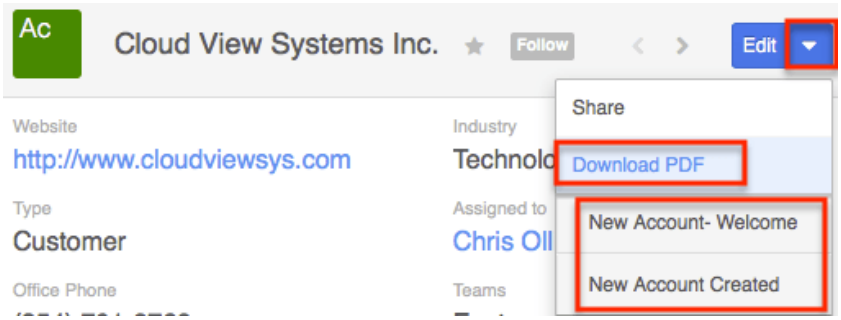



Users can simply click the link in the email to access the account record in Sugar. Please note that the user must be logged into Sugar in order to access the record. Users will only be able to view the shared record as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

## Downloading Account Information as a PDF

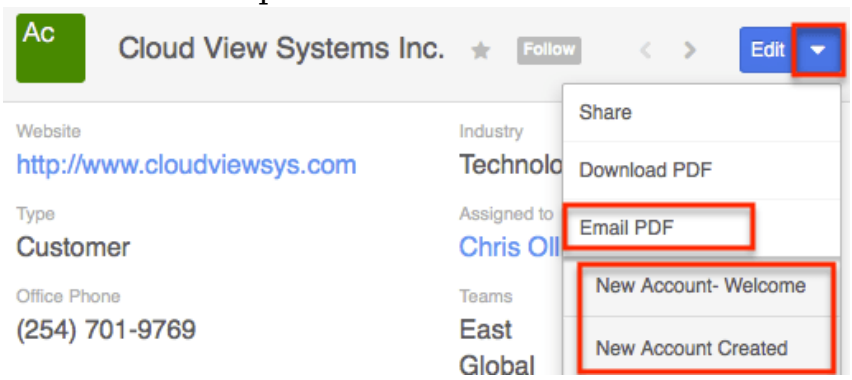
Users have the option to download account information as a PDF file via the Accounts record view by clicking the Actions menu and selecting "Download PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Download PDF option in the Actions menu. Simply select one of the templates to generate the PDF file to view or save onto your local machine. Please note that the Download PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via

Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.

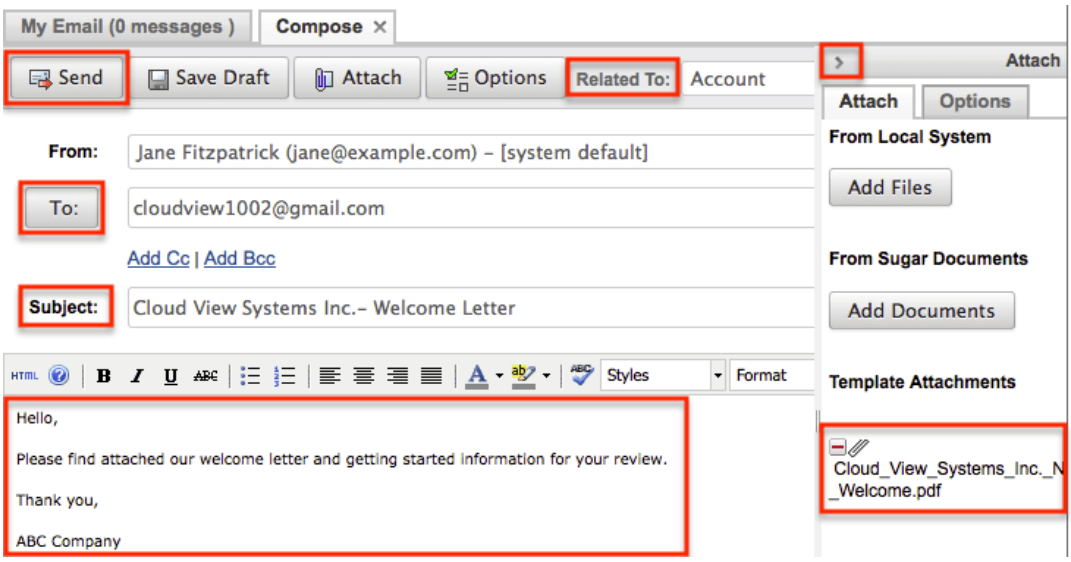



## Emailing Account Information as a PDF

Users also have the option to email account information as a PDF file using any of the available Accounts module templates using Sugar's email client. Simply click the Actions menu and select "Email PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Email PDF option in the Actions menu.



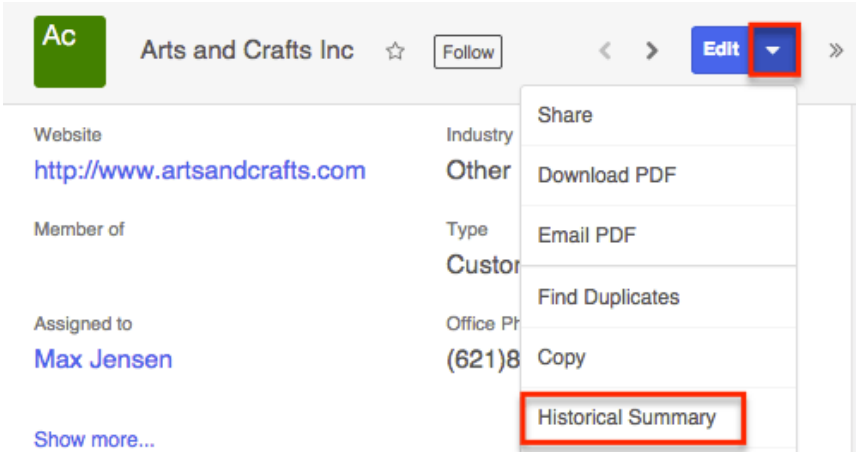

Select one of the templates to open a Compose window in the Emails module. The email's To field will automatically populate with the email address of the account record, and the Subject field will display the account's name. The email is automatically related to the account record, and the chosen account PDF will be attached. You can update the fields as necessary and enter a body for the email message then click "Send". For more information onsending emails via the Emails module, please refer to the Emails documentation.




Please note that the Email PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.

## Viewing Activities' Historical Summary

Users can easily view quick details for the various related activities (e.g. calls, meetings, notes, emails, etc.) that have taken place via the Historical Summary option. Simply navigate to the account's record view and select "Historical Summary" from the Actions menu to view the historical activities related to the account in one place.

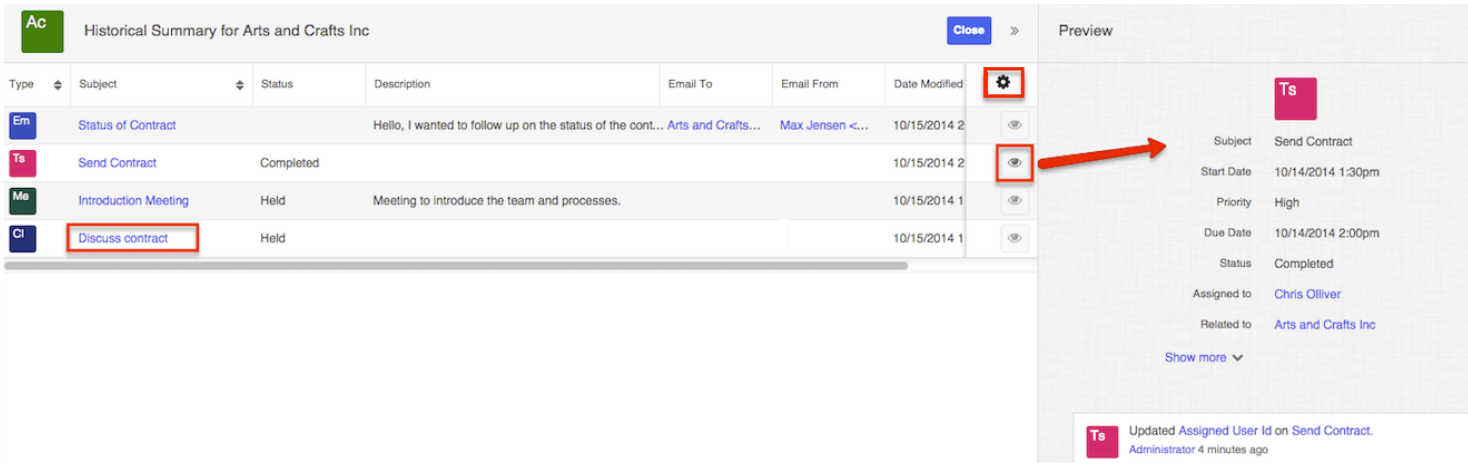



The Historical Summary page will display each activity's type, subject, status, description, date modified, etc. and you can simply click the activity's name to view the full details for each activity. Please note that you can add Date Created and

User fields by clicking the Column Selection icon to the far right of the list view column headers. You can also preview the activity record via the intelligence pane by clicking the Preview icon to the far right of each record's row. It will provide users with key information regarding the record as well as the related activity stream information (if any). For more information on activity streams, please refer to the Activity Streams documentation. Please note that preview is only available for modules (e.g. Task, Note) using the Sidecar user interface.

The historical summary list view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the system's default column order.

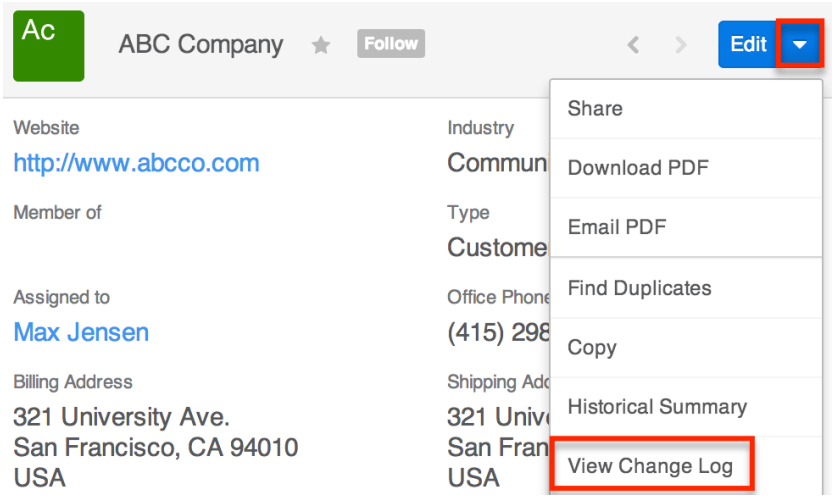
Users can also easily adjust the size of columns in the historical summary list view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the Historical Summary list view is different from the default column width.



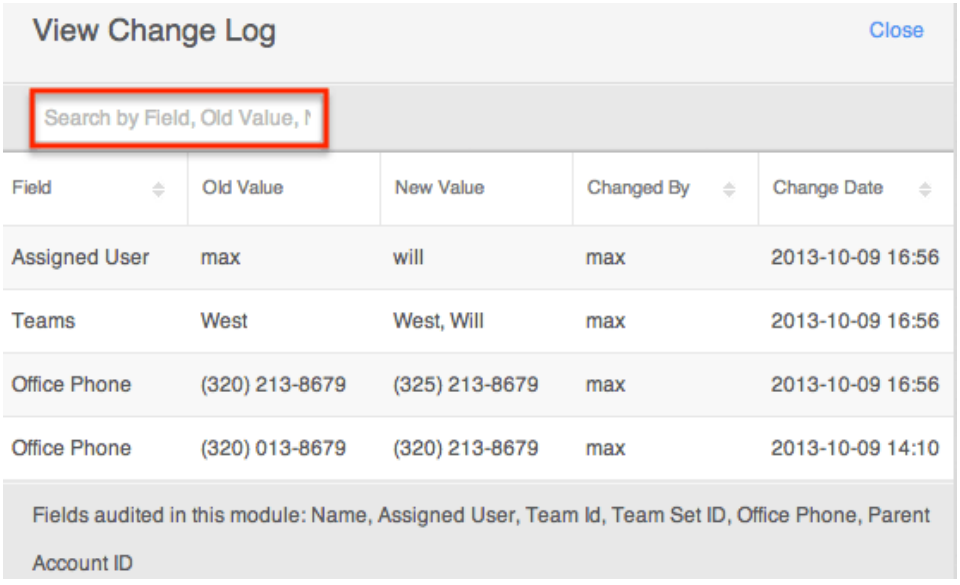

## Viewing Account Change Logs

Changes made to each account record are tracked over time, and users are able to

view the history of changes via the change log in each account's record view. To view the change log, navigate to an account in record view and select "View Change Log" from the Actions menu. Please note that only fields marked as "Audit" in Admin > Studio will be displayed in the change log. For more information on designating for audit, please refer to the Studio documentation in the Administration guide.




Once the change log opens, you can view the details of historical changes and can search by field name, old value, etc. by entering the keyword into the search box.




## Emailing Accounts

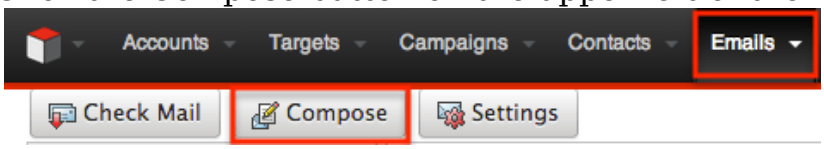
Sugar allows users to compose and send outbound emails to accounts. There are various ways to send outbound mail to accounts including emailing via the Emails module, Emails quick compose, Accounts module, campaigns, and workflows. Please note that administrators in Sugar must first configure the outbound mail

server for the system via Admin > Email Settings in order for users to send outbound emails. For more information on setting up the system email settings, please refer to the Emails documentation in the Administration guide. Users will also need to have their email settings configured in their user preferences prior to sending outbound email from the Emails module, Emails quick compose, or Accounts module. For more information on setting up your user preferences' email settings, please refer to the Getting Started documentation.

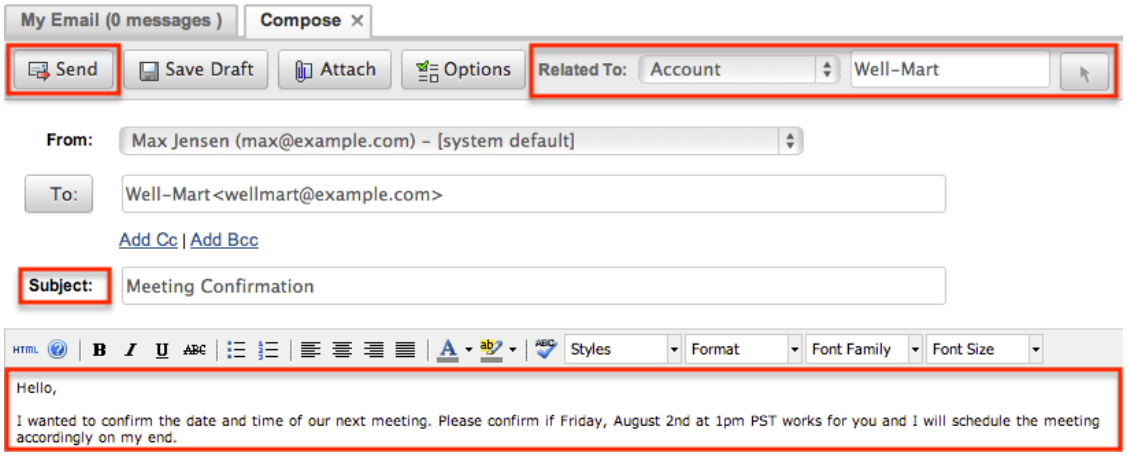
## Emailing Via the Emails Module

Use the following steps to compose and send an email to an account via the Emails module. For more detailed information on sending emails via the Emails module, please refer to the Emails documentation.

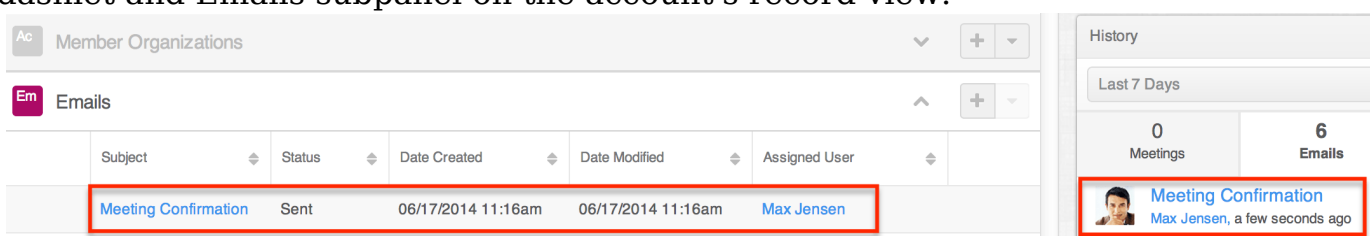
1. Navigate to the Emails module by clicking the Emails module tab.
2. Click the Compose button on the upper left of the Emails module.




3. For the "Related To" field, select "Accounts" as the module then type or select the desired account's name. The email's To field will automatically populate with the name and email address of the selected account record.
4. Enter a subject and body for the email message then click "Send".



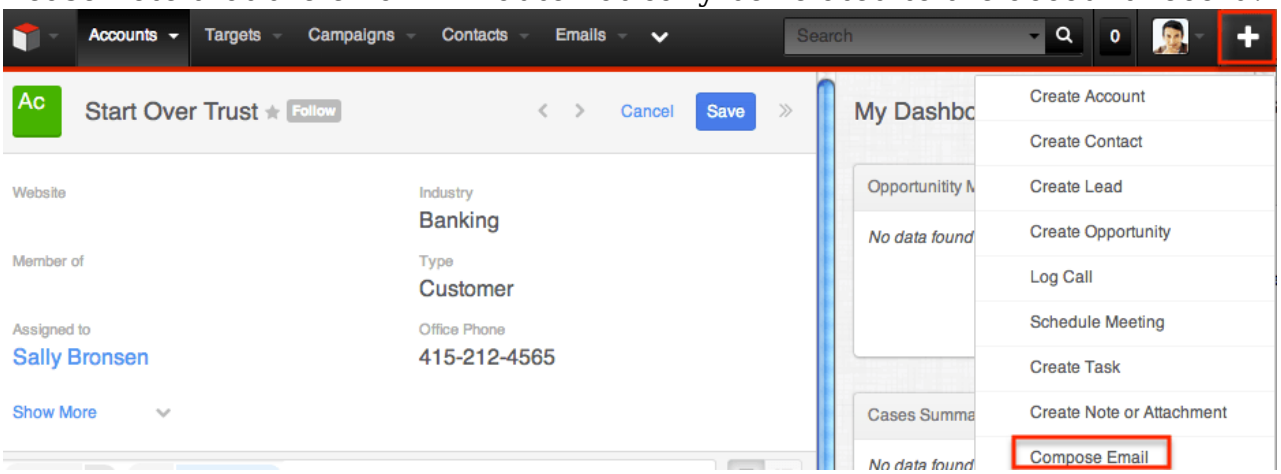

Once the email is sent successfully, the email record will appear in the History dashlet and Emails subpanel on the account's record view.



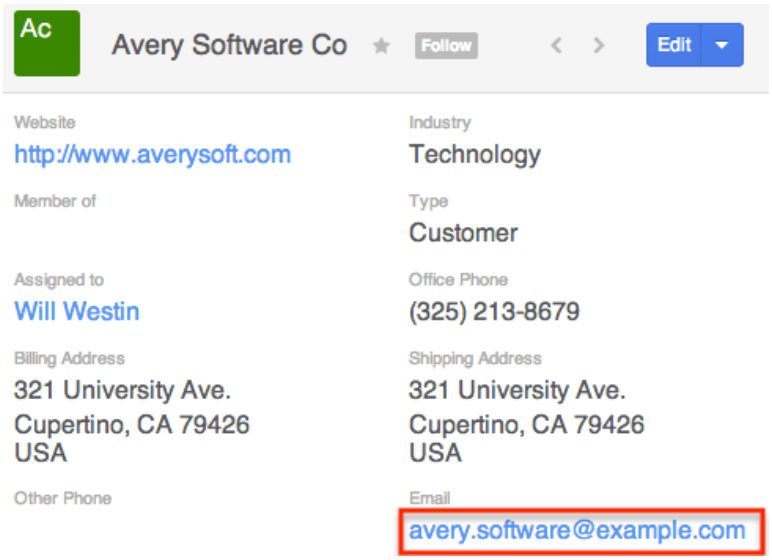
## Emailing Via Quick Compose

The quick compose option allows users to compose emails from various places in Sugar without navigating away from the current page.

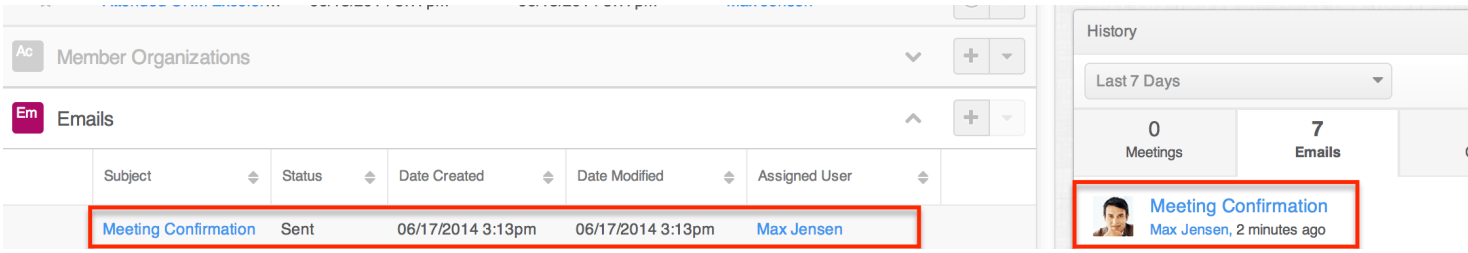
While viewing an account record, you can select "Compose Email" from the Quick Create menu on the top right of any Sugar page. Once the Compose Email form opens, you can manually enter in the email address or click the Address book button to the right of the To field to select the account you wish to send the email. Please note that the email will automatically be related to the account record.




Users can also use Quick Compose by clicking an account's email address anywhere it is displayed as a link. Clicking the email address automatically populates the To field with the account's name and relates the email to the account record.




Once the email is sent successfully, the email record will appear in the History dashlet and Emails subpanel on the account's record view. For more information on sending emails via quick compose, please refer to the Emails documentation.

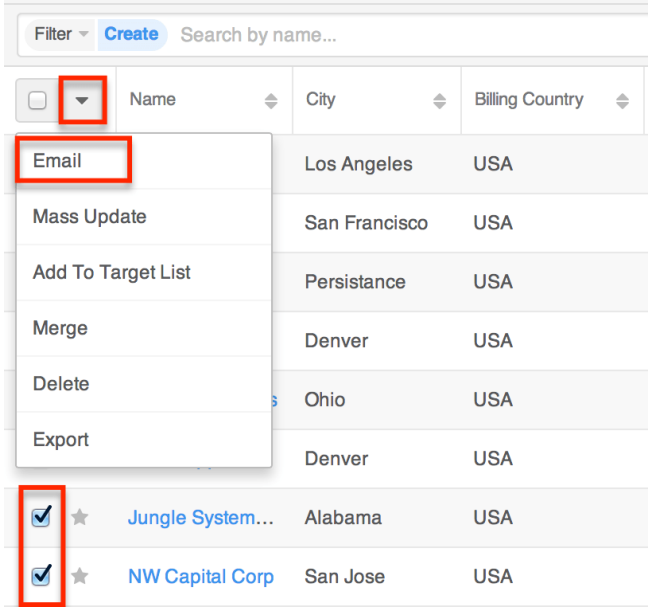



## Emailing Via Accounts List View

One or more accounts may be emailed at a time from the Accounts list view simply by selecting the Email option from the Actions menu.

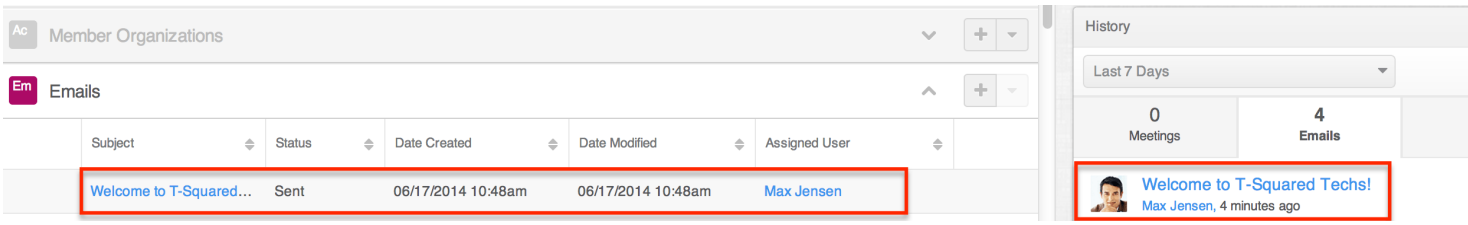
Use the following steps to compose and send an email from the Accounts list view:

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the Module Search to find the Account records you wish to include on the email.
3. Select the desired accounts then choose "Email" from the Actions menu.




4. In the Compose Email window, enter in the subject and body of the email message, then click "Send".
    - Note: The email's To field will automatically populate with the name of the selected account record(s).

Once the email is sent successfully, the email record will appear in the History dashlet and Emails subpanel of each account record.




## Emailing Via Campaigns

Sugar's Campaigns module can be used to create email and newsletter campaigns to send mass emails to a relevant set of accounts. Email-type campaigns are mass emails sent to a target list while newsletter-type campaigns are a series of mass emails sent to a consistent or growing target list periodically or on a regular basis. For more information on sending mass emails to accounts via a campaign, please refer to the Campaigns documentation.

## Emailing Via Workflows

Sugar's Workflow module enables you to automate tasks, send email alerts, and execute various actions. With each workflow, a set of conditions trigger a combination of actions and email alerts potentially including alerts to account records. You can also create alert email templates used by workflows to insert relevant data to the automated email notifications. For more information on workflow email notifications, please refer to the Email Alert section of the Workflows documentation.

# Adding Accounts to a Target List

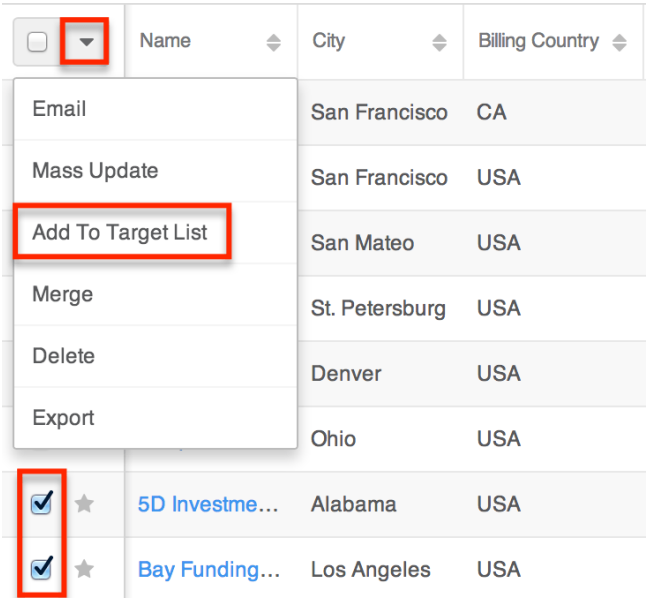
A target list consists of a group of individuals or organizations you wish to be included or excluded on a mass marketing campaign. These targets are typically identified based on a set of predetermined criteria such as being a prospect or existing customer, age group, industry, etc. There are various ways to add accounts to a target list in Sugar including using the Add to Target List option from the Account list view's Actions menu. For more information on target lists and other methods of adding accounts, please refer to the Target Lists documentation.

You can use the Select All feature in the list view when adding to a target list, which will allow you to easily select the first 1000 records in the result set. If you wish to add more than 1000 records or add a specific group of records to the target list, please use the filter option in module search to perform the additions in smaller batches.

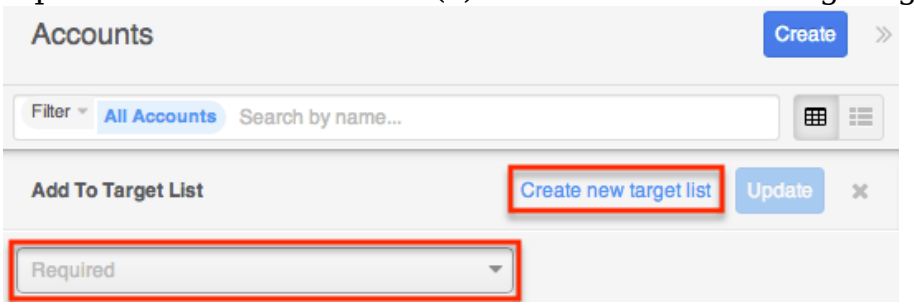
The following steps cover adding account records to a target list via the Accounts

list view as an example:

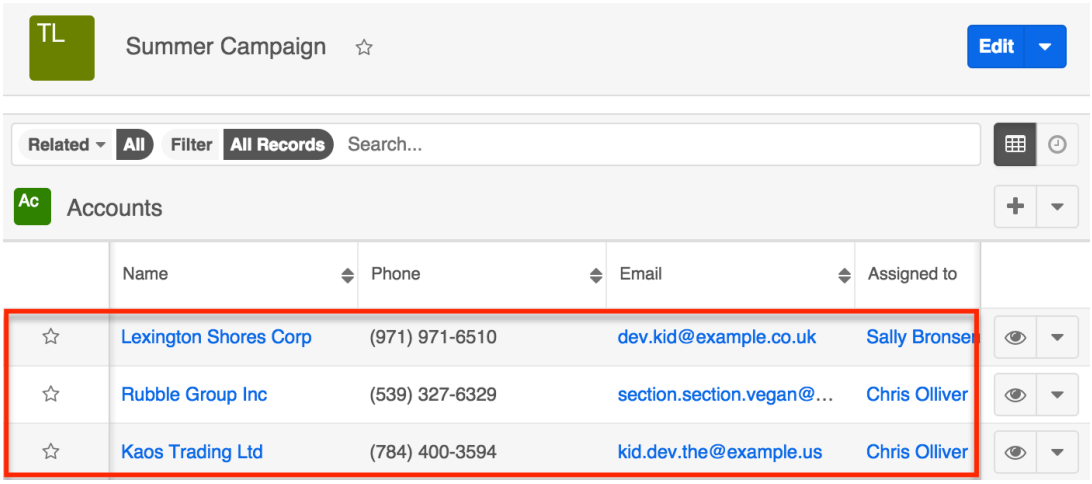
1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the Module Search to find the Account records you wish to add to a target list.
3. Select the desired account records then choose "Add to Target List" from the Mass Actions menu.




4. Below the Accounts search bar, locate and select the desired target list in the dropdown list or click "Create Target List" to add to a new target list. Click "Update" to add the record(s) to the new or existing target list.




In order to view the accounts that have been added, you can navigate to the Target Lists module. Click the target list's name to enter the record view, and you will see the account records within the Accounts subpanel.

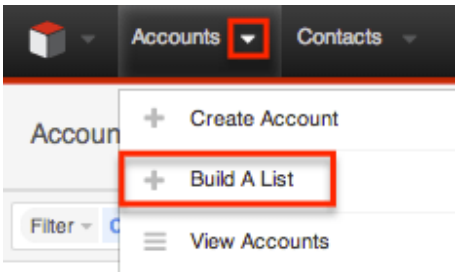



# D&B Connector

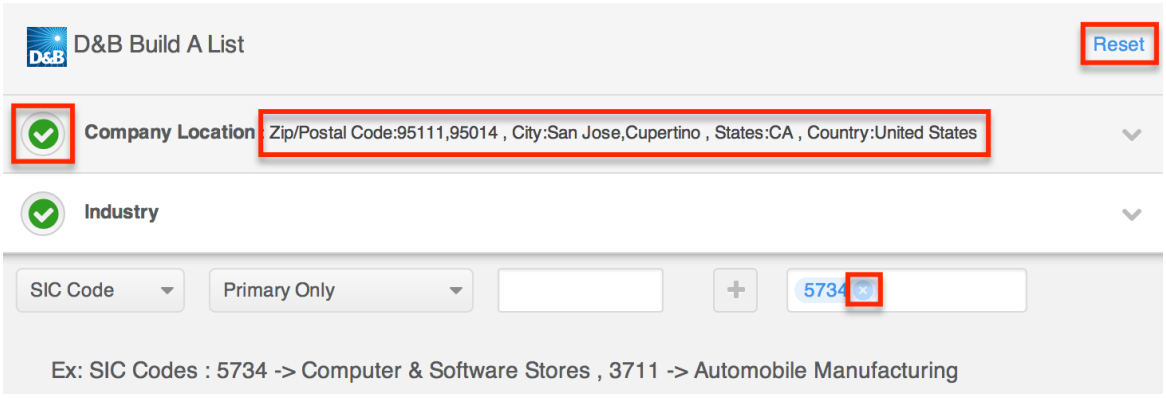
The D&B connector allows users to search, view, and import key information for new and existing accounts in Sugar. The data is pulled from an external application (D&B) and provides insight into the company's competitors, contacts, family tree, etc. via the D&B dashboard on the Account record view's intelligence pane. For more information on utilizing the various dashlets to view and import data into the account, please refer to the D&B Dashlets section of the Intelligence Pane documentation. Please note that administrators must first enable the D&B connector via Admin > Connectors in order to enable users to view, search, and import data via the dashlets. For more information on enabling connectors, please refer to the Enabling Connectors section of the System documentation in the Administration guide.

## Build A List

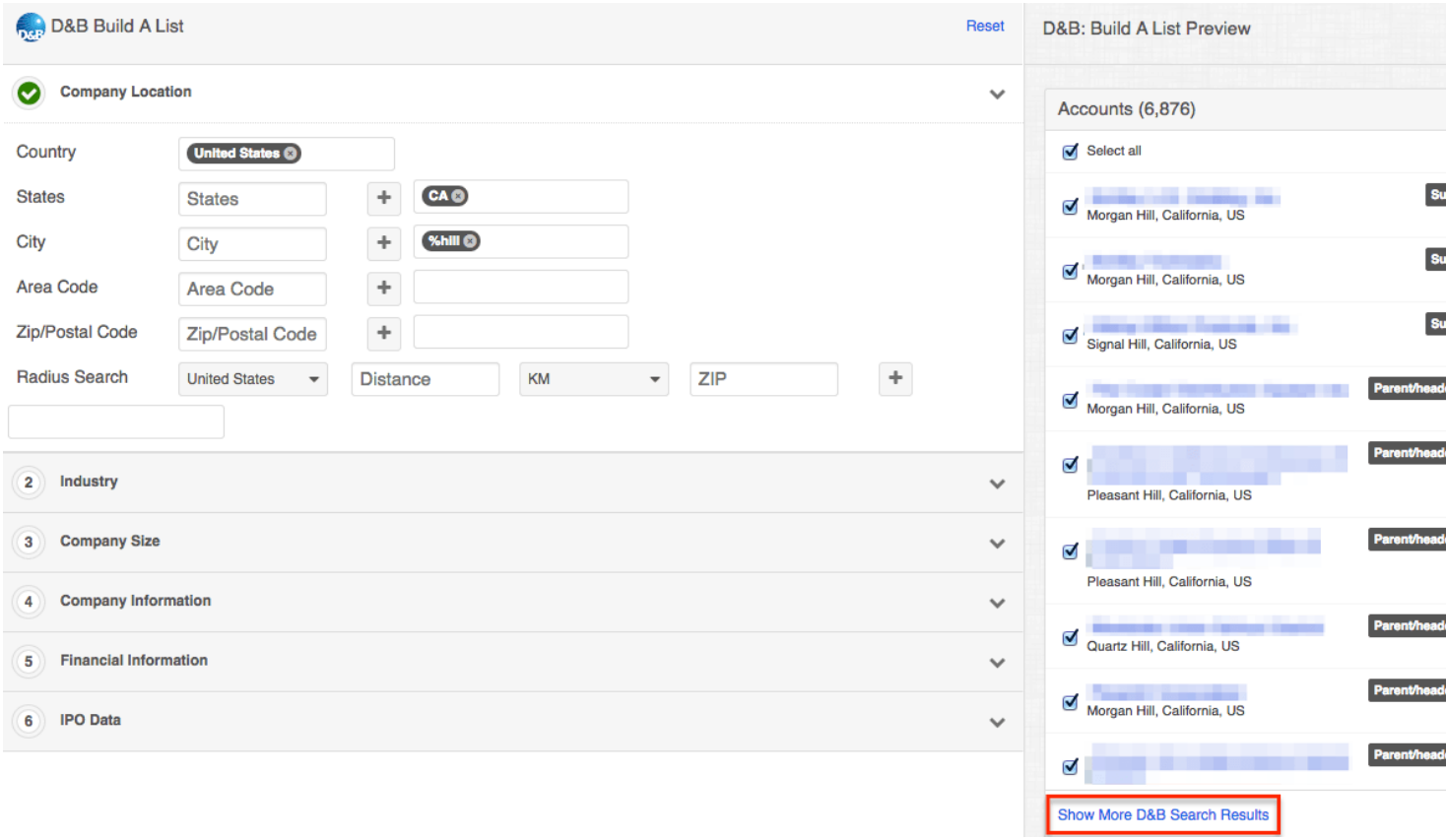
D&B's Build A List option allows you to create a list of companies for import based on various search filter criteria (e.g. company location, size, industry, etc.). The companies meeting your search criteria will be pulled from the D&B database and displayed in the intelligence pane to the right of the page. You can easily import and save any of the companies in the list to Sugar by selecting the company's name. To build your list of companies, simply click the triangle in the Accounts module tab and select "Build A List". Please note that administrators must configure the D&B connector via Admin > Connectors before users can utilize the Build A List page to create filters, view, and import data into Sugar. For more information on enabling connectors, please refer to the Enabling Connectors section of the System documentation in the Administration guide.



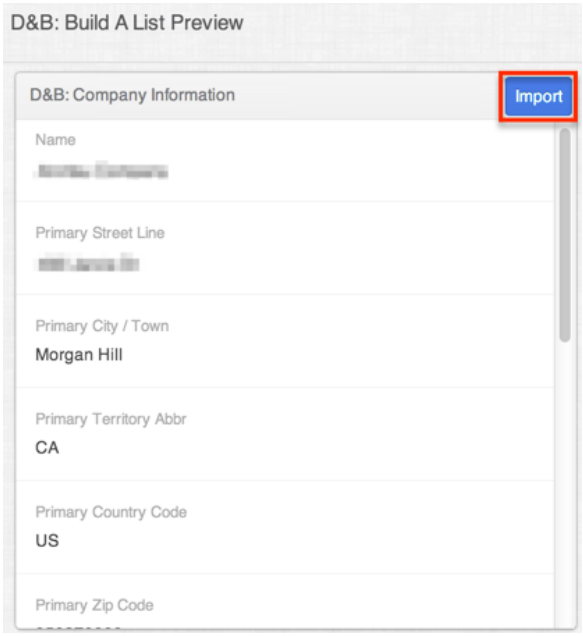

The D&B Build A List page will open displaying the various panels (e.g. Company Location, Industry, Company Size, etc.) available to create your filter criteria. Once you enter in at least one filter criteria in the corresponding panels, the panel will display a check mark to the left of the header. The panel you are currently viewing (e.g. Company Location) will collapse as you open up a different panel (e.g. Industry) on the page. Each collapsed panel will display a summary of filters (if applicable) created for the search. You can remove any unnecessary filter values by clicking the "x" to the right of the specific value or clicking "Reset" on the upper right of the page to clear all filters.




The D&B: Build A List Preview dashboard to the right of the page will display search results in real time as you enter in the various search filter criteria. Only companies meeting all of the search criteria across all panels on the D&B Build A List page will be included in the search results. Please note that you can use the wildcard character (% or *) at the beginning or end of your text when entering in your filter criteria to broaden the search if you wish. The first ten matching companies will display in the Accounts dashlet, and you can click "Show More D&B Search Results" at the bottom of the dashlet to display the other companies.



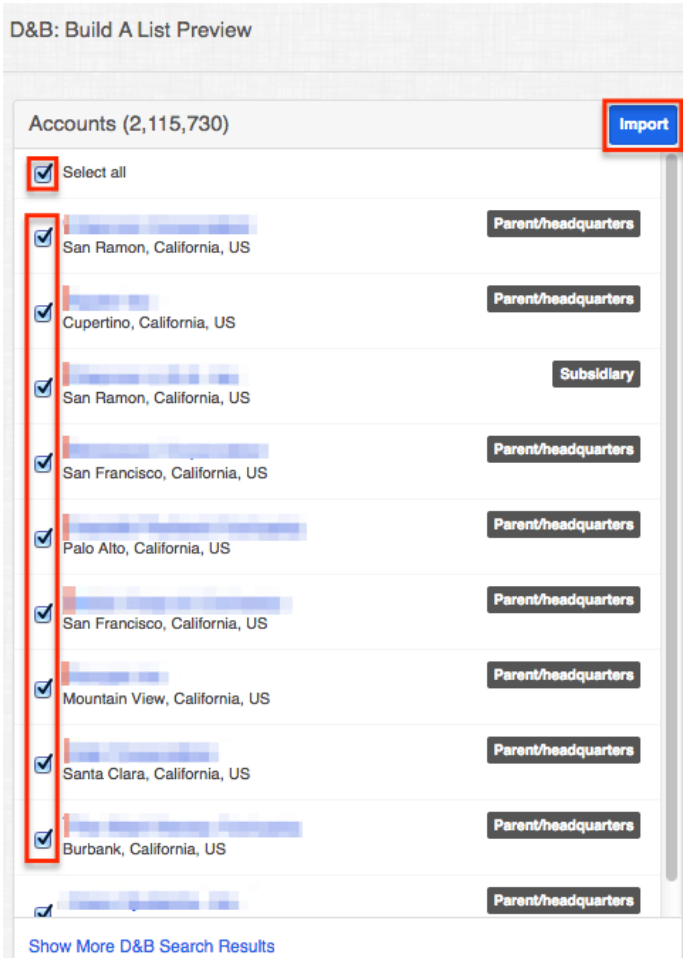

To import a company, simply select the appropriate company name in the Accounts dashlet and the company's key information (e.g. name, phone, address, etc.) will display in the D&B: Company Information dashlet. To return back to the previous search results, simply click "Back To D&B Build A List Results" at the bottom of the D&B: Company Information dashlet. To import the company data into Sugar, click the Import button on the upper right of the D&B: Company Information dashlet. The company's data will appear in the corresponding Sugar fields in the account's record view. In addition, the DUNS number associated to the company in D&B will be populated automatically in the DUNS field of the account's record view. The DUNS number is a unique identifier in D&B and is used to pull associated information (e.g. contacts, competitors, etc.) specific to the company from the D&B database. For more information on how the DUNS number is used to pull data from D&B, please refer to the to the D&B Dashlets section of the Intelligence Pane documentation.




Please note that if the selected company is detected as a duplicate of an existing Sugar account, the duplicate record(s) will appear within the record view upon save, but you can click "Ignore Duplicate and Save" if you wish to proceed with creating the record. You can also choose to view and edit the duplicate record's details by clicking "Select and edit" in the panel. Once the company is imported to Sugar, you will be taken back to the Build A List page where your search filter criteria are still preserved and you can select other companies to import from the results list.

You can also import multiple companies into Sugar at once by selecting the desired companies using the checkbox in the results list, then clicking "Import" on the upper right of the dashlet. To select a set of companies at one time on the current search results list, mark the "Select all" checkbox beneath the dashlet header. Please note that a maximum of twenty companies can be selected and imported at once. Companies that are detected as duplicates of existing Sugar accounts will be marked as "Duplicate" in red and will not be selected. If you wish to clear all selections on the results list, simply uncheck the "Select all" box. Click the Import button once you have selected the desired companies. Once the import has completed successfully, you will see a success message with the number of accounts that have been created. You can click the View Accounts link in the success message to view the Accounts list view. If records are not imported due to an error, a failure message will appear on the screen. Any companies detected as a duplicate of an existing Sugar account will not be imported.

Note: Only the company name and DUNS number will be imported into Sugar when performing a bulk import. To import additional company data (e.g. address, phone, etc.), please import the companies one-at-a-time.

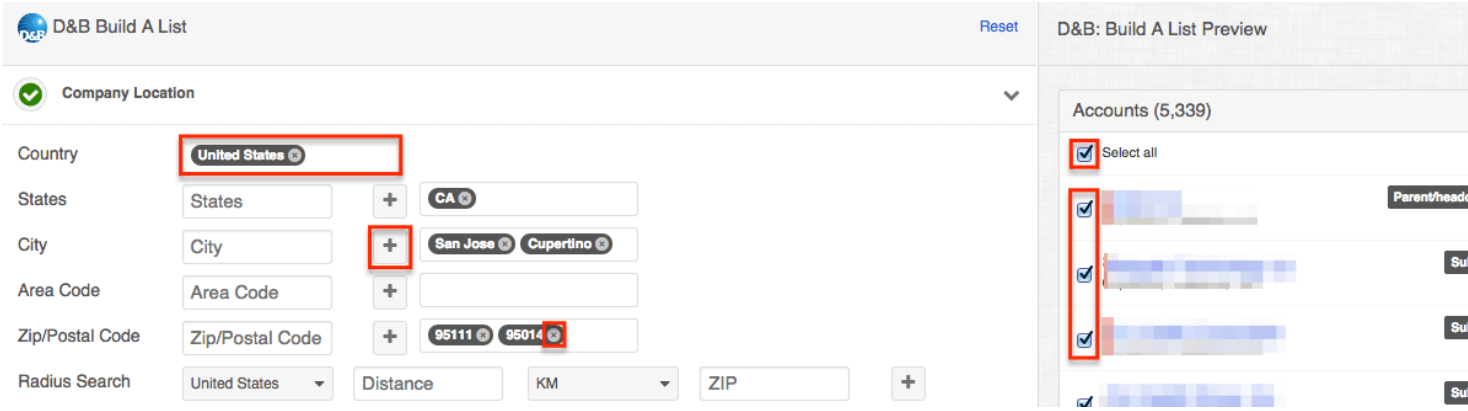



Company Location Filter Panel

By default, the Company Location panel is open at the top of the page, and you can enter the country, state, city, area code, etc. to pull up companies meeting the specific location criteria. You can either select a value from the dropdown list (e.g. Country) or enter in a value in the open text box (e.g. City) to add the filter to your search. For example, you can select a country from the dropdown list by clicking in the open text box or begin typing in a keyword then select the matching value in the list. You can add more than one value to this field by clicking in the box again to pull up the dropdown list or entering in a value then selecting from the list.

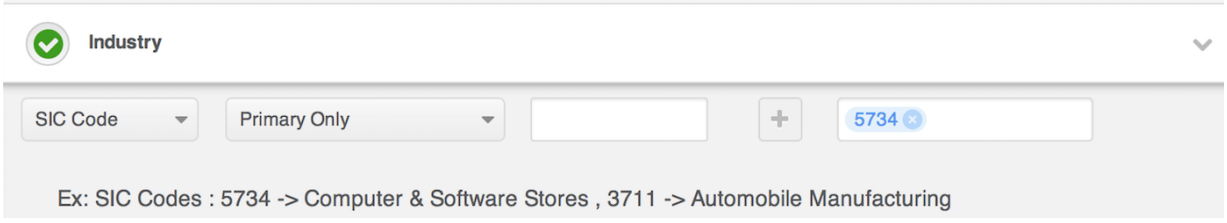
When entering in a value for the City field, you must click the Plus icon to the right of the open text box in order to have the filter applied to your search. You also have the option to add multiple values to the same filter criteria by entering the new value and clicking the Plus icon to add it to the list. You can also define a Radius Search criteria for either United States or Canada based on a specific distance from a certain zip code. Please note that the D&B: Build A List Preview dashboard will display the search results in real time as you enter in your search criteria.

You have the ability to remove any unnecessary filter values by clicking the "x" to the right of the value. If you have the specific list of companies you wish to import into Sugar based on the company's location, you can simply select the appropriate company name (e.g. SugarCRM) in the search results list and the company's key information (e.g. name, phone, address, etc.) will display in the D&B: Company Information dashlet. To import the company data into Sugar, click the Import button on the upper right of the dashlet. You can also import multiple companies into Sugar at once by selecting the desired companies' checkboxes then clicking the Import button on the upper right of the dashlet. To select a set of companies on the current search results list, mark the "Select all" checkbox beneath the dashlet header. A maximum of twenty companies can be imported at once. Please note that only the company name and DUNS number will be imported into Sugar when performing a bulk import. For more information regarding bulk import, please refer to the Build A List section of this documentation. If you wish to apply additional filter criteria, please proceed to the other panels (e.g. Industry, Company Size, etc.) on the page.



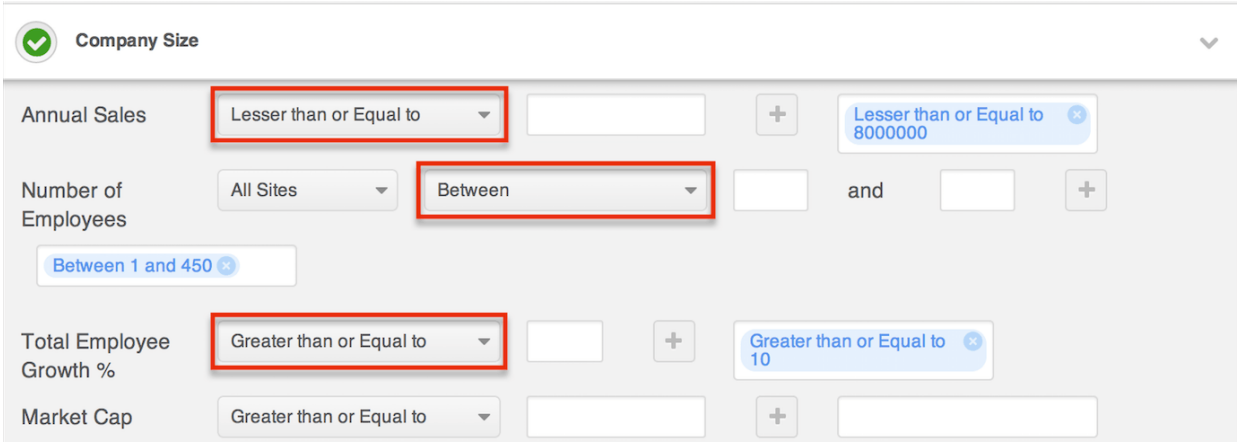

Industry Filter Panel

The Industry panel allows you to create a filter based on the NAICS Code or SIC Code of the company. You can select either "Primary Only" or "Primary and Secondary" as the corresponding condition from the dropdown list to the right. In the open text box, enter the appropriate SIC or NAICS code. Once you enter in the appropriate code (e.g. 5734), click the Plus icon to apply this specific code to your D&B search. The D&B: Build A List Preview dashboard will re-build the results list to display the companies that meet all of the filter criteria entered on the page.



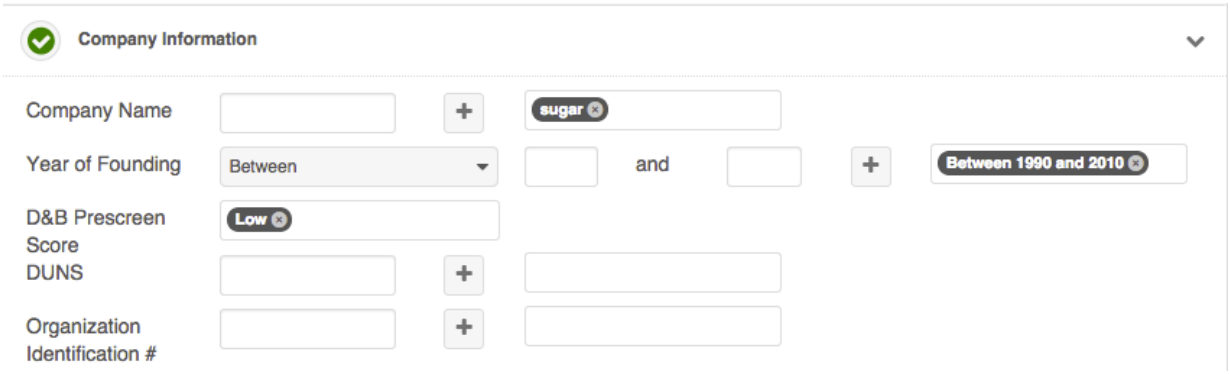
## Company Size Filter Panel

The Company Size panel provides filter options for annual sales, number of employees, total employee growth percentage, and market cap. You have the ability to enter a range for values by selecting the Between option from the condition's dropdown list. The other conditions available to select are "Greater than or Equal to" and "Lesser than or Equal to". Click the Plus icon to add the values to the filter list to be applied to your Build A List search.



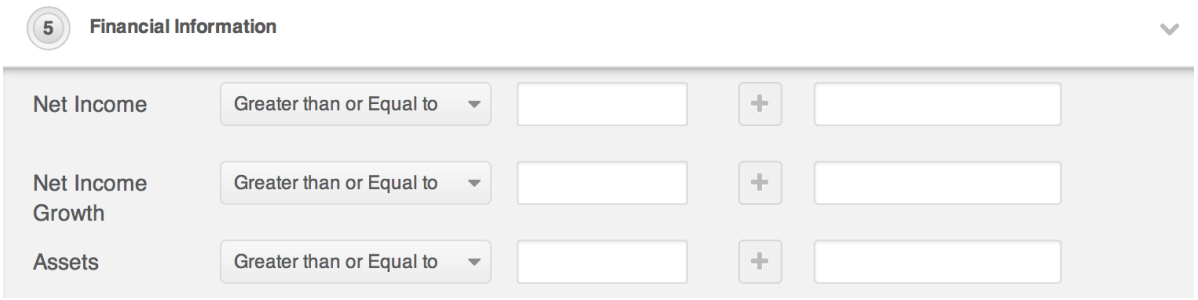

## Company Information Filter Panel

The Company Information panel enables you to filter based on the company's name, year of founding, D&B prescreen score, DUNS number, and organization identification number. To filter your search based on company name, simply enter in the keyword then click the Plus icon to add the filter criteria. Please note that only one company name can be included in the filter. You can choose to enter in a range for the year of founding if you wish by selecting the Between condition. You can also filter based on the organization's associated credit risk level by selecting "Low", "Medium", or "High" in the D&B Prescreen Score field. The specific 9-digit DUNS number for the company(s) can be entered in the DUNS field if you have that information. For more information regarding the DUNS number, please refer to the D&B Dashlets section of the Intelligence Pane documentation. If you have a specific organization identification number you wish to filter the search by, please enter the value as well.



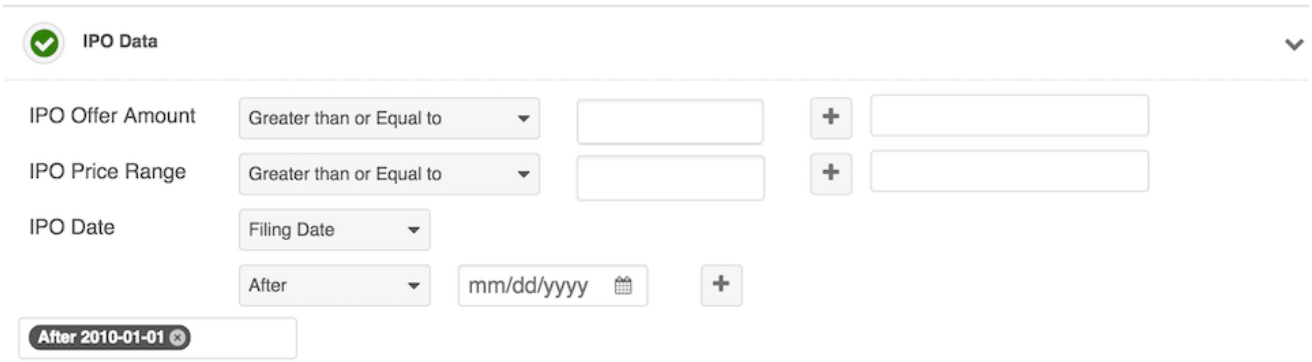

Financial Information Filter Panel

The Financial Information panel allows you to narrow your search further by specifying the company's net income, net income growth, or asset values you wish to include in the filter. The conditions available to choose are "Greater than or Equal to", "Lesser than or Equal to", and "Between".




IPO Data Filter Panel

The IPO Data panel includes the IPO Offer Amount and IPO Price Range filter options where you can enter the appropriate offering amount or price range of each share offered for the company. The conditions available to choose are "Greater than or Equal to", "Between", etc. In addition, you can filter based on the IPO date (Filing Date, Trading Date) by selecting the condition (e.g. After), choosing the date, then clicking the Plus icon.




Last Modified: 12/21/2015 06:04pm

# Revenue Line Items

## Overview

Sugar's Revenue Line Items module consists of individual line items of business which are included on an opportunity record and tracked through the sales lifecycle. In Sugar Enterprise and Ultimate, the opportunity record acts as a header for one or more revenue line item records. This allows for greater granularity when working opportunities and forecasting since each line item within an opportunity can have it's own sales stage and probability as well as being included or excluded from a user's forecasting worksheet individually.

Each revenue line item may be related to a product from your organization's Product Catalog. Doing so will cause the product's values to automatically populate matching fields on the revenue line item. For more information about the Product Catalog, please refer to the Products and Quotes documentation in the Administration guide.

There are various ways you can create revenue line items in Sugar such as via the Opportunities module, Revenue Line Items module, duplication, import, etc. This documentation will cover how to use the Revenue Line Items module as well as the various actions and options available from within the module.

Note: If your instance is configured to use opportunities alone without revenue line items, please refer to the Opportunities documentation in the Professional Edition Application Guide. For more information about changing your opportunities model via Admin > Opportunities, please see the Opportunities Configuration documentation in the Administration Guide.

## Revenue Line Item Fields

The Revenue Line Items module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

| Field | Description |
| --- | --- |
| Account Name | The account to which the related opportunity belongs<br><br>Note: This value is automatically populated based on the selected opportunity's related account and may not be manually modified. |
| Assigned To | The Sugar user assigned to the revenue line item |
| Associated Quote | The quote that was generated based on this revenue line item<br><br>Note: Each revenue line item may only be included on a single quote which may only be generated once. |
| Best | The most optimistic amount that may be won for the revenue line item displayed in either a) the system default currency when the user's Show Preferred Currency option is disabled or b) the user's preferred currency when their Show Preferred Currency option is enabled<br><br>When the line item's currency differs from the displayed currency as described above, a dark grey box will also appear with the Best amount in the transactional currency. For more information, please refer to Updating Currency Rates.<br><br>Note: The revenue line item's Best value will roll up into the parent opportunity |

| | |
|---|---|
| | unless the sales stage is set to "Closed Lost". |
| Calculated Revenue Line Item Amount | The amount calculated from the unit price, quantity, and discount which serves as a guide for determining the Likely, Best, and Worst values.<br><br>Note: The value is populated based on the unit price, quantity, and discount amount and may not be manually modified |
| Campaign | The campaign, if any, from which the revenue line item opportunity originated |
| Category | The category to which the revenue line item's product belongs<br><br>Note: The default value is populated with the Parent value of a selected product and may be modified manually. For more information on creating product categories, please refer to the documentation in the Administration Guide. |
| Cost | The actual cost of the revenue line item's product displayed in either a) the system default currency when the user's Show Preferred Currency option is disabled or b) the user's preferred currency when their Show Preferred Currency option is enabled<br><br>When the opportunity's currency differs from the displayed currency as described above, a dark grey box will also appear with the Cost in the transactional currency. For more information, please refer to Updating Currency Rates.<br><br>Note: The value is automatically populated based on the selected product and may not be modified manually |
| Date Created | The date the revenue line item record was created |

| | |
|---|---|
| Date Modified | The date the revenue line item record was last modified |
| Description | A description or other information about the revenue line item |
| Expected Close Date | The date when the revenue line item is expected to close or already has closed |
| Forecast | The revenue line item's commit range for forecasting (e.g. "Include", "Exclude", etc.)<br><br>Note: The available values are determined by the Ranges configuration in Admin > Forecasts. For more information on configuring forecasting ranges, please refer to the Forecasts documentation in the Administration Guide. |
| Lead Source | The source (e.g. Trade Show) from which the revenue line item opportunity originated |
| Likely | The most likely amount that may be won for the revenue line item displayed in either a) the system default currency when the user's Show Preferred Currency option is disabled or b) the user's preferred currency when their Show Preferred Currency option is enabled<br><br>When the opportunity's currency differs from the displayed currency as described above, a dark grey box will also appear with the Best amount in the transactional currency. For more information, please refer to Updating Currency Rates.<br><br>Note: The revenue line item's Likely value will roll up into the parent opportunity unless the sales stage is set to "Closed Lost". |
| List Price | The list price of the revenue line item's selected product |

| | |
|---|---|
| | Note: The value is automatically populated based on the selected product and may not be modified manually |
| Mft Part Number | The manufacturer's part number for the revenue line item's product, if any, selected from the Product Catalog |
| Modified by Name | The Sugar user who last modified the revenue line item record |
| Next Step | The succeeding stage of the revenue line item's sales cycle |
| Opportunity Name | The opportunity to which the revenue line item belongs |
| Probability (%) | The revenue line item's current likelihood of being won<br><br>Note: This value is calculated based on the selected Sales Stage and cannot be edited. |
| Product | The product's name as selected from the product catalog list or manually entered as new<br><br>Note: For more information on creating and managing the product catalog, please refer to the Products and Quotes |
| Quantity | The number of products being purchased |
| Sales Stage | The revenue line item's current state in the sales process (e.g. Prospecting, Qualification, etc.)<br><br>Note: When the revenue line item's sales stage is set to "Closed Lost", the values (e.g. Likely, Best, etc.) associated with the revenue line item no longer roll up into the parent opportunity. |
| Tax Class | Tax classification (e.g. taxable, non-taxable) for the revenue line item's product, if any, selected from the Product Catalog<br><br>Note: When a product is selected, the |

| | |
|---|---|
| | value is automatically populated based on the value defined in the Product Catalog and may not be modified manually |
| Teams | The Sugar team(s) assigned to the revenue line item record |
| Total Discount Amount | The amount of the discount provided for the revenue line item |
| Type | The type of the revenue line item's business (e.g. New Business or Old Business) |
| Unit Price | The unit price of the revenue line item's product displayed in either a) the system default currency when the user's Show Preferred Currency option is disabled or b) the user's preferred currency when their Show Preferred Currency option is enabled<br><br>When the opportunity's currency differs from the displayed currency as described above, a dark grey box will also appear with the Best amount in the transactional currency. For more information, please refer to Updating Currency Rates.<br><br>Note: The default value is automatically generated based on the formula defined in the Product Catalog and may not be modified manually |
| Weight | The weight of the product, if any, selected from the Product Catalog |
| Worst | The least optimistic amount that may be won for the revenue line item displayed in either a) the system default currency when the user's Show Preferred Currency option is disabled or b) the user's preferred currency when their Show Preferred Currency option is enabled<br><br>When the opportunity's currency differs from the displayed currency as |

| | |
|---|---|
| | described above, a dark grey box will also appear with the Worst amount in the transactional currency. For more information, please refer to Updating Currency Rates.<br><br>Note: The revenue line item's Worst value will roll up into the parent opportunity unless the sales stage is set to "Closed Lost". |

## Sales Stages

A sales stage identifies the current stage (e.g. Prospecting, Qualification, etc.) that the revenue line item is in during the sales cycle. When you select a sales stage in the revenue line item record, the system automatically populates the corresponding probability value (e.g. 10, 20, etc.) in the Probability (%) field. These probability values are a useful tool as it helps calculate and predict your sales forecast for a specified time period. For more information on the Forecasts module, please refer to the Forecasts documentation. Administrators have the ability to configure the sales stage and probability values for each sales stage via Admin > Dropdown Editor. For more information on configuring the sales stages and probability values, please refer to the Developer Tools documentation in the Administration guide.

Please note that the below values are only guidelines for defining your sales stage and you can skip one or more stages based on your organization's needs.

| Sales Stage Value | Probability (%) | Description |
|---|---|---|
| Prospecting | 10 | Sales representative is reviewing and qualifying the revenue line item<br><br>Note: This is the first stage of the sales process, which indicates that the revenue line item with this prospect is new. |
| Qualification | 20 | Sales representative is interacting with the prospect to determine if a sales opportunity exists |
| Needs Analysis | 25 | Sales representative |

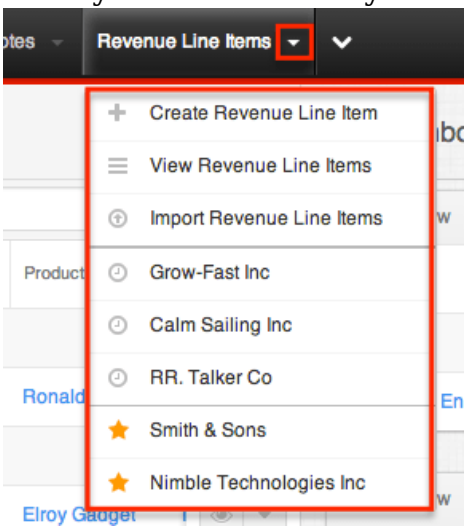
| | | |
|---|---|---|
| | | understands that the prospect is interested in the product(s)/service(s) and is identifying the prospect's business problems |
| Value Proposition | 30 | Sales representative is mapping the company's products and/or services to the prospect's business problems and describes the value of the solution |
| Id. Decision Makers | 40 | Sales representative identifies the decision makers necessary to close this revenue line item after determining there is a match between the prospect's business problems and the company's products and/or services |
| Perception Analysis | 50 | Sales representative is analyzing 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 | 65 | Sales representative is delivering the proposal (i.e. price quote) to the prospect |
| Negotiation/Review | 80 | Sales representative is reviewing and negotiating the proposal with the prospect |
| Closed Won | 100 | Sales representative has won this revenue line item and the client can be billed |
| Closed Lost | 0 | Sales representative has |

| | | |
|---|---|---|
| | | lost this revenue line item |

## Revenue Line Items Module Tab

The Revenue Line Items module tab is typically located under the More tab of the navigation bar at the top of any Sugar screen. Sugar normally displays the top six modules shown in the Display Modules list of your user preferences with the remaining displayed modules grouped under the More tab. For more information on displayed modules for the navigation bar, please refer to the Layout Options section of the Getting Started documentation.

Click the tab to access the Revenue Line Items list view. You may also click the triangle in the Revenue Line Items tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of revenue line items you last viewed in the module. The Favorites menu displays the list of revenue line items you most recently marked as favorites in the module.




The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|---|---|
| Create Revenue Line Item | Opens the edit view layout to create a new revenue line item |
| View Revenue Line Items | Opens the list view layout to search and display revenue line items |
| Import Revenue Line Items | Opens the import wizard to create or update revenue line items using external data |

If you do not see the Revenue Line Items module tab in Sugar, please check the following:

- The Revenue Line Items module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Revenue Line Items module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Revenue Line Items module for your entire Sugar instance. Reach out to your Sugar administrator to have the Revenue Line Items module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

## Creating Revenue Line Items

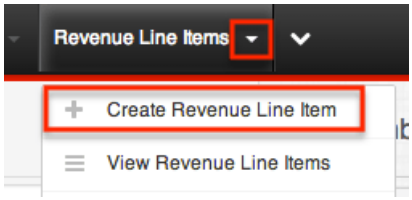
There are various methods for creating revenue line items in Sugar including via the Revenue Line Items module, Opportunities module, quick create, duplication, and import. The full edit view layout opens when creating the record directly from the Revenue Line Items menu and includes all of the relevant fields for your organization. Please note that administrators have the ability to create and manage items from the product catalog, product category, product type, and manufacturer list via Admin > Products and Quotes. For more information on how to create and manage these product fields, please refer to the Products and Quotes documentation in the Administration guide. The quick create form is a shortened version of the revenue line items edit view and typically contains fewer fields. Both the Edit View and Quick Create layouts can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

### Creating Via Revenue Line Items Module

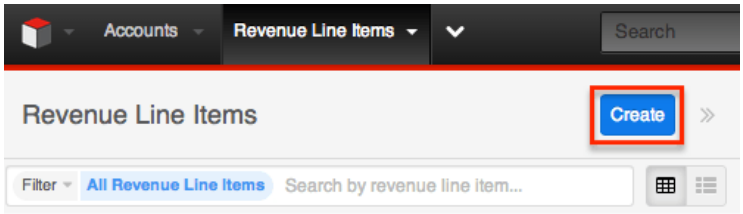
While the majority of revenue line items will be created from an opportunity record, you may also use the Create Revenue Line Items option in the module tab or the "Create" button on the Revenue Line Items list view to create directly from the module itself. This opens the record view layout in edit mode which allows you to enter in all of the relevant information.
Use the following steps to create a product via the Revenue Line Items module:

1. Click the triangle in the Accounts module tab to open the actions menu and select "Create Revenue Line Item". You can also click the Create button on the upper right of the Revenue Line Items list view.

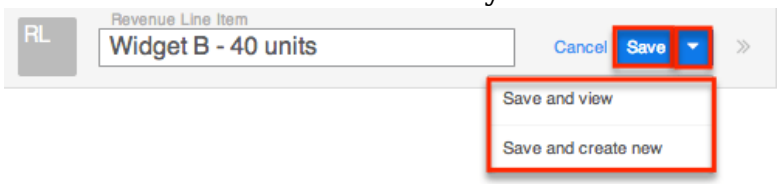
From Revenue Line Items tab:




From Revenue Line Items list view:




2. Enter appropriate values for the fields in the record view layout.All required fields will indicate "Required" in the field and must be completed prior to saving.
    - If you choose to select a product from the Product Catalog, several fields will be automatically populated to match the chosen product.
3. Once the necessary information is entered, click "Save".
    - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.

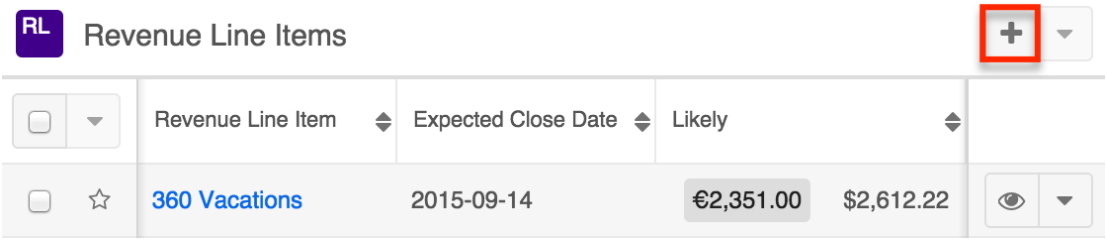



## Creating Via Opportunities Module

When creating an opportunity, the Revenue Line Items create subpanel will display below the opportunity's fields and allow both the opportunity and revenue line item(s) to be created simultaneously. Once the opportunity record is saved, the created revenue line item(s) will appear in the Revenue Line Items subpanel of the opportunity's record view, and users can create additional revenue line items via this subpanel as necessary. For more information on creating a revenue line item when creating an opportunity record, please refer to the Creating Via Opportunities Module section of the Opportunities documentation. Please note that every opportunity must have one or more related revenue line items.

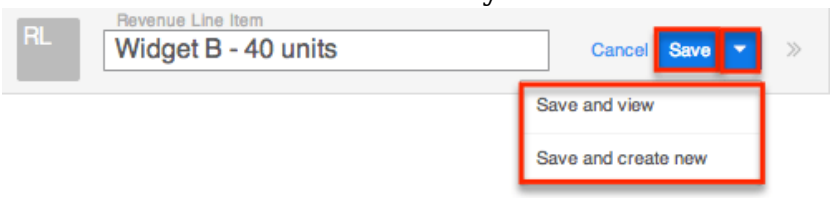
Use the following steps to create a revenue line item from an existing opportunity record:

1. Navigate to the opportunity in record view.
2. Scroll down to the Revenue Line Items subpanel.
3. Select "Create" from the Actions menu.




4. Enter appropriate values for the fields in the record view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.
    - If you choose to select a product from the Product Catalog, several fields will be automatically populated to match the chosen product.
5. Once the necessary information is entered, click "Save".

    - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.

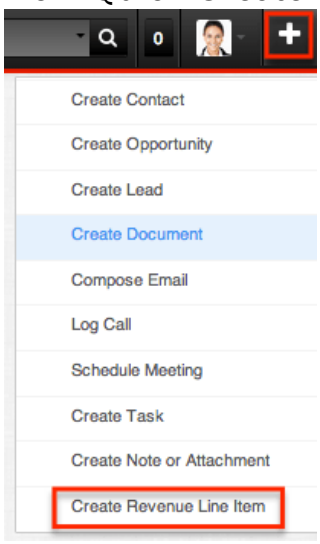
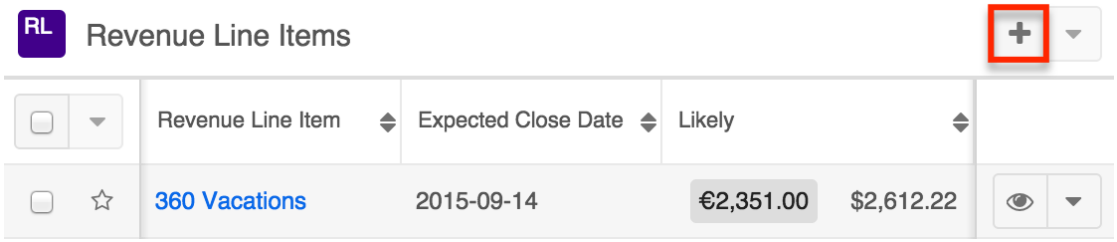


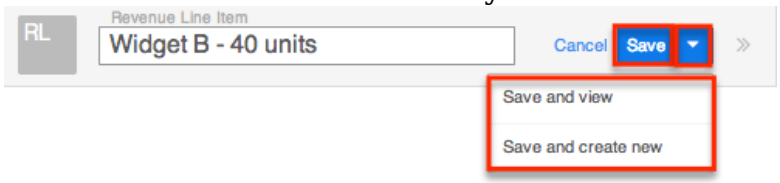

## Creating Via Quick Create

The Quick Create Menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of any Sugar page to access the menu. You can also quick create a revenue line item from any Revenue Line Items subpanel on related module records.

Please note that administrators have the ability to disable subpanels for the entire instance via Admin > Display Modules and Subpanels and to remove the Revenue Line Items module from the Quick Create Menu .Reach out to your Sugar administrator if Revenue Line Items are not displayed as subpanels or in the quick create menu. For more information, please refer to the Developer Tools documentation or the Configure Navigation Bar Quick Create documentation in the Administration guide.

Use the following steps to create a revenue line item via Quick Create:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Revenue Line Item" or click the Plus button on any Revenue Line Items subpanel on a related module's record view.
   From Quick Create menu:
   
   
   From subpanel:
   
   
2. Enter appropriate values in the fields in the quick create form. All required fields will indicate "Required" in the field and must be completed prior to saving.
3. Once the necessary information is entered, click "Save"
   - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.

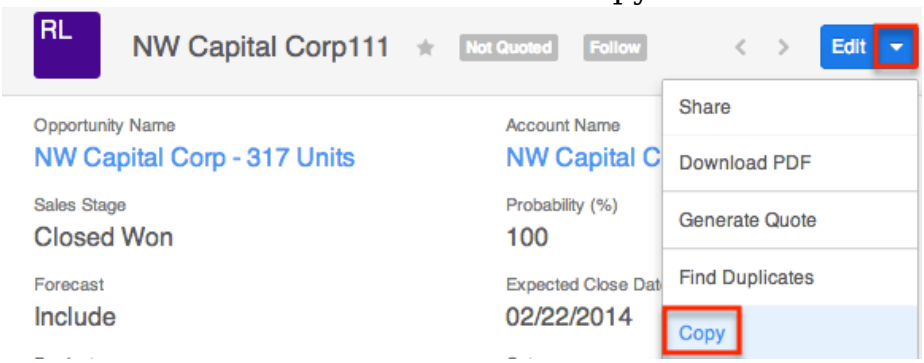
## Creating Via Duplication

You can also create a new revenue line item by duplicating an existing revenue line

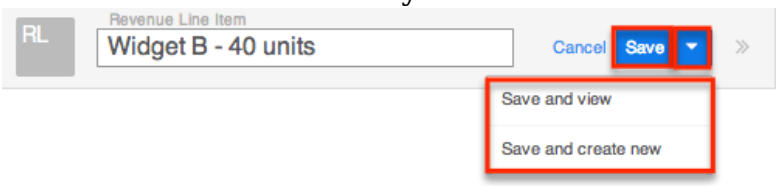
item record. The Copy option is useful if the revenue line item you are creating has similar information to an existing record.

Use the following steps to create a revenue line item by duplicating an existing record:

1. Navigate to a revenue line item record's record view.
2. Click the Actions menu and select "Copy".




3. The displayed record view view is pre-populated with the original revenue line item's values. Update the necessary fields, then click "Save".
    - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.

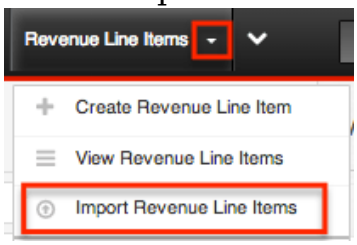



## Importing Revenue Line Items

The import function allows you to push multiple revenue line items records into Sugar using a comma (or other character) delimited file instead of creating them one-by-one. For more information on importing, please refer to the Import documentation. Please note that when an opportunity is imported into Sugar, a revenue line item must also be imported and related to the opportunity in order to populate the amounts (e.g. best, likely, etc.) on the opportunity record. Be sure to include the opportunity ID and amounts on the revenue line item import file.

Use the following steps to import revenue line items via the Import Revenue Line Items option:

1. Click the triangle to open the Actions menu in the Revenue Line Items tab and select "Import Revenue Line Items".




2. In Step 1, select the import file and choose "Create new records only". Click "Next".
3. In Step 2, confirm the import file properties. Click "Next".
4. In Step 3, confirm the field mappings for the import. Click "Next".
5. In Step 5, view the import results.
    - The Created Records tab will show all of the new revenue line items records.
    - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
    - The Errors tab will show records that were not imported due to errors detected during import.

## Viewing Revenue Line Items

There are various options available for viewing revenue line item records in Sugar including via Revenue Line Items list view, Revenue Line Items record view, Revenue Line Items Recently Viewed menu, and reports. Please note that you will only be able to see revenue line item records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

### Viewing Via List View

The Revenue Line Items list view displays all revenue line item records meeting the current search criteria. Users can also access the activity stream to view posts specific to the revenue line item record. For more information on viewing the activity stream, please refer to the Activity Stream section of this documentation. The Intelligence pane can also be viewed to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's forecasting or other data. For more information regarding the Intelligence Pane, please refer to the Intelligence Pane section of this documentation. To access the list view, simply click the Revenue Line Items module tab. While list view shows key revenue line item fields, you can click the record's name to open the it in record view. For more information on viewing revenue line items via list

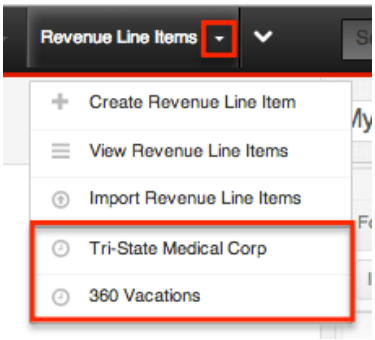
view, please refer to the Revenue Line Items List Viewsection of this documentation.

## Viewing Via Record View

The Revenue Line Items record view displays thorough revenue line item information including all relevant fields followed by subpanels of the revenue line item's related records belonging to various modules. Users can also access the activity stream to view posts specific to the revenue line item record. For more information on viewing the activity stream, please refer to the Activity Stream section of this documentation. The Intelligence pane can also be viewed to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's forecasting or other data. For more information regarding the Intelligence Pane, please refer to the Intelligence Pane section of this documentation. The record view can be reached by clicking a revenue line item record's link from anywhere in the application including from the Reveue Line Items list view. For more information on viewing revenue line items via the record view, please refer to the Revenue Line Items Record View section of this documentation.

## Viewing Via Recently Viewed

As you work, Sugar will keep track of which revenue line items you have recently viewed. Click the triangle on the right of the Revenue Line Items module tab to see a list of your most recently viewed revenue line items, and click each name to open the Revenue Line Items record view.



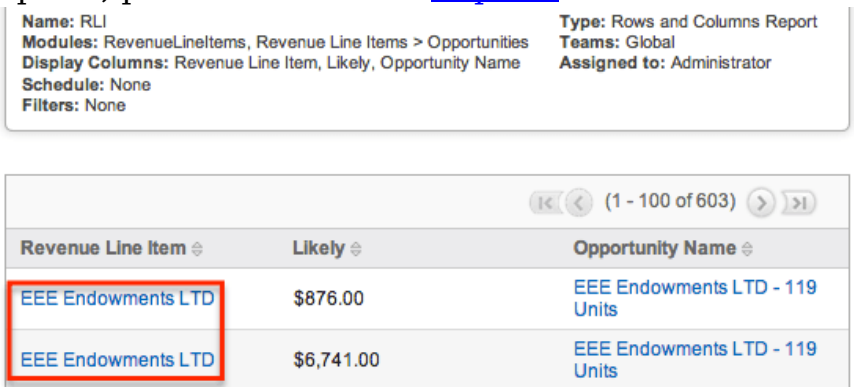

## Viewing Via Activity Streams

The activity stream allows users to view each other's activities in Sugar and the actions that took place for the various modules (e.g. Accounts, etc.) via posts (record post, user post, etc). You can access the Accounts record view by clicking the account's name referenced in the post. You can also preview the account record's detail directly from the activity stream by clicking the Preview button to

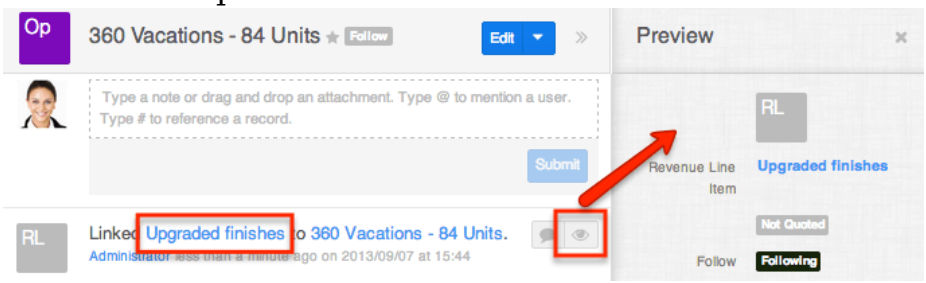
the right of the post. For more information on viewing records via the activity stream, please refer to the Activity Stream Documentation.

## Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding revenue line items and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the revenue line item record's record view by clicking the product's name in the report results. Please note that you can only directly access revenue line item record views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation.




Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.




# Searching Revenue Line Items

The Revenue Line Items list view includes a module search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Revenue Line Items list view below. Global Search allows users to search for information across their

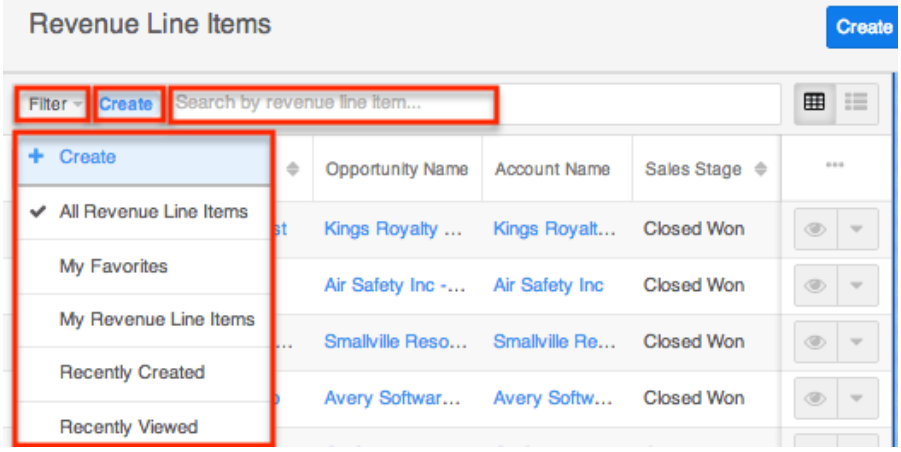
entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

## Module Search

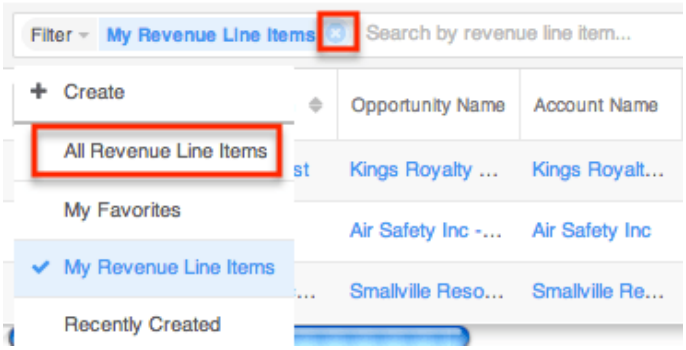
Module search enables users to easily search by revenue line item name within the module and pull up matching records in the list view. The search also provides a Filter option which can be used in combination with the open Search box to narrow your search further using the available options as follows:

- Create : Create a new custom filter which you can use to filter your search
  - Note: You can also click "Create" to the right of the Filter option.
- All Revenue Line Items : Returns all records in the module to which you have access
- My Favorites : Returns only records you have marked as favorites
- My Revenue Line Items : Returns only records assigned to you
- Recently Created : Returns only records you created in the module within the last 7 days
- Recently Viewed : Returns only records you have viewed in the module within the last 7 days




When you choose a filter, Sugar will return revenue line items which match both

the selected filter and any name provided in the "Search by revenue line item..." bar in the filtered list view results. For example, if you select "My Revenue Line Items" in the Filter options and enter a revenue line item name, Sugar will only return revenue line item records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search bar. To see all revenue line item records to which you have access, simply select the All Revenue Line Items option in the filter and clear any text from the search bar. You can also click the Clear icon within the selected filter option (e.g. My Revenue Line Items) in the Search bar to clear the filter and pull up all list view search results. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.




Please note that you will only be able to see revenue line item records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Administrators can configure what fields appear on the Revenue Line Items Module Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

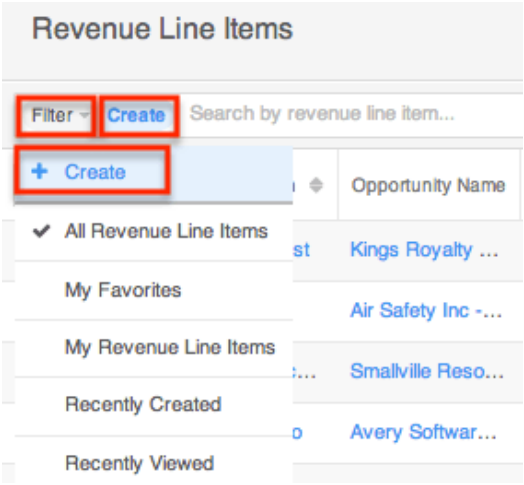
## Creating a Filter

Users can also create new filters via the Create Filter option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the Revenue Line Items list view. You have the option to add multiple fields to your new filter by clicking the Plus button to the right of the filter selection dropdown lists and set select operators along with their value(s). A filter's criteria need to be true for a record in order for it to appear in the list view search result. Additionally, filters with no specified values may be saved as a custom filter to act as a filter template when a user often searches using the same fields but with varying values. Please note that only fields you have view access for will appear in the Filter list when creating a search filter.

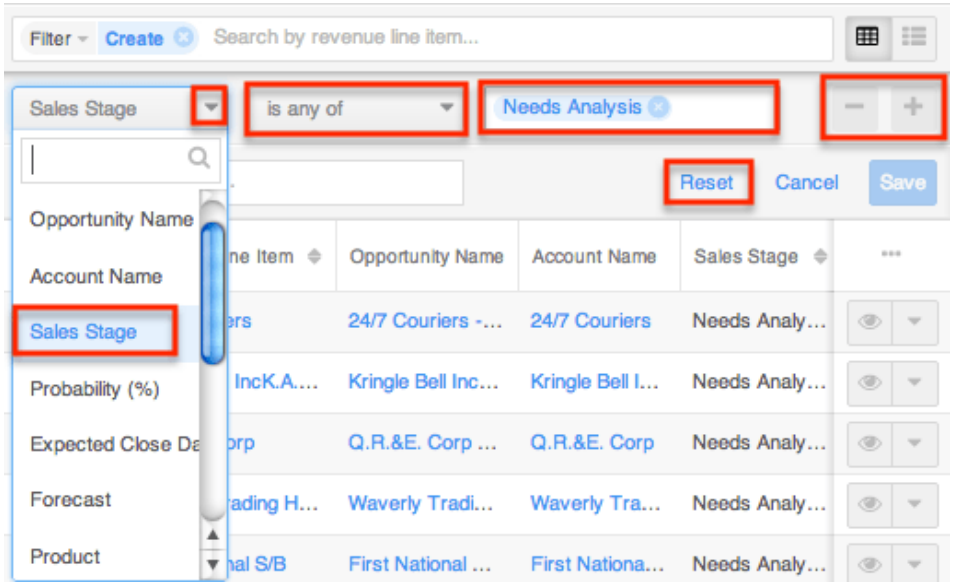
When you run a search using a created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.

The following steps cover creating a new Sales Stage filter as an example:

1. Click the Filter option on the Revenue Line Items search bar then select "Create".
    - You can also click "Create" to the right of the Filter option.




2. Select the field you wish to add to your filter as well as the condition and matching criteria.
    - Note: Only fields you have view access for will be available to add in the Filter list.
3. To add additional fields to the new filter, click the Plus button to the right of the filter.
    - To remove fields from the new filter, click the Minus button to the right of the filter.
    - To clear any filter values (e.g. Needs Analysis), simply click the "x" to the right of the value or select "Reset" to the left of the Save button.



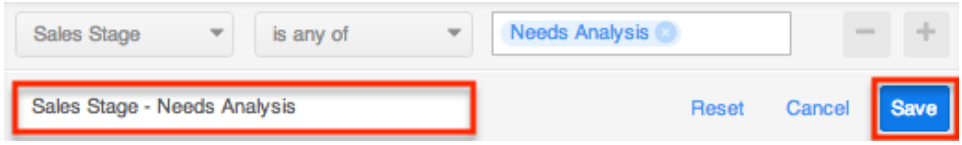

The list view will automatically display results matching your filters as you create and modify the criteria.

### Saving a Filter

Saving a filter will preserve the chosen fields as well as the condition(s) of the matching value(s). Additionally, it will allow users to easily select previously created and saved filters from the Filter options.

The following steps cover saving a new search by Name filter as an example:

1. Create a new filter to perform a search on your desired fields.
2. Enter in a name for the new filter (e.g. "Sales Stage - Needs Analysis").




3. Click "Save" to add this filter to the module's Filter options.

## Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search is used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text

string is entered in the search box.




To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

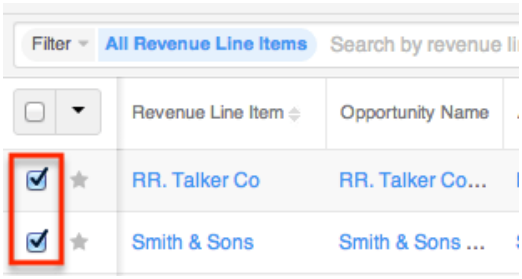
## Revenue Line Items List View

The Revenue Line Items list view displays all revenue line item records meeting the current search criteria to which your user has access. You can view the basic details of each record within the field columns. Please note that you will only be able to see revenue line item records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

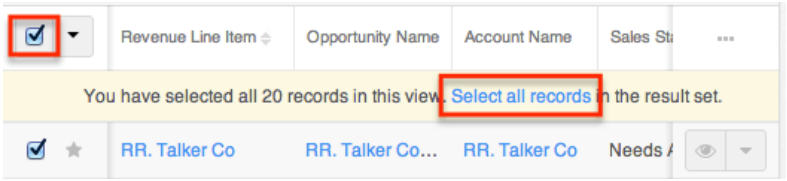
Users with administrator or developer access have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

### Checkbox Selection

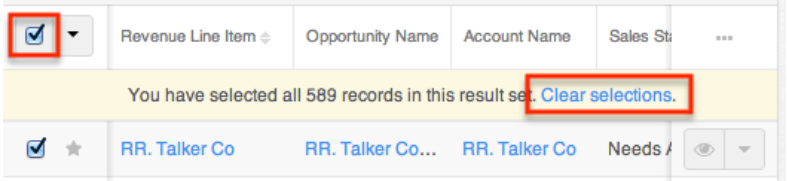
You can perform several actions on revenue line item records directly from the list view by first selecting the desired records. To select individual records on the Revenue Line Items list view, mark the checkbox on the left of each row.




To select all revenue line item records displayed on the current set of list view results, click the checkbox to the left of the Actions menu. A dialog will appear below the list view column headers indicating that you have selected all records on the list view's current results set (e.g. 20). To select all records matching the current search results set, click "Select all records" in the dialog.

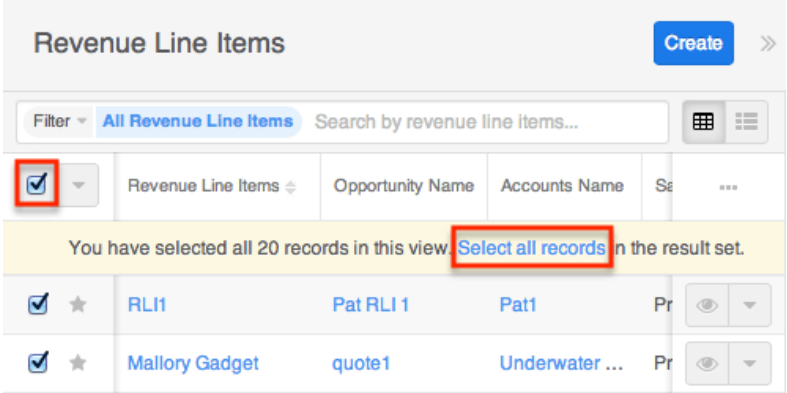



If you wish to clear the selection for all records on the list view result set, simply click "Clear selections" in the dialog. You can also clear the selections for all records by clicking the checkbox option again to remove the check marks.

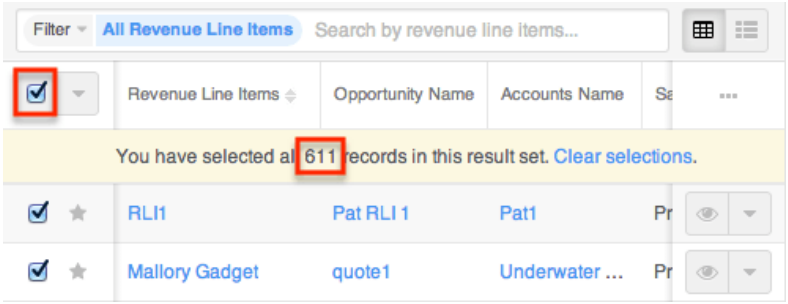



## Total Record Count

You can view the total record count on the Revenue Line Items list view by selecting all records displayed on the current set of list view results. Once the records are selected, a dialog will appear allowing you to select all records in the results set.

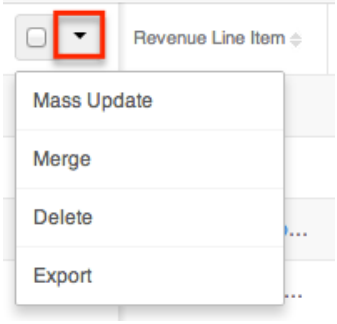


The total count of all records on the list view result set will appear in the dialog.




## Mass Actions Menu

The Mass Actions menu to the right of the checkbox option allows you to perform various actions on the currently selected records.

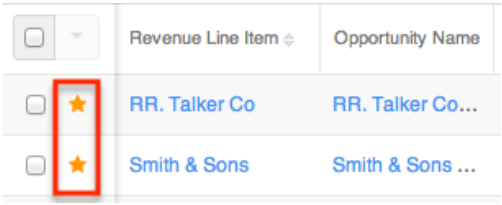



The options in the Mass Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Mass Update | Mass update one or more revenue line items at a time |
| Merge | Merge two or more duplicate revenue line items |
| Delete | Delete one or more revenue line items at a time |
| Export | Export one or more revenue line items to a CSV file |
| Recalculate Values | (Available in certain circumstances) Updates calculated values to reflect changes to calculated fields made in Studio |

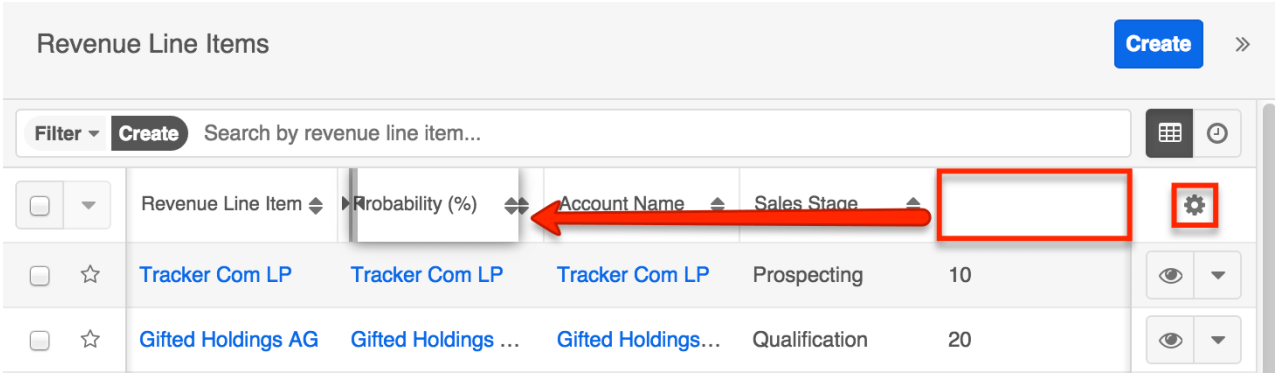
## Favorite Designation

Users have the option to mark revenue line item records as favorites via the list view as well as the record view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the Revenue Line Items module tab. In the Revenue Line Items list view, the star on the left of each record's row is orange once marked to indicate a favorite revenue line item. For more information on how to mark records as favorites, please refer to the Favoriting Revenue Line Items section of this documentation.




## Column Reordering

List view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the default column order.

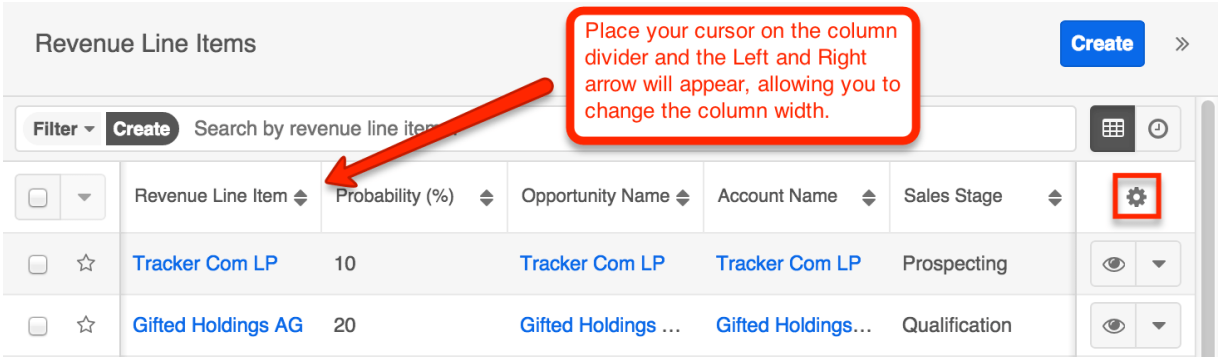



## Column Resizing

Users can easily adjust the size of columns in the Revenue Line Items list view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view

column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the current list view is different from the default column width. Changes to the column width made by administrators in Studio are only respected if the user has not resized the specific column in the list view. The column size set by the user will supersede the default column width configured in Studio until the user resets the list view back to the default widths. For more information on how admins can set column widths, please refer to the Studio documentation in the Administration guide.

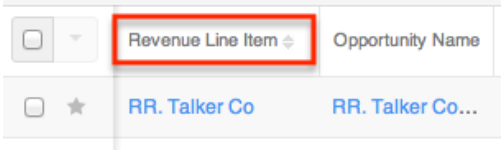
Note: Sugar enforces a minimum width for currency fields (e.g. Best, Likely, etc.) in list view columns which prevents the columns from being collapsed beyond this limit.




## Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows.

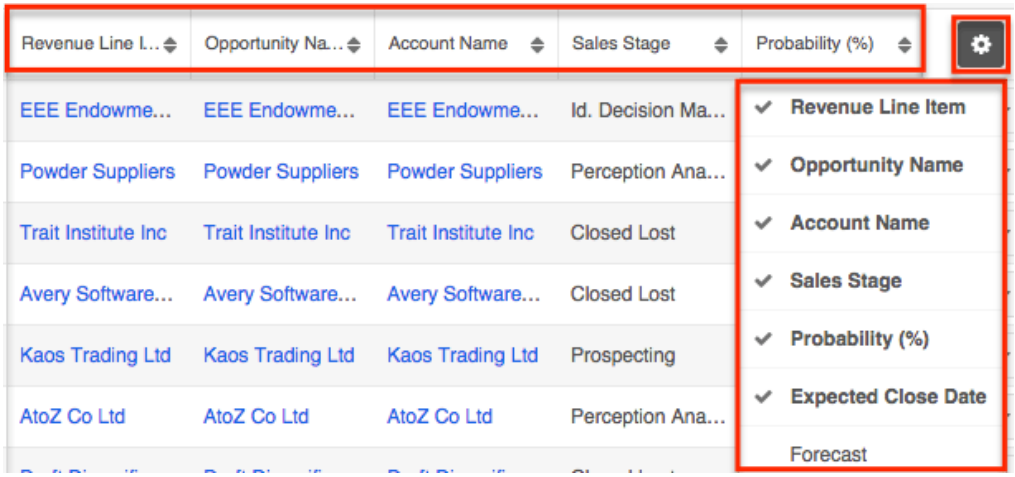
Note: List views may only be sorted by one column at a time and cannot be sorted by custom relate fields.




## Column Selection

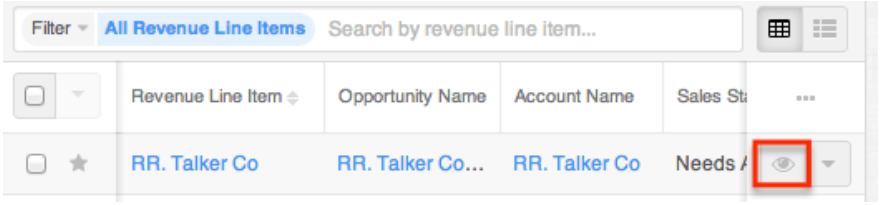
Sugar gives users the ability to personalize the list view by specifying which fields they want to be displayed in the list view. You can click the Column Selection icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column on your list view. Please note that administrators have the ability to configure what fields are available to display in the list view via Admin > Studio. For more information on

configuring fields to display in the list view, please refer to the Studio documentation in the Administration Guide.

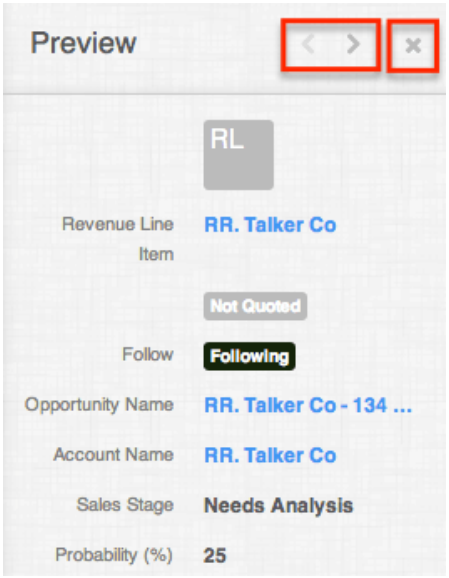



## Preview

Users can view a record's details directly from the Revenue Line Items list view by clicking the Preview icon to the far right of each record's row.

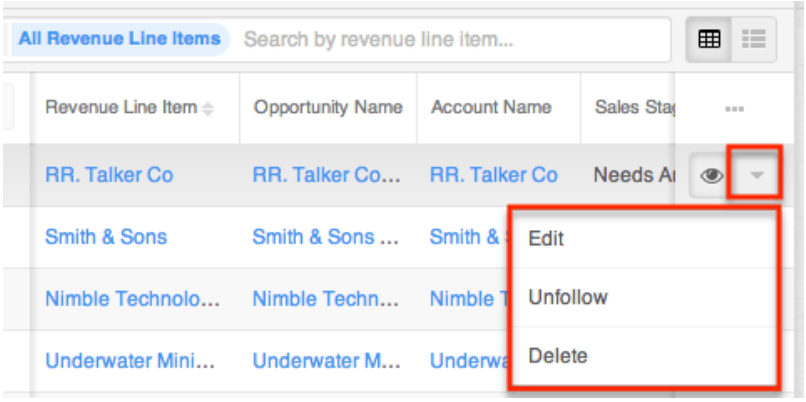



The record's data will display to the right of the list view providing key information regarding the record as well as the related activity stream information. On the upper right of the intelligence pane, there is a Left and Right arrow button that allows you to scroll through the list view's current search results by previewing the next or previous record. To close the preview, simply click the "X" on the upper right of the intelligence pane.




## Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to edit, follow, or delete specific records directly from the list view.



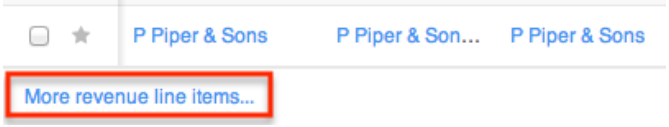

The options in the Record Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this revenue line item |
| Follow | Follow this revenue line item |
| Delete | Delete this revenue line item |

## More Revenue Line Items

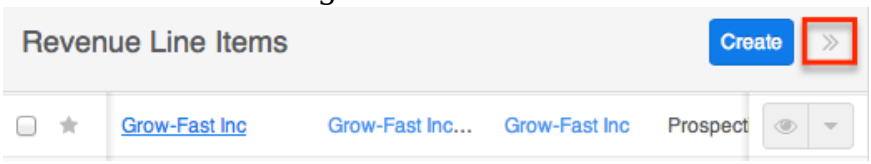
The list view loads an initial number of records meeting the current search criteria

with the option to show additional results at the user's request. By default, Sugar displays 20 records per list view results set, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide. To load the next set of list view results, simply click the More Revenue Line Items link at the bottom of the list view.



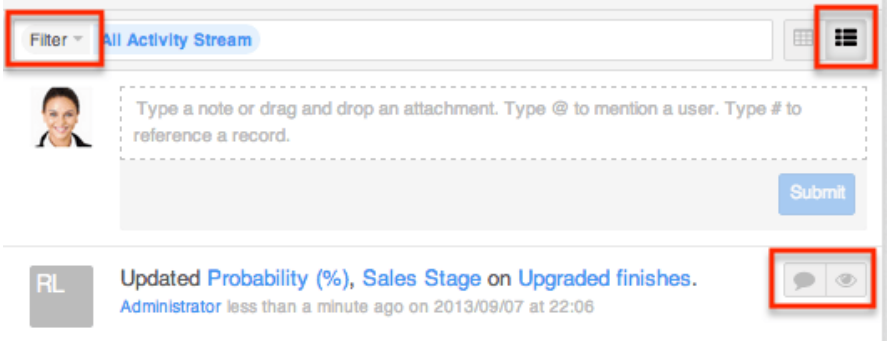

## Right Hand Side Drawer

On the upper right of the Revenue Line Items list view there is a double arrow icon which allows users to expand the list view to the full screen width. The intelligence pane to the right of the list view will be hidden when the list view is expanded. To reduce the list view's width and reveal the intelligence pane, simply click the double arrow icon again.




## Activity Stream

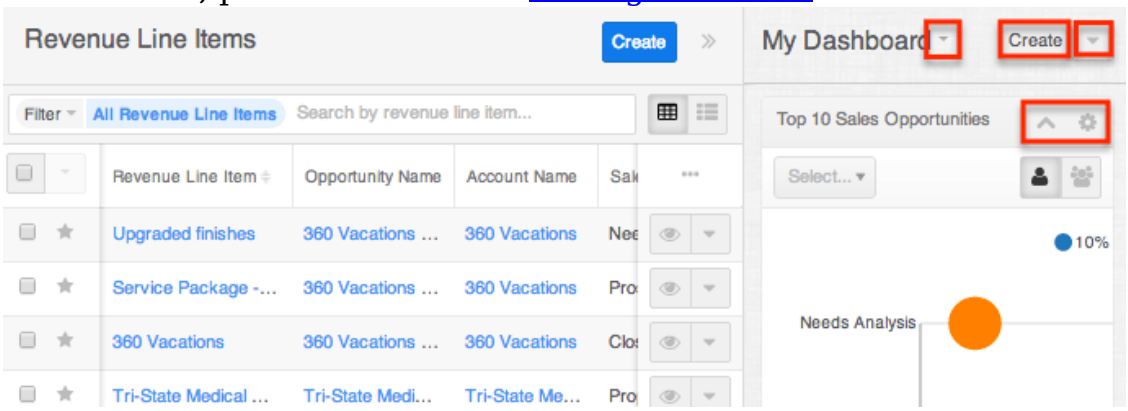
The Revenue Line Items module's activity stream displays user posts made on the Revenue Line Items module and record posts relevant to an individual revenue line item record. To view the module's activity stream, simply click the Activity Stream button to the right of the list view's search bar. For more information on how to add posts to the activity stream, please refer to the Activity Stream documentation. You can add comments to posts using the comment button to the far right of each post. You can also preview the record referenced in record posts by clicking the Preview button to the right of each post. The activity stream can be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box and selecting the desired message type.



## Intelligence Pane

An intelligence pane displays to the right of the Revenue Line Items list view and provides users with valuable record information via various dashlets. The Help dashboard normally displays by default along with the List View Help dashlet and Learning Resources dashlet. The List View Help dashlet provides users with a brief introduction to the module along with a link (e.g. Revenue Line Items documentation) to the corresponding documentation in the Application guide. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may create other dashboards for use with the Revenue Line Items module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets (e.g. My Accounts, etc.) to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do no wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Revenue Line Items module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.




# Revenue Line Items Record View

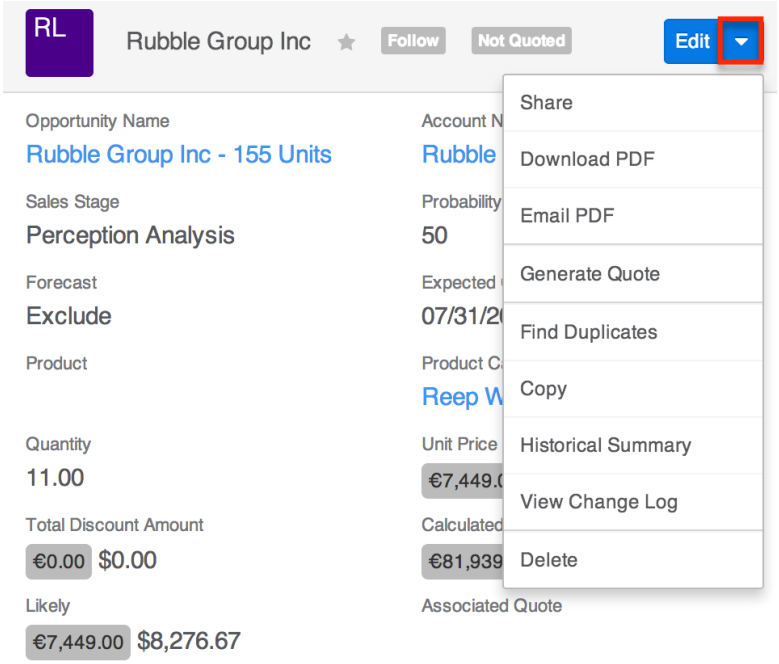
The Revenue Line Items record view displays thorough revenue line item information including all relevant fields. Beneath the fields you can toggle between viewing an account's subpanels of related records (Documents and Notes) and the record's activity stream. The record view can be reached by clicking a revenue line

item record's link from anywhere in the application including from the Revenue Line Item list view.

Please note that you will only be able to view a revenue line item record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Users with administrator or developer access have the ability to change the record view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Actions Menu

The Actions menu on the top right of each revenue line item's record view allows you to perform various actions on the current record.




The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this revenue line item |
| Share | Share a link to this revenue line item via email |
| Download PDF | Download revenue line item information as a PDF file |
| Email PDF | Email revenue line item information as a PDF attachment |

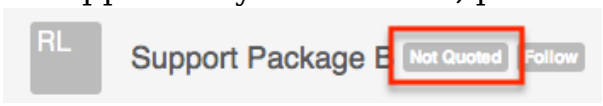
| | |
|---|---|
| Generate Quote | Generate a quote based on this revenue line item |
| Find Duplicates | Locate potential duplicates of this revenue line item |
| Copy | Duplicate this revenue line item |
| Historical Summary | View a historical summary of activities (e.g. calls, meetings, etc.) related to this revenue line item |
| View Change Log | View a record of changes to this revenue line item |
| Delete | Delete this revenue line item |

## Favorite Designation

Users have the option to mark revenue line item records as favorites via the record view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the Revenue Line Items module tab. In the Revenue Line Items record view, the star on the right of the record's name is orange once favorited. For more information on how to mark records as favorites, please refer to the Favoriting Revenue Line Items section of this documentation.

## Quoted Designation

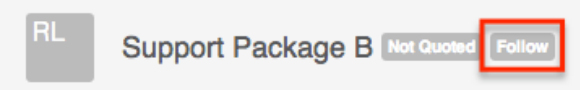
Users have the ability to generate quotes from a single or a collection of revenue line items. This can be done from the Revenue Line Item record view or from the Opportunity record view. Each revenue line item may be a part of only one quote. Once a revenue line item has been included on a generated quote, the Quoted Designation icon will read "Quoted". For more information on generating a quote from the Revenue Line Items record view, please refer to the Generating a Quote section of this documentation. For more information on generating a quote from the Opportunity record view, please refer to the Opportunities documentation.




## Following Designation

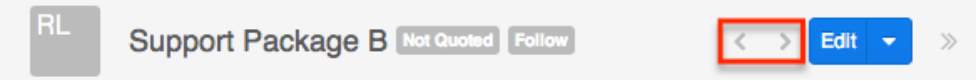
Users also have the option to follow revenue line item records via the record view or list view. This allows users to view record posts from followed revenue line items on their Home page and Revenue Line Items list view activity streams. Each

user can personalize their activity stream by viewing posts for records that are most important to them. From the record view, users may follow or unfollow revenue line items to which they have access using the Follow button to the right of the record's name. For more information on how to mark records to follow via the list view, please refer to the Records Actions Menu section of this documentation. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. If you wish to stop following a specific account record, click the Following button to revert it to gray. Should a user lose access to a record in Sugar, they will automatically stop following that record.




## Next or Previous Record

On the upper right of the Revenue Line Items record view, there are two buttons that allow you to page through each record in the Revenue Line Items list view's current search results. Clicking the Left arrow button displays the previous revenue line item of the current search results while clicking the Right arrow button displays the next record of the current search results.



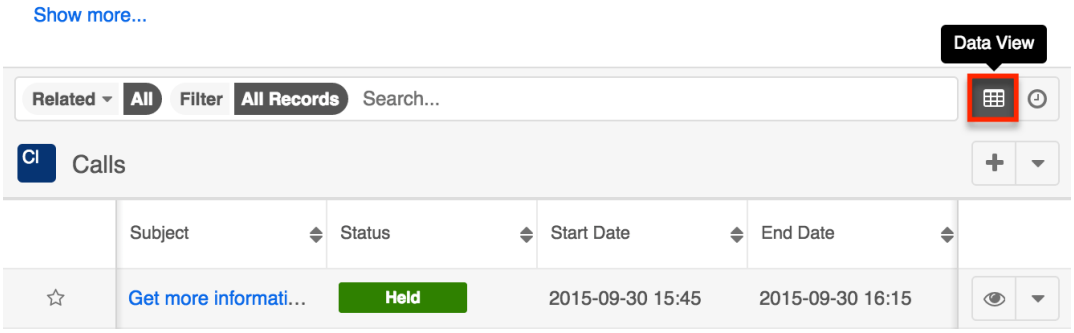

## Show More

The Revenue Line Items record view typically display a few key fields (e.g. opportunity name, probability, product, etc.) on the business card panel with the option to view more fields by clicking the Show More link on the bottom left. Please note that administrators can configure what fields appear on the business card panel via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.



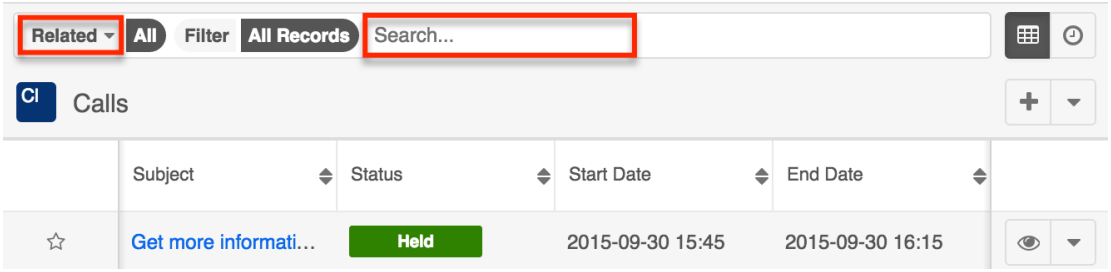

## Subpanels

Beneath a revenue line item record's fields are subpanels containing related records from various modules. Selecting the Data View button will display the subpanels rather than the record's activity stream.




## Filter Options

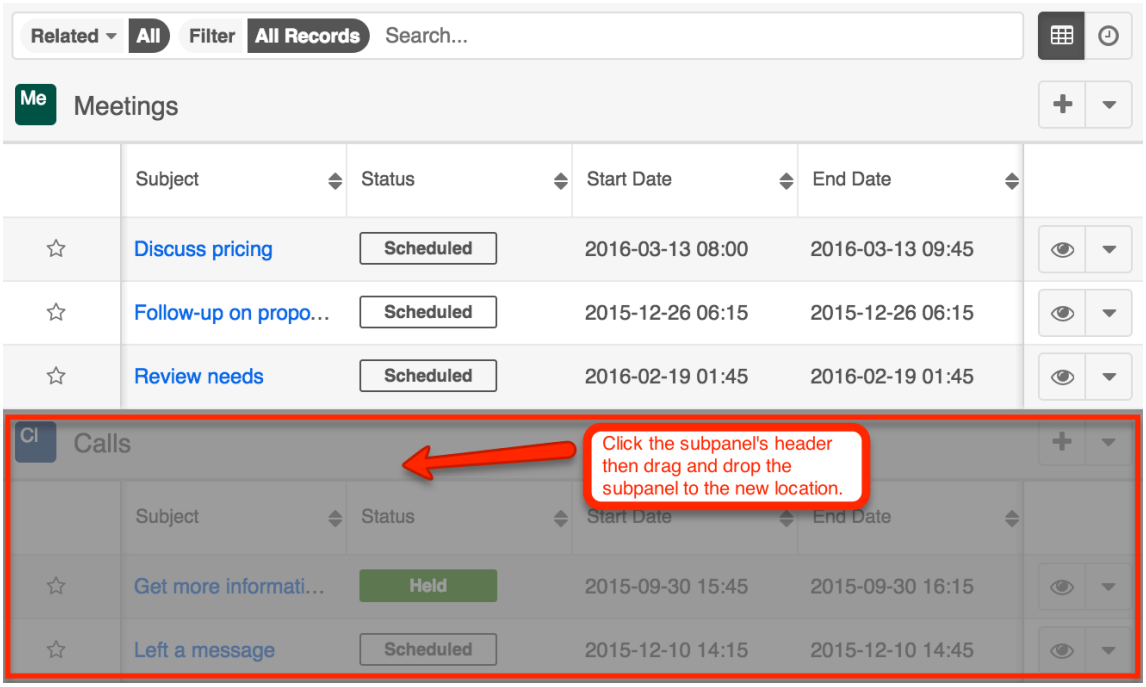
While in Data View, all of the revenue line item record's related records will be displayed beneath the record's fields. Users have the ability to search for records which appear in the subpanels as well as filter the view to only display a specific module. To locate a record by name, enter the keyword into the Search bar, and the subpanel(s) with the matching record(s) will appear below. To filter, simply click the Related option to the far left of the Search bar and select the module whose subpanel you wish to view. Filter and search may be combined to only display matching records within a selected module. To see all subpanels to which you have access, simply select "All" in the Related options and remove any text from the search bar. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the page. Returning to the page will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.




When a Sidecar module (e.g. Notes) is selected from the Related options, you have the option to filter the related subpanels further using one of the available options (e.g. My Favorites, Recently Created, etc.). Please note that you can also create custom filters for related Sidecar modules. Once the related module (e.g. Notes) is selected, either click the Filter option and select "Create" or click "Create" to the right of the Filter option. For more information on creating a related records filter, please refer to the Creating a Related Records Filter section of the Search documentation.

## Reordering Subpanels

Users can easily move subpanels to a new location on the record view by dragging and dropping the subpanel's header. The new subpanel order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared.




Related Record Subpanels

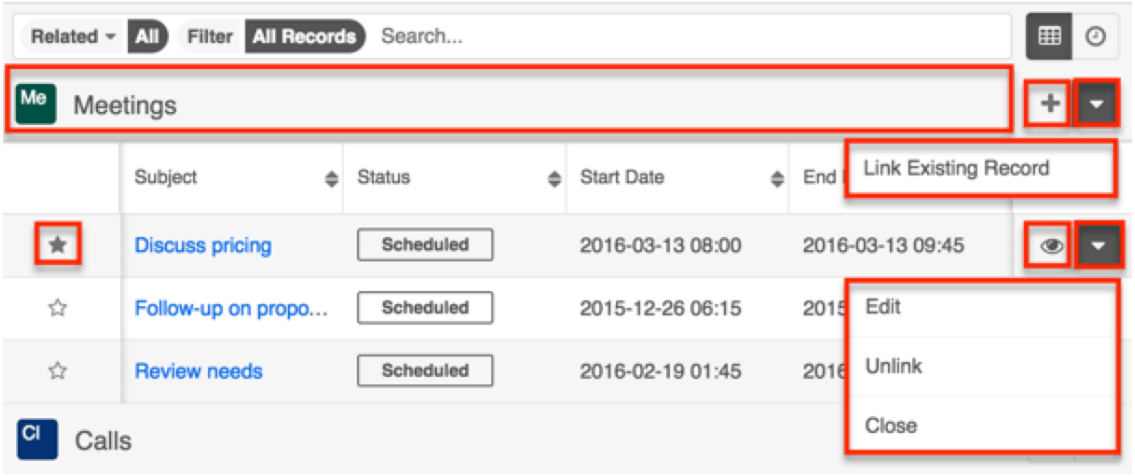
The only type of subpanel displayed out-of-the-box on a revenue line item record view is the revenue line item's related documents. For every relationship between two modules, the relationship type determines whether a related record will be displayed in the field listing or in a subpanel. Revenue line items may be related to multiple documents, so the Documents subpanel appears below the record's fields.

Users with administrator or developer access have the ability to change the fields (e.g. Name, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.

Related record subpanels allow the following operations to be performed:

- To view the details of a related record, click the record's name in the subpanel to open it in record view.
- To relate an existing record to the account, choose "Link Existing Record" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the account, click the Plus button to the left of the Actions menu, then complete the record view layout and click "Save".

- To delete the revenue line item's relationship to a record, click "Unlink". This removes the relationship, but does not delete the record itself.
- To mark the record as a favorite, click the star icon to the left of the desired record's row.
- To collapse or expand the subpanel, click anywhere on the subpanel's header.
- To change the column size in the subpanel, place your cursor on the column divider and when the Left and Right arrow appears, click and drag the column to the desired size. For more information on resizing columns, please refer to the Column Resizing section of this documentation.
    - Sugar enforces a minimum width for currency fields (e.g. Best, Likely, etc.) in list view columns which prevents the columns from being collapsed beyond this limit.
    - Note: The subpanel column width will not be preserved when you navigate away from the page.



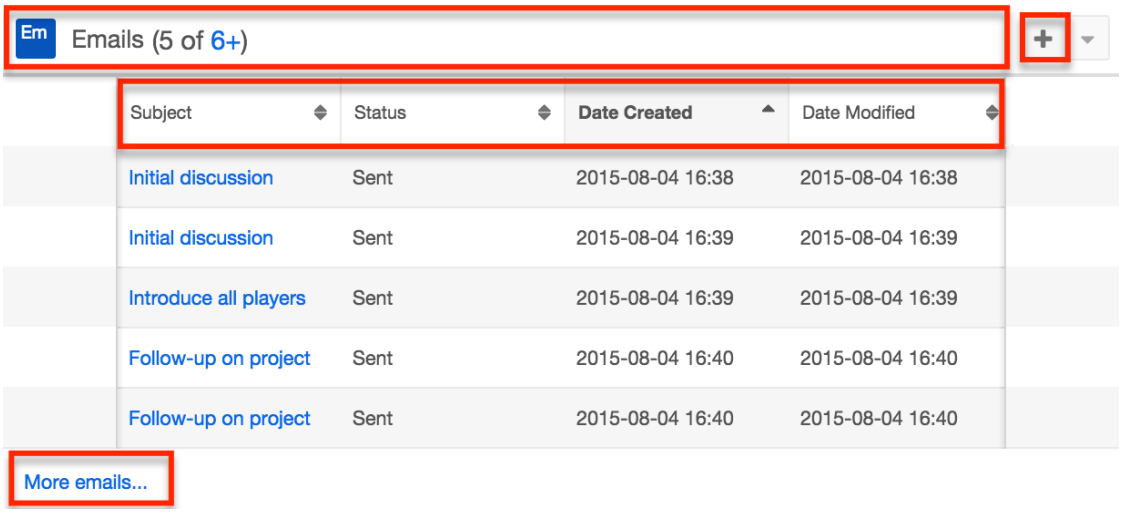

Emails Subpanel

The Emails subpanel in the [Module Name] module displays both emails implicitly and explicitly related to the account record. Emails in Sugar are implicitly related to records in Sugar that match an email address in the From, To, or Cc fields in the email. This implicit relationship is made for emails sent from Sugar as well as any email imported into Sugar via Inbound email accounts or email archiving. While composing an email or relating an existing email to a record, users have the ability to set an explicit relationship via the flex relate field by Relating Emails. This allows the email to be explicitly related to a single record from one of many modules.

The Emails subpanel allows the following functions to be performed:

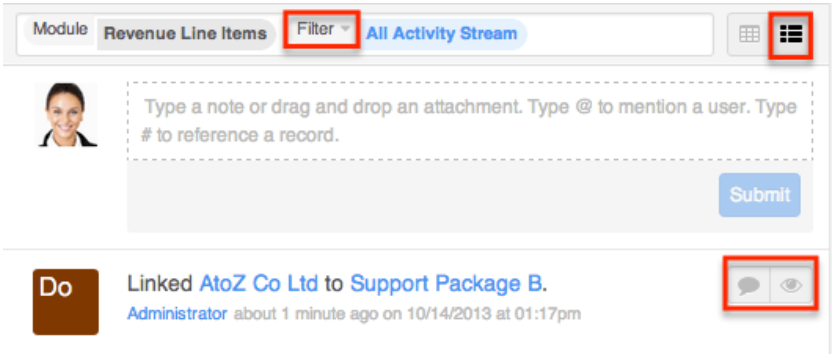
- To view the details of an email, click the subject in the subpanel to open it in detail view.

- To collapse or expand the subpanel, click anywhere on the subpanel's header.
- Click "+" to create a new email that will have an implicit relationship with this record.
- Sort the emails by Subject, Status, Date Created, Date Modified, or Assigned User.
- Click "More emails" to see any additional emails hidden by the default view.
- To change the column size in the subpanel, place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. For more information on resizing columns, please refer to the Column Resizing section of this documentation.
    - Note: The subpanel column width will not be preserved when you navigate away from the page.




## Activity Stream

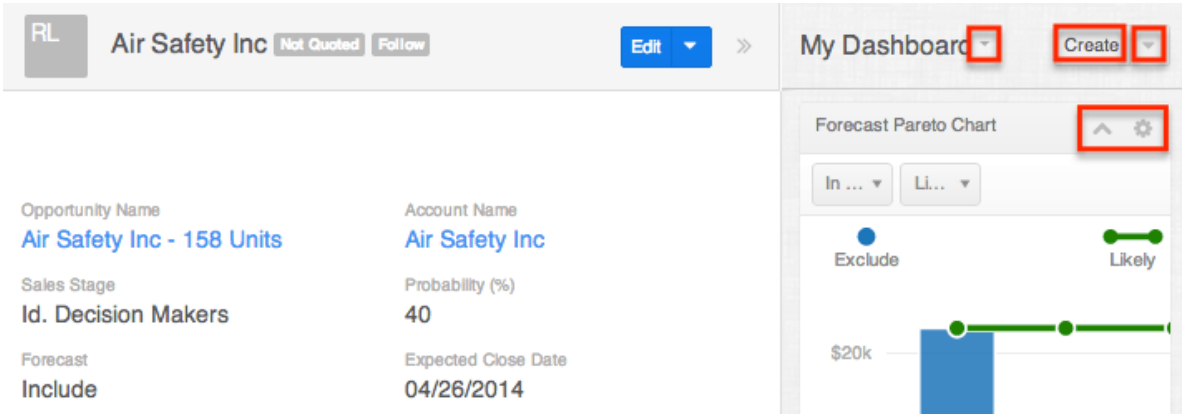
The Revenue Line Item record view's activity stream displays user posts and record posts specific to the individual revenue line item record. To view the record's activity stream, simply click the Activity Stream button below the account's fields. Users can view all posts in the record view's activity stream even if they do not follow the record in Sugar. Please note that you must follow the record if you wish to view the record view posts via the Home page or List View activity stream. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts by clicking the Comment button to the far right of each post, entering in your comment, then clicking "Reply". You can also preview the record referenced in the record post by clicking the Preview button. The activity stream can also be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box then selecting the desired message type.




## Intelligence Pane

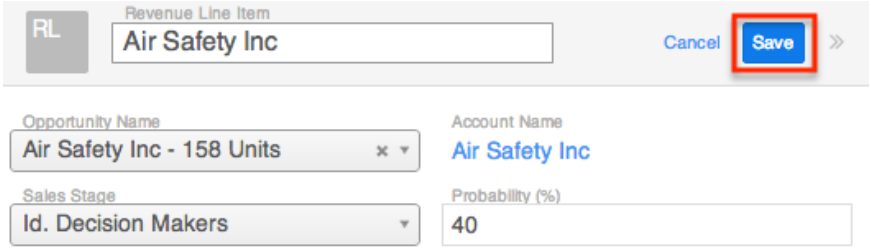
An intelligence pane displays to the right of the revenue line item's record view and provides users with valuable information specific to the record's forecasting and other data. The Help Dashboard normally displays by default along with the Record View Help dashlet and Learning Resources dashlet. The Record View Help dashlet provides users with a brief introduction to the module along with some instructions to help users utilize and navigate around the record view. A link to the corresponding documentation (e.g. Revenue Line Items documentation) in the Application guide is also provided within the Help dashlet. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard, which will display some stock dashlets (e.g. Planned Activities dashlet, History dashlet , etc.) by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may choose to view any of their dashboards using the triangle to the right of the current dashboard's name and may create other dashboards for use with the Revenue Line Items module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do not wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Accounts module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.




# Editing Revenue Line Items

Revenue Line Items may be edited at any time to update or add information to the record. You can make changes to existing records via the Revenue Line Items record view. The record view is available within the Revenue Line Items module and includes all of the fields you should need. Your revenue line item record may include some fields which are automatically populated when and if a Product Catalog item is selected

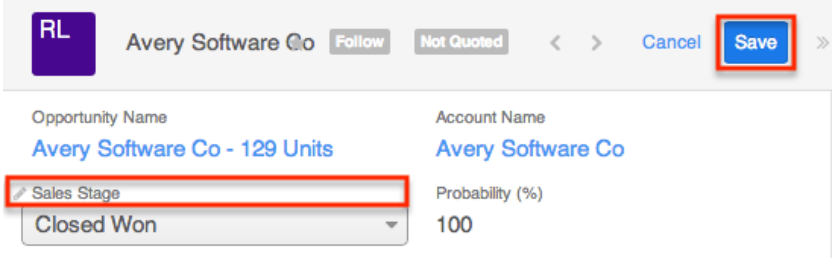



Please note that your ability to edit revenue line items in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure the Revenue Line Items edit view via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

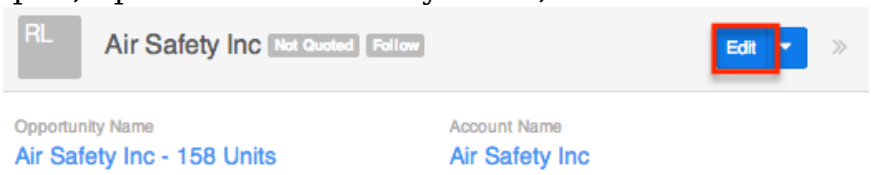
## Editing Inline Via Record View

Users can edit individual fields on the Revenue Line Items record view without entering the full edit mode by clicking the field name. Fields which are available for inline editing will display a pencil icon when hovering on the field name or value. This will allow users to type or select a new value. Click "Save" to preserve the changes made to the field.



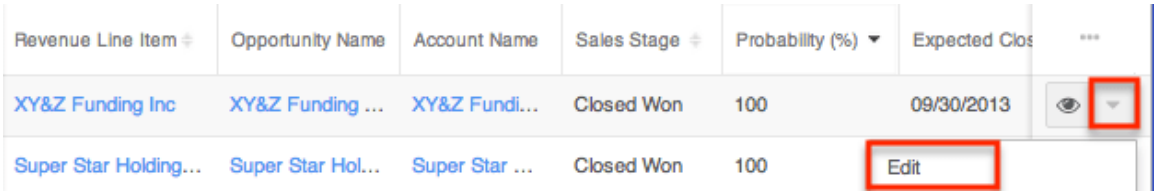

## Editing Via Record View

You can edit many revenue line item fields at once via the record view by clicking the Edit button on the upper right of the page. Once the record view layout is open, update the necessary fields, then click "Save" to preserve the changes made.

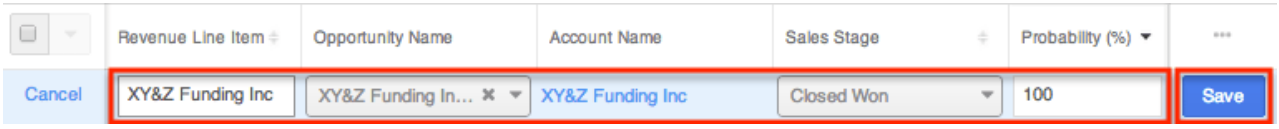



## Editing Inline Via List View

You can also edit individual fields on the Revenue Line Items list view without entering the full edit mode. Click the Record Actions menu to the far right of the record's row and select "Edit".




The fields on the record's row will open up allowing user's to type or select a new value. You can click the double arrow icon on the upper right of the page to expand the list view for editing. Click "Save" to preserve the changes made to the revenue line item record.




Note: Text area fields are not inline editable from list views.

# Deleting Revenue Line Items

If a product record is invalid or should no longer appear in your organization's

Sugar instance, it may be deleted as long as it's Status field is not set to "Closed Won" or "Closed Lost". For data integrity purposes, closed revenue line items may not be deleted. Deletion may be performed from either the Revenue Line Items detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting revenue line item records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

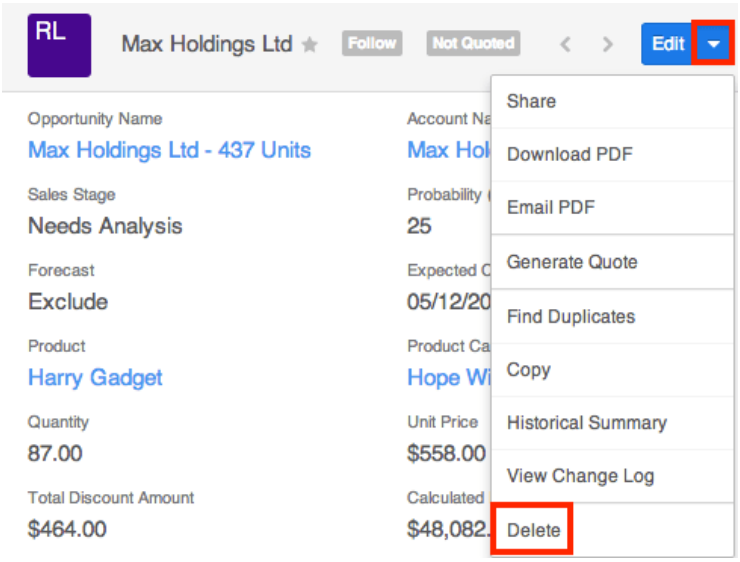
Note: A revenue line item may be deleted only if its Status field is not set to "Closed Won" or "Closed Lost". For data integrity purposes, closed revenue line items may not be deleted.

Please note that your ability to delete revenue line items in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

## Deleting Via Record View

Use the following steps to delete a revenue line item record via the record view:

1. Navigate to a revenue line item's record view.
2. Select "Delete" from the Actions menu.

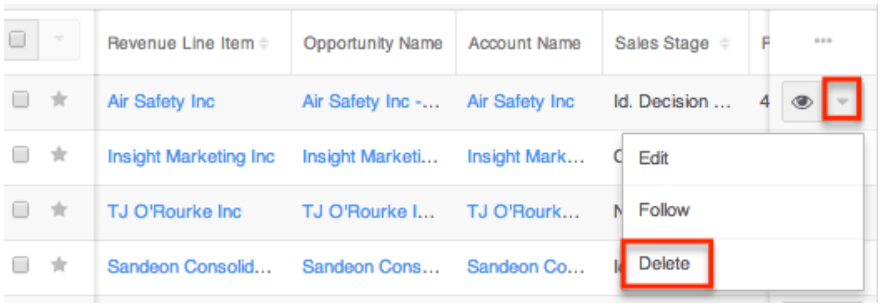



3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

## Deleting Via List View

Use the following steps to delete a revenue line item record via the list view:

1. Navigate to the Revenue Line Items list view by clicking the Revenue Line Items module tab.
2. Use the Module Search to find the Revenue Line Item record you wish to delete.
3. Click the Record Actions Menu to the far right of the record's row and select "Delete".

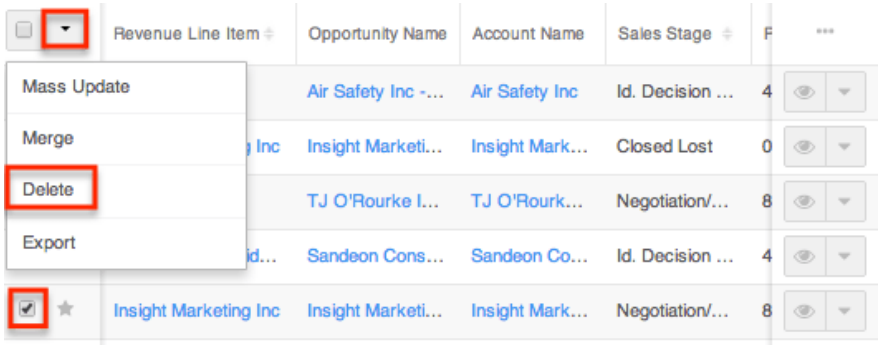



4. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

## Mass Deleting Via List View

Use the following steps to delete one or more revenue line item records via the list view:

1. Navigate to the Revenue Line Items list view by clicking the Revenue Line Items module tab.
2. Use the Module Search to find the revenue line item records you wish to delete.
3. Select the desired records then choose "Delete" from the Actions menu.



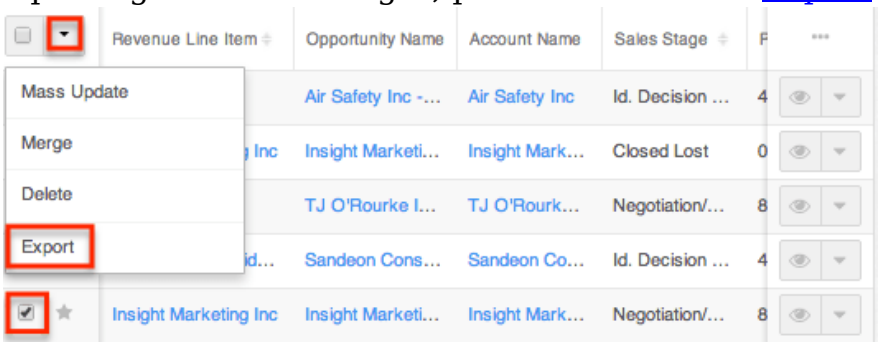

4. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

You can also use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to delete more than 1000 records or delete a specific group of records on the list view, please use the in module search to perform the deletions in smaller batches.

## Exporting Revenue Line Items

Sugar's Export option allows users to download all fields for the selected revenue line items to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Revenue Line Item data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered products back into Sugar. For more information on updating existing records via import, please refer to the Import documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of records. If you encounter an error when performing this action, it is recommended to select the records in smaller batches.

Records may be exported from the Revenue Line Items list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for revenue line items and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.




Please note that your ability to export products from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

## Mass Updating Revenue Line Items

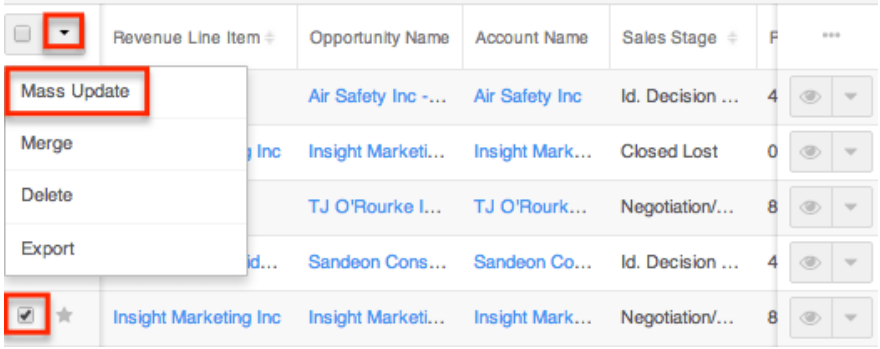
Mass Updating allows users to make the same change to multiple records at once from the Revenue Line Items list view. Users with administrator or developer level access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide.You can use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to update more than 1000 records or update a specific group of records on

the list view, please use the filter option in module search to perform the updates in smaller batches.

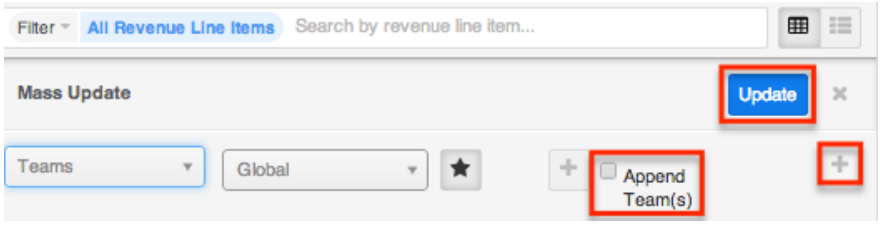
Please note that your ability to mass update revenue line items may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

Use the following steps to mass update revenue line item records from the list view:

1. Navigate to the Revenue Line Items list view by clicking the Revenue Line Items module tab.
2. Use the list view's Module to identify records you wish to modify.
3. Select the desired revenue line items then choose "Mass Update" from the Actions menu.




4. The Mass Update panel will appear below the search bar. Set values for the field(s) you wish to alter.
   - To add additional fields for mass update, click the Plus icon to the right of the dropdown list.
   - Note: For the Teams field, mark "Append Team(s)" to add the teams specified here to any existing team assignments. Not marking the checkbox will replace the existing team assignment with the new one.




5. Click "Update" to save the changes to all of the currently selected revenue line item records.

## Recalculating Calculated Values

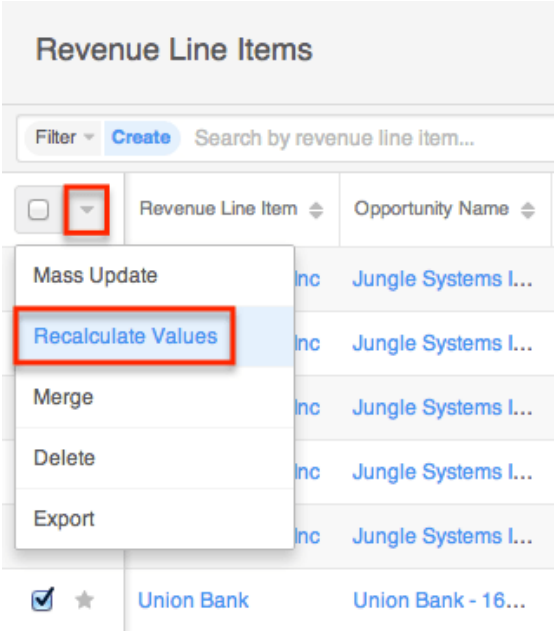
This feature allows calculated values to be recalculated following the addition or

alteration of a calculated field in Studio. For more information on calculated fields, please refer to the Studio documentation in the Administration guide. Sugar allows you to select up to 1000 records at a time for recalculating values. If you desire to recalculate values for more than 1000 records, you will need to perform the recalculation in several batches.

Note: This action will not appear unless the user is an Admin or has developer-level access to the module and if there is at least one calculated value in that module. Please note that your ability to recalculate values may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Recalculate Values option.

The following steps cover recalculating values for records from the Revenue Line Items list view as an example:

1. Navigate to the Revenue Line Items list view by clicking the Revenue Line Items module tab.
2. Use the list view's Module Search to identify revenue line items you wish to update.
3. Select the desired revenue line items then choose "Recalculate Values" from the Actions menu.




## Finding Duplicate Revenue Line Items

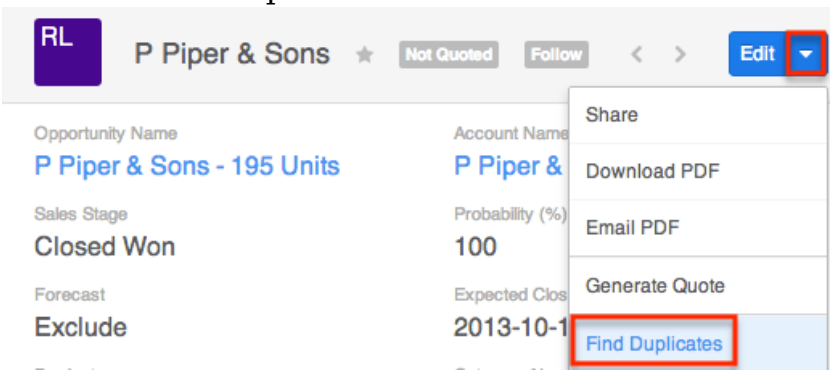
Between multiple users working in Sugar, importing new records, and converting leads, it is possible for duplicate revenue line item records to be accidentally input to the system. Before creating a new revenue line item record, a good practice is

to first check that the revenue line item does not already exist in Sugar. You can locate duplicate records for cleanup using module search from the Revenue Line Items list view. Searching for revenue line items with similar names or other information can turn search into a powerful, duplicates-finding tool. Sugar also provides a wizard for finding potential duplicates that is available from the Revenue Line Items record view and may be used as shown below. If duplicate revenue line item records are detected, you can perform a merge per the Merging Revenue Line Items section of this documentation.

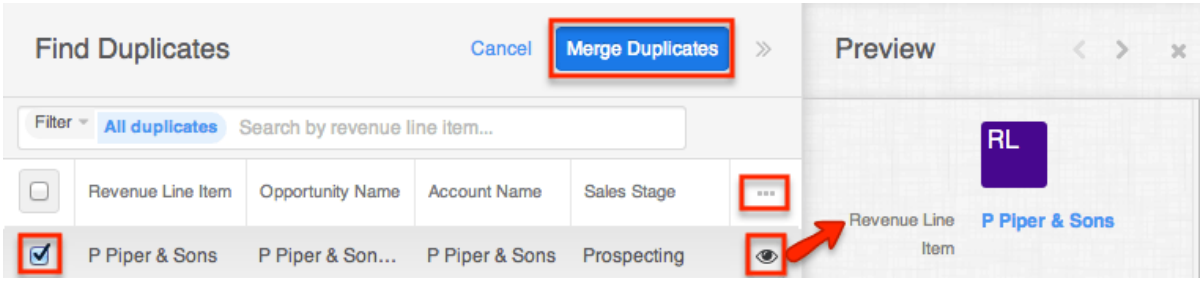
Please note that your ability to use the Find Duplicates action may be restricted by any role which prevents revenue line item deletion. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Find Duplicates option.

Use the following steps to locate duplicate revenue line items using the Find Duplicates option from the Revenue Line Items record view:

1. Navigate to a revenue line item's record view.
2. Choose "Find Duplicates" from the Actions menu.




3. Potential duplicate revenue line item records will be listed on the Find Duplicates page. Select the duplicate record(s) you wish to merge then click "Merge Duplicates".
    - You can preview the duplicate record's details by clicking the Preview button to the far right of the records row.
    - You can search for specific records from the Revenue Line Items list view if you wish to check for more possible duplicates. For more information on performing a search, please refer to the Module Search section of this documentation.
    - You can also click the Column Selection icon above the Preview button to change the list of fields that display on the list view column headers.




Once you click "Merge Duplicates", the merging process with the current record will begin. For instructions on performing the merge that follows, please refer to Steps 3-9 of the Merging Via List View section of this documentation.

## Merging Revenue Line Items

When duplicate records are identified in Sugar, you have the option to merge two or more revenue line items into a single record. Once the merge is complete, the duplicate revenue line item record(s) will be deleted, and the primary record will remain. Please note that all relationships belonging to the duplicate accounts will be merged to the primary record with the related records now linked to the resulting, merged revenue line item record.

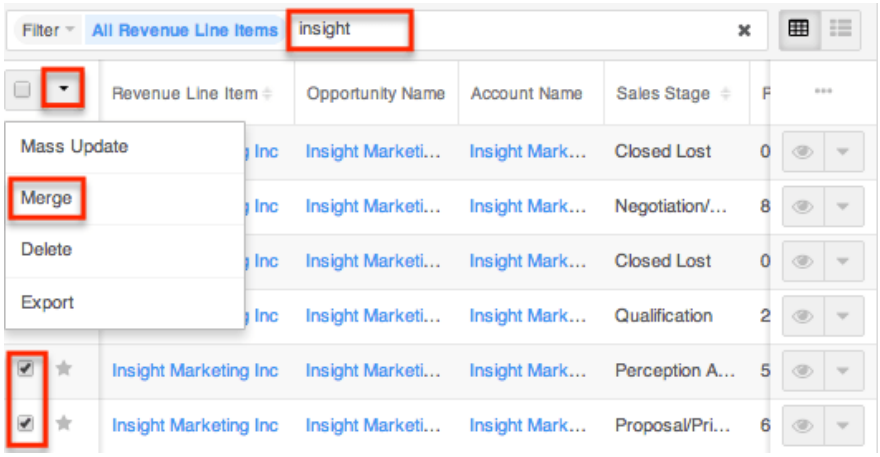
Note: Date Created, Date Modified, and Password field types are not supported when merging duplicate records in Sugar.

### Merging Via List View

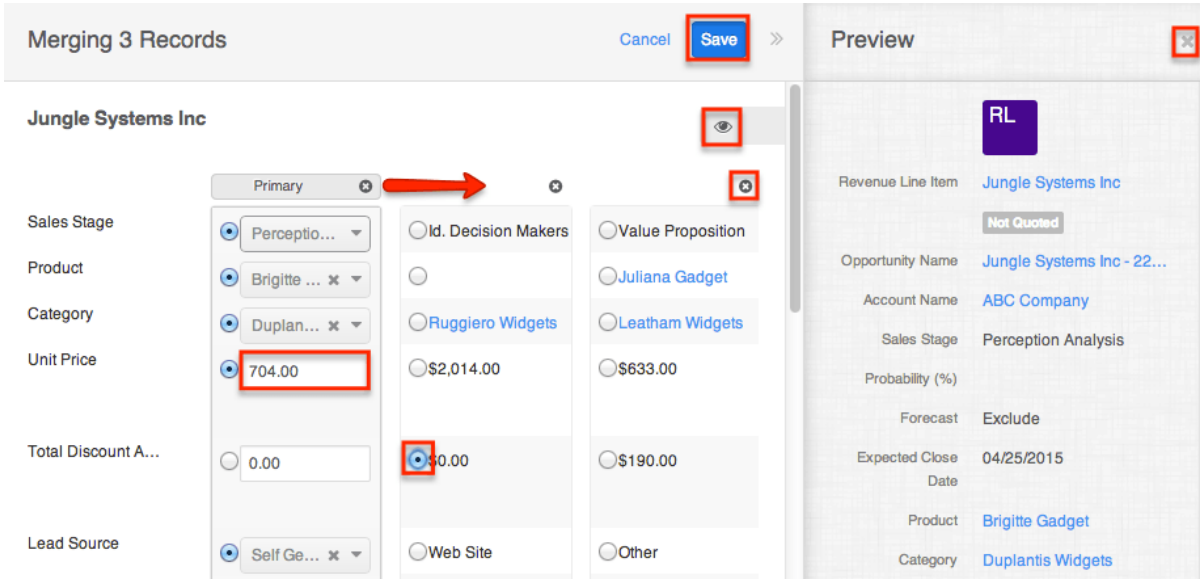
Module Search may be used to identify duplicate revenue line items by, for example, searching for records with similar names. Once your search has identified duplicate revenue line items, you can merge them directly from the Revenue Line Items list view.

Use the following steps to merge revenue line items via the list view:

1. Use the list view's Module Search to identify duplicate revenue line items.
2. Possible duplicates will be displayed in the list view. Select the duplicate record(s) that you wish to merge.
    - Please note that up to five records may be merged at once in Sugar. An error message ("Invalid number of records passed. The valid range is from 2 to 5 records.") will appear if more than five records are selected when attempting to perform a merge.




3. Select "Merge" from the Actions menu to display the Merging Records page. The primary record's field values are displayed on the left while other record's values are in columns to the right. For convenience, fields with differing values will appear on the top of the list. Saving the merge will preserve only the field values marked with the radio button into a single record.




If 3 or more records are selected to be merged, an X icon will appear at the top right of each record. Clicking the "X" will remove the record from the merge process but will not delete the record.

4. To change which record is considered the primary, drag and drop the Primary label on the top of a different column.
5. Review the field values in each column and click the radio button to the left of the value that should appear on the final record. You can also manually type or select a new value for any field.
    - Note: Fields you do not have Edit access for cannot be edited on the merging records page.

6. Preview what the final, merged record will contain as you work by clicking the eye icon to display the preview in the Intelligence Pane.
7. Click "Save" once all fields you wish to appear on the single, merged record have their radio buttons selected.
8. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Ok" to proceed.

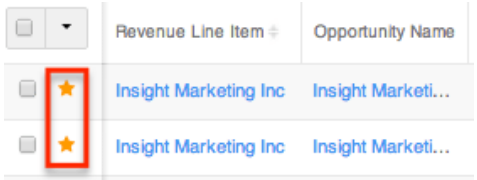
## Favoriting Revenue Line Items

Each Sugar user has the option to designate their own favorite revenue line items which are important or will be viewed often so that they can easily be accessed via search or from the Revenue Line Items module tab. Once records are marked as favorites, select the "My Favorites" filter in Module Search or select from your most recent favorites directly from the Revenue Line Items module tab.

### Favoriting Via List View

Use the following steps to mark records as favorites via the Revenue Line Items list view:

1. Navigate to the Revenue Line Items list view by clicking the Revenue Line Items module tab.
2. Use the Module Search to find the records you wish to mark as favorites.
3. Mark the star icon on the left of each desired revenue line item's row.




4. To remove the account as a favorite, click the star again to revert it to gray.

### Favoriting Via Record View

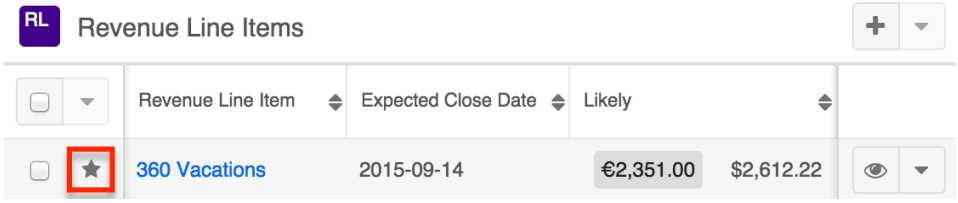
Use the following steps to mark records as favorites via the Revenue Line Items record view:

1. Navigate to a revenue line item's record view.
2. Click the star icon to the right of the revenue line item's name in the upper left of the record view to designate it as a favorite.
3. To remove the record as a favorite, click the star again to revert it to gray.

### Favoriting Via Subpanel

Use the following steps to mark revenue line item records as favorites via the subpanel in related modules:

1. Navigate to a related module's record view.
2. Click the star icon to the left of the desired record's row in the Revenue Line Items subpanel.




3. To remove the revenue line item as a favorite, click the star again to revert it to white.

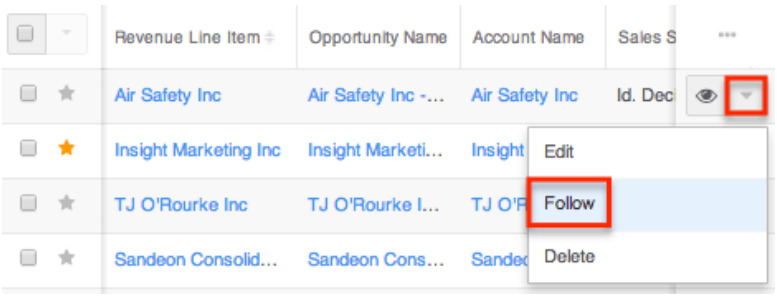
## Following Revenue Line Items

Users can also choose to follow specific revenue line item records to which they have access to in Sugar by clicking the Follow button (If grayed out) to the right of the record's name. This allows each user to personalize their activity stream by specifying which records' posts should appear on the activity streams displayed on their Home page and Accounts list view. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. Should a user lose access to a record in Sugar, they will automatically stop following that record.

### Following Via List View

Use the following steps to mark a record to follow via the Revenue Line Items list view:

1. Navigate to the Revenue Line Items list view by clicking the Revenue Line Items module tab.
2. Use the Module Search to find the records you wish to follow.
3. Click the Record Actions menu to the far right of the records row and select "Follow".

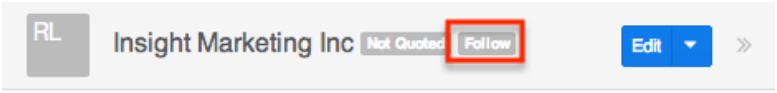



4. To stop following the revenue line item, click the Record Actions menu then select "Unfollow".

### Following Via Record View

Use the following steps to mark a record to follow via the Revenue Line Items record view:

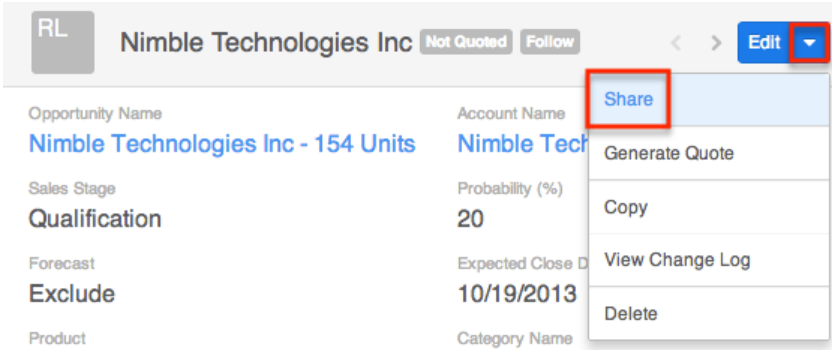
1. Navigate to a Revenue Line Items record view.
2. Click the Follow button to the right of the record's name.




3. To stop following the revenue line item, click the button again to revert it to grey.

## Sharing Revenue Line Items

Individual Revenue Line Item records can be shared with other users in your organization by sending an email with the record's link directly from the record view. In the revenue line item's record view, select "Share" from the Actions menu which will open a Compose Email window including the URL of the revenue line item record. Enter the recipient(s) email address in the To field then click "Send".

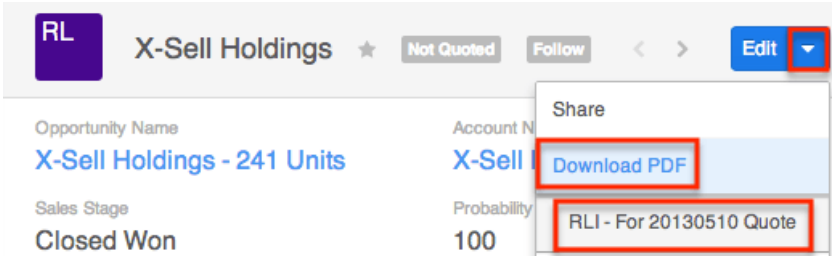



Users can simply click the link in the email to access the revenue line item record in Sugar. Please note that the user must be logged into Sugar in order to access the record. Users will only be able to view the shared record as allowed by their

team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

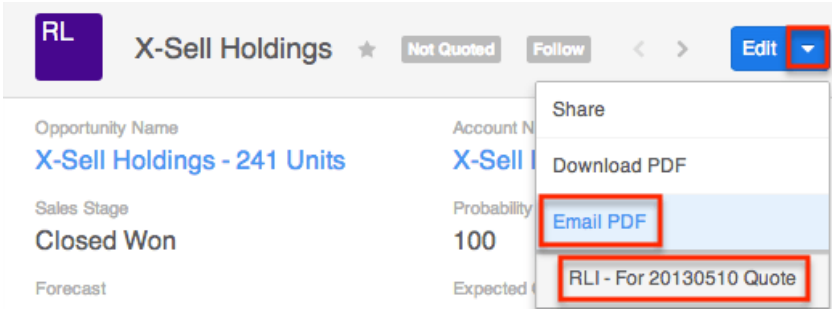
## Downloading Revenue Line Item Information as a PDF

Users have the option to download revenue line item information as a PDF file via the Revenue Line Items record view by clicking the Actions menu and selecting "Download PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Download PDF option in the Actions menu. Simply select one of the templates to generate the PDF file to view or save onto your local machine. Please note that the Download PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.



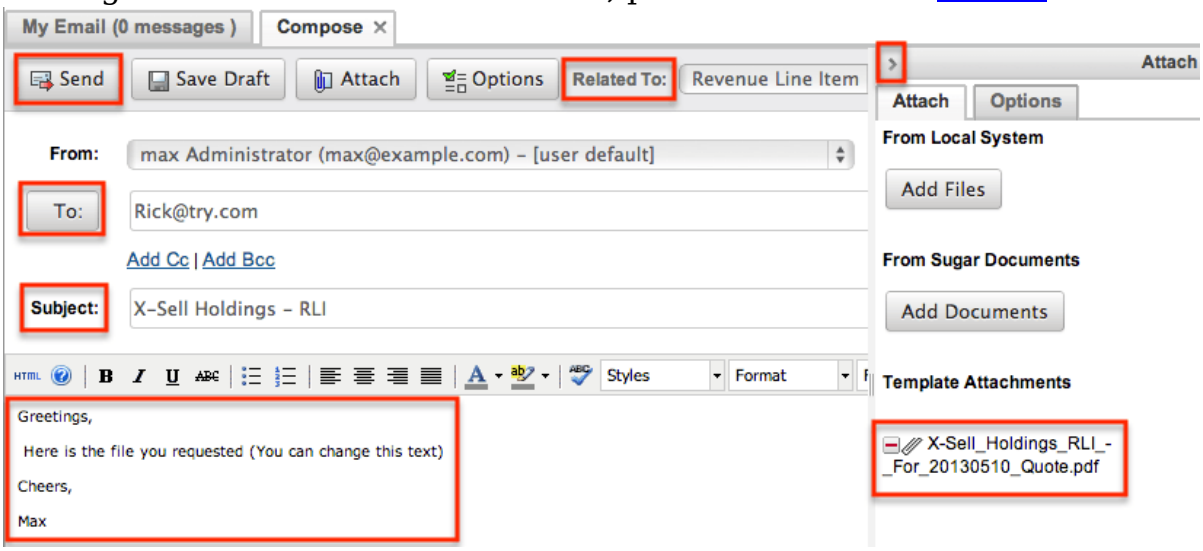

## Emailing Revenue Line Item Information as a PDF

Users also have the option to email revenue line item information as a PDF file using any of the available Revenue Line Items module templates using Sugar's email client. Simply click the Actions menu and select "Email PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Email PDF option in the Actions menu.




Select one of the templates to open a Compose window in the Emails module. The email's To field will automatically populate with the email address of the revenue line item record, and the Subject field will display the revenue line item's name. The email is automatically related to the revenue line item record, and the chosen

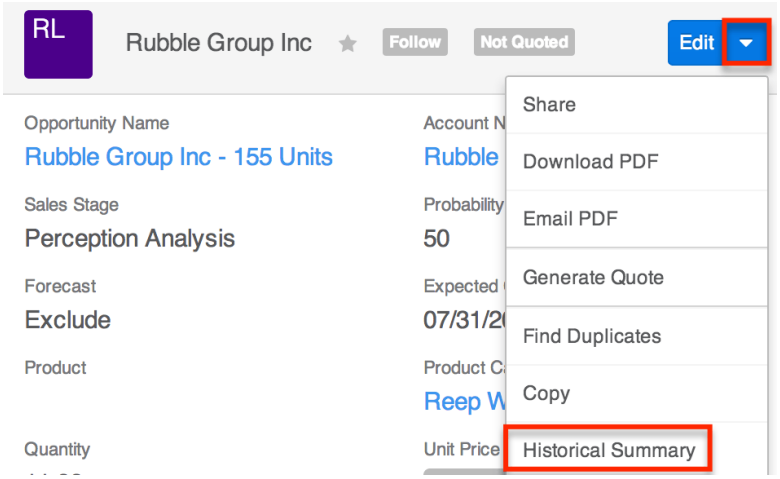
revenue line item PDF will be attached. You can update the fields as necessary and enter a body for the email message then click "Send". For more information on sending emails via the Emails module, please refer to the Emails documentation.




Please note that the Email PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.

## Viewing Activities' Historical Summary

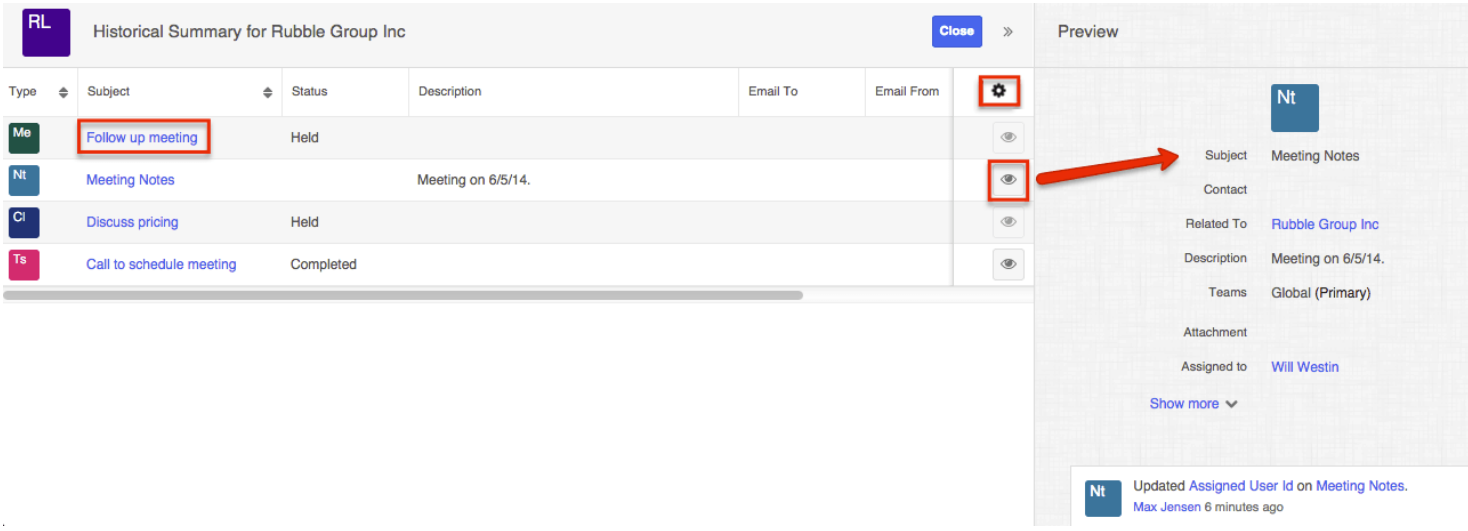
Users can easily view quick details for the various related activities (e.g. calls, meetings, notes, emails, etc.) that have taken place via the Historical Summary option. Simply navigate to the revenue line item's record view and select "Historical Summary" from the Actions menu to view the historical activities related to the revenue line item in one place.



The Historical Summary page will display each activity's type, subject, status, description, date modified, etc. and you can simply click the activity's name to view the full details for each activity. Please note that you can add Date Created and User fields by clicking the Column Selection icon to the far right of the list view column headers. You can also preview the activity record via the intelligence pane by clicking the Preview icon to the far right of each record's row. It will provide users with key information regarding the record as well as the related activity stream information (if any). For more information on activity streams, please refer to the Activity Streams documentation. Please note that preview is only available for modules (e.g. Task, Note) using the Sidecar user interface.

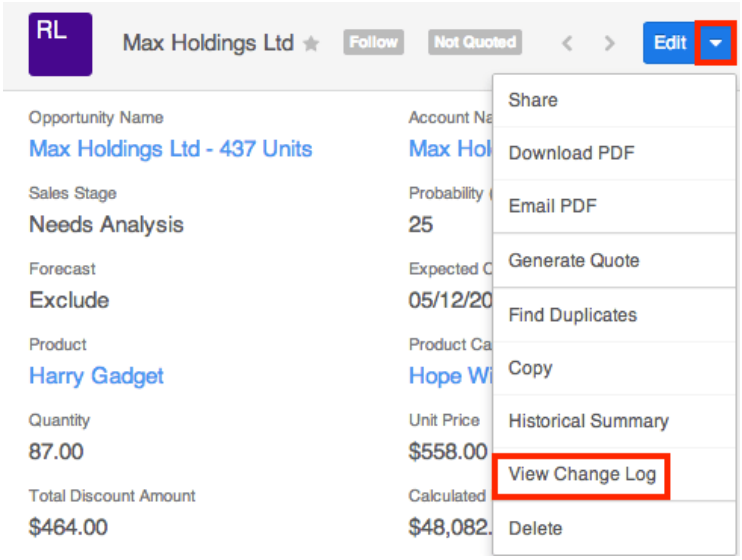
The historical summary list view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the system's default column order.

Users can also easily adjust the size of columns in the historical summary list view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the Historical Summary list view is different from the default column width.

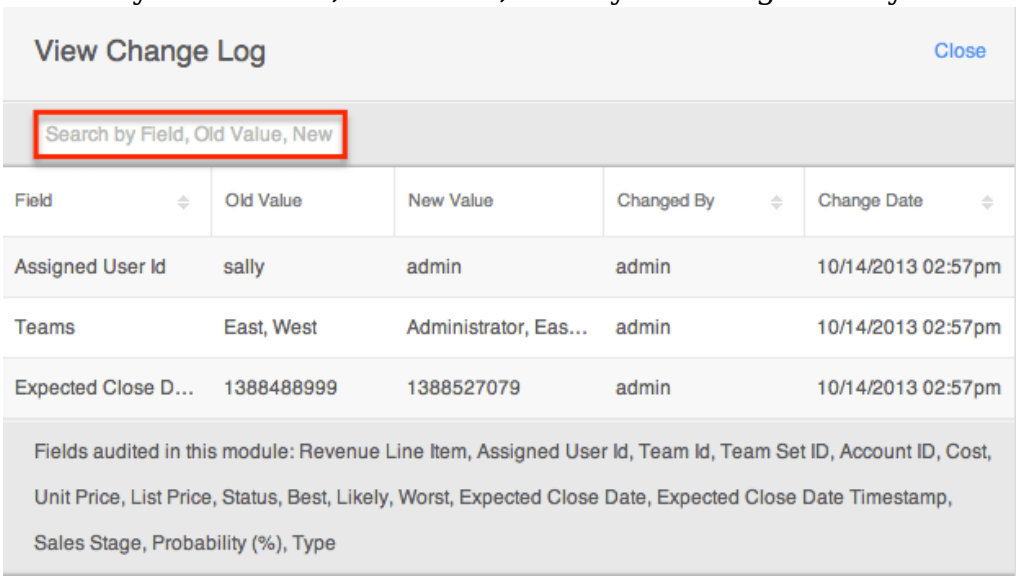


## Viewing Revenue Line Item Change Logs

Changes made to each revenue line item record are tracked over time, and users are able to view the history of changes via the change log in each revenue line item's record view. To view the change log, navigate to a revenue line item in record view and select "View Change Log" from the Actions menu. Please note that only fields marked as "Audit" in Admin > Studio will be displayed in the change log. For more information on designating for audit, please refer to the Studio documentation in the Administration guide.




Once the change log opens, you can view the details of historical changes and can search by field name, old value, etc. by entering the keyword into the search box.




## Generating a Quote

Users may use one or more revenue line items to generate a new quote. Doing so copies all relevant information from the revenue line item(s) to the new quote's fields. After being used in a quote generation, the revenue line item will show a Quoted icon at the top of its record view. Revenue line items which have not been included on a quote display a Not Quoted icon instead. Only revenue line items which include a product from the Product Catalog in their Product field may be used to generate a quote. The generated quote will be automatically linked to the revenue line item and displayed in its Associated Quote field.

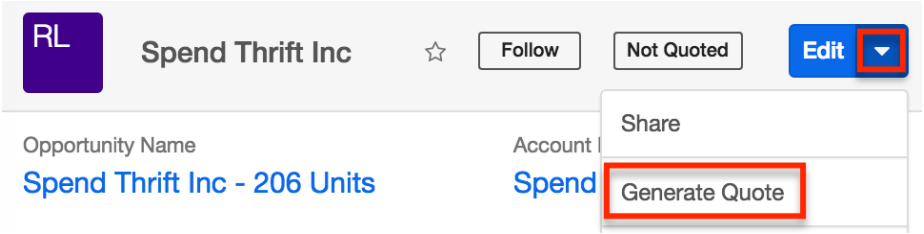
Please note that each revenue line item may be used to generate a quote only once. The option will no longer be available from a revenue line item's record view once it has been included on a quote.

## Generate a Quote Via Record View

Users may generate a quote from a single revenue line item record from the Revenue Line Item record view.

Use the following steps to generate a quote via the Revenue Line Item's record view:

1. Navigate to an unquoted revenue line item's record view.
2. Select "Generate Quote" from the Actions menu.



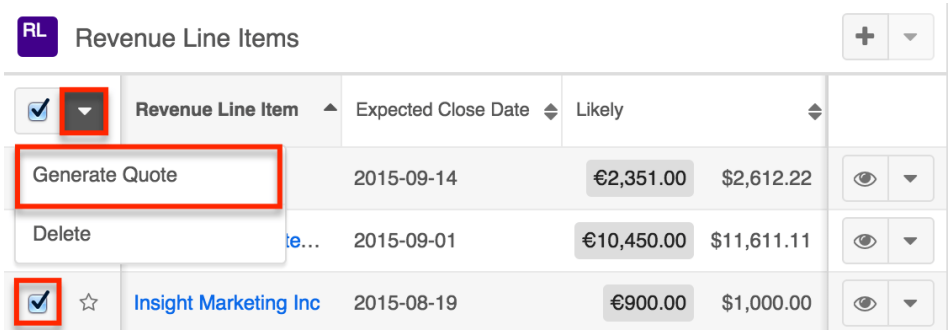

3. The quote record that opens in edit view will have all relevant fields and line items automatically populated from the revenue line item record. Make any necessary modifications, then click "Save" to preserve your changes.

## Generate a Quote Via Subpanel

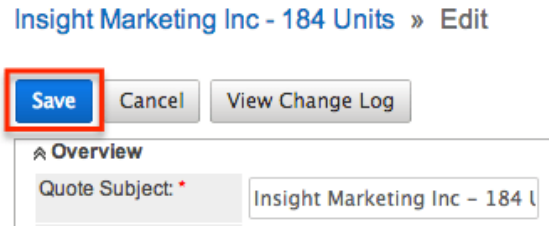
Users may also generate a quote from one or more revenue line items on an opportunity record.

Use the following steps to generate a quote via the Revenue Line Items subpanel on an opportunity record.

1. Navigate to an opportunity in record view.
2. Scroll to the Revenue Line Items subpanel in Data View below the opportunity's fields.
3. Select the checkboxes of the revenue line items you would like to include in the quote.
   Note: Only revenue line items which have not been included in previous quotes may be used to generate a new quote.
4. Choose "Generate Quote" from the Actions menu.




5. The quote record that opens in edit view will have all relevant fields and line items automatically populated from the revenue line item records. Make any necessary modifications, then click "Save" to preserve your changes.




## Updating Currency Rates

When saving a revenue line item in a currency that differs from the system-defined default currency, Sugar will store the conversion rate for that currency at the record level. This conversion rate is used to calculate the converted amounts when the field is set to use the system default currency (as opposed to the user's preferred currency which is explained below). To keep amounts historically accurate, the conversion rate will only update on a revenue line item provided the sales stage is not set to "Closed Won" or "Closed Lost". If the line item is in any other sales stage, the conversion rate will update under the following scenarios:

- The revenue line item undergoes a save event (e.g. mass update, manual save, etc.) and the record's currency has a different conversion rate defined in Admin > Currencies than is currently saved in the opportunity.
- An administrator updates the currency exchange rate under Admin > Currencies. This will trigger a scheduled job which updates all revenue line items saved with that currency to the new rate.

When the viewing user's profile has the Show Preferred Currency option selected, the converted amounts display in the user's preferred currency. In this case, the conversion rate used to calculate the converted amounts is drawn directly from the conversion rate at the system level rather than any conversion rate stored on the record. This means that the value will always use the current conversion rate regardless of the line item's sales stage. For this reason, the converted amount fields should not be considered historically accurate for closed revenue line items when it is using the user's preferred currency. For information about setting a user's Preferred Currency and Show Preferred Currency options, please refer to the User Profile documentation.

For more information about currency exchange rates, please refer to the Currencies documentation in the Administration guide.

Last Modified: 10/11/2016 06:35pm

# Opportunities

## Overview

Sugar's Opportunities module allows you to track individual sales and the line items belonging to those sales from start to finish. Each opportunity record represents a header for a group of revenue line items as well as relating to other important records such as quotes, contacts, etc. Each revenue line item is the prospective sale of a particular product and includes relevant sale data. Each revenue line item will typically progress through several Sales Stages until it is marked either "Closed Won" or "Closed Lost". The Opportunity record reflects the amount and expected close date of its revenue line items. Opportunities and revenue line items can be leveraged even further by using Sugar's Forecasting module to understand and predict sales trends as well as focus work to achieve sales quotas. For more information on the Forecasts module, please refer to the Forecasts documentation.

Note: If your instance is configured to use opportunities alone without revenue line items, please refer to the Opportunities documentation in the Professional Edition Application Guide. For more information about changing your opportunities model via Admin > Opportunities, please see the Opportunities Configuration documentation in the Administration Guide.

## Opportunity Fields

The Opportunities module contains a number of stock fields which come

out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

| Field | Description |
| --- | --- |
| Account Name | The account to which the opportunity belongs |
| Assigned to | The Sugar user assigned to the opportunity |
| Best | Calculated as the total of Best values of all related revenue line items, the opportunity's most optimistic total amount displayed in the system default currency or, if the viewing user has "Show Preferred Currency" enabled, in the user's preferred currency<br><br>Note: The Best value for related revenue line items in a sales stage of "Closed Lost" will not be included in the calculation. |
| Campaign | The campaign, if any, from which the opportunity originated<br><br>Note: This is an optional field as not all opportunities will have a campaign. |
| Date Created | The date the opportunity record was created |
| Date Modified | The date the opportunity record was last modified |
| Description | A description or other information about the opportunity |
| Expected Close Date | Calculated as the last expected close date of a related revenue line item, the opportunity's expected or actual close date |
| Lead Source | The source (e.g. Trade Show) from which the opportunity originated |
| Likely | Calculated as the total of Likely values |

| | |
|---|---|
| | of all related revenue line items, the opportunity's most probable total amount displayed in the system default currency or, if the viewing user has "Show Preferred Currency" enabled, in the user's preferred currency<br><br>Note: The Likely value for related revenue line items in a sales stage of "Closed Lost" will not be included in the calculation. |
| Next Step | The succeeding stage of the opportunity's sales cycle |
| Opportunity Name | The name of the opportunity |
| Status | Calculated based on the sales stages of the related revenue line items, the current status of the opportunity |
| Teams | The Sugar team(s) assigned to the opportunity record |
| Type | The type (e.g. new business, existing business) of opportunity |
| Worst | Calculated as the total of Worst values of all related revenue line items, the opportunity's least optimistic total amount displayed in the system default currency or, if the viewing user has "Show Preferred Currency" enabled, in the user's preferred currency<br><br>Note: The Worst value for related revenue line items in a sales stage of "Closed Lost" will not be included in the calculation. |

## Sales Stages

A sales stage identifies the current stage (e.g. Prospecting, Qualification, etc.) that the opportunity is in during the sales cycle. When you select a sales stage in the opportunity record, the system automatically populates the corresponding probability value (e.g. 10, 20, etc.) in the Probability (%) field. These probability values are a useful tool as it helps calculate and predict your sales forecast for a specified time period. For more information on the Forecasts module, please refer to the Forecasts documentation. Administrators have the ability to configure the

sales stage and probability values for each sales stage via Admin > Dropdown Editor. For more information on configuring the sales stages and probability values, please refer to the Developer Tools documentation in the Administration guide.

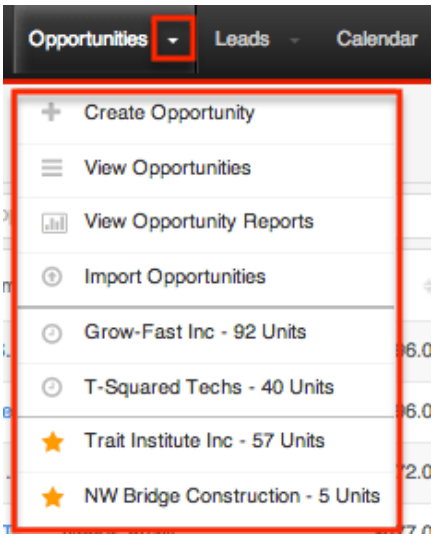
Please note that the below values are only guidelines for defining your sales stage and you can skip one or more stages based on your organization's needs.

| Sales Stage Value | Probability (%) | Description |
|---|---|---|
| Prospecting | 10 | Sales representative is reviewing and qualifying the opportunity<br><br>Note: This is the first stage of the sales process, which indicates that the opportunity with this prospect is new. |
| Qualification | 20 | Sales representative is interacting with the prospect to determine if a sales opportunity exists |
| Needs Analysis | 25 | Sales representative understands that the prospect is interested in the product(s)/service(s) and is identifying the prospect's business problems |
| Value Proposition | 30 | Sales representative is mapping the company's products and/or services to the prospect's business problems and describes the value of the solution |
| Id. Decision Makers | 40 | Sales representative identifies the decision makers necessary to close this opportunity after determining there is a match between the prospect's business problems and the company's products and/or |

| | | |
|---|---|---|
| | | services |
| Perception Analysis | 50 | Sales representative is analyzing 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 | 65 | Sales representative is delivering the proposal (i.e. price quote) to the prospect |
| Negotiation/Review | 80 | Sales representative is reviewing and negotiating the proposal with the prospect |
| Closed Won | 100 | Sales representative has won this opportunity and the client can be billed |
| Closed Lost | 0 | Sales representative has not won the business associated with this opportunity |

## Opportunities Module Tab

The Opportunities module tab is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access the Opportunities list view. You may also click the triangle in the Opportunities tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of opportunities you last viewed in the module. The Favorites menu displays the list of opportunities you most recently marked as favorites in the module.




The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|---|---|
| Create Opportunity | Opens the record view layout to create a new opportunity |
| View Opportunities | Opens the list view layout to search and display opportunities |
| View Opportunity Reports | Displays existing reports based on the Opportunities module |
| Import Opportunities | Opens the import wizard to create or update opportunities using external data |

If you do not see the Opportunities module tab in Sugar, please check the following:

- The Opportunities module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Opportunities module in the Hide Modules list, simply move it to the Display Modules list and save. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Opportunities module for your entire Sugar instance. Reach out to your Sugar administrator to have the Opportunities module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

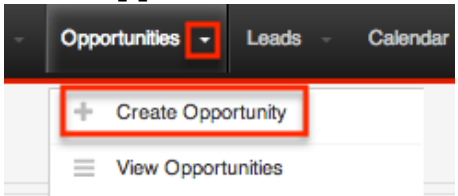
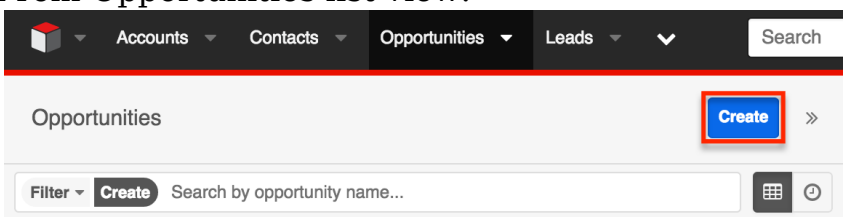
# Creating Opportunities

There are various methods for creating opportunities in Sugar including via the Opportunities module, quick create, duplication, and import. The same record view layout opens when creating the opportunity directly from the Opportunities menu as well as via the Quick Create menu and includes all of the relevant fields for your organization. Please note that administrators can configure the Record View layout via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

Each opportunity must have at least one related revenue line item record. After your opportunity has been created, you will be prompted to create one or more revenue line items for that opportunity. For more information about creating revenue line items, please refer to the Revenue Line Items documentation.

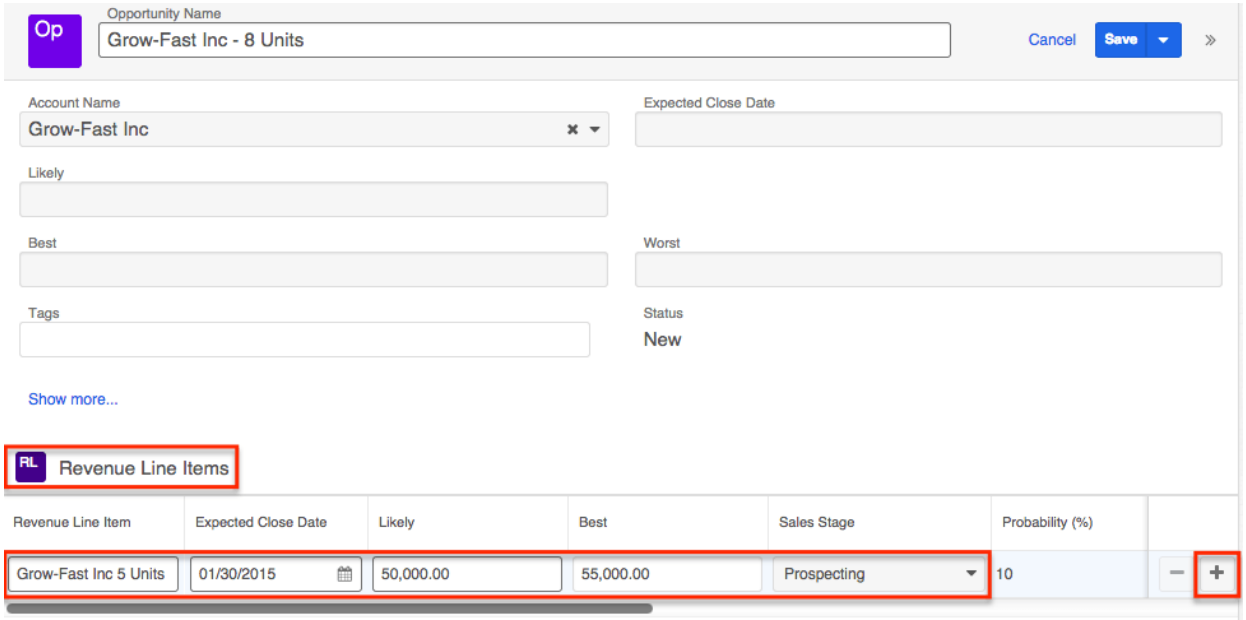
## Creating Via Opportunities Module

One of the most common methods of opportunity creation is via the Opportunities module using the Create Opportunity option in the module tab or the Create button on the list view. This opens up the record view layout which allows you to enter all of the relevant information for the opportunity. Beneath the opportunity, a subpanel appears where you can create one or more revenue line items that make up the opportunity. This allows both the opportunity and revenue line item(s) to be created simultaneously.
The following steps cover creating an opportunity and revenue line item via the Opportunities module as an example:

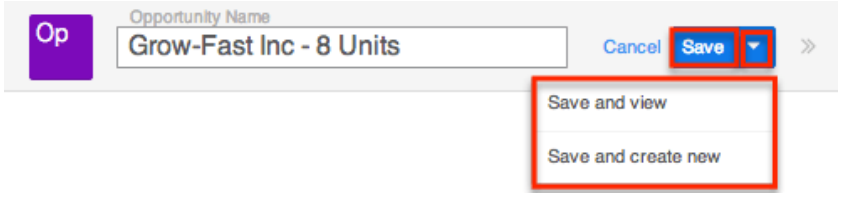
1. Click the triangle in the Opportunities module tab to open the actions menu and select "Create Opportunity". You can also click the Create button on the upper right of the Opportunities list view.
   From Opportunities module tab:
   
   
   From Opportunities list view:
   
   
2. Enter appropriate values for the fields in the record view layout. All required

fields will indicate "Required" in the field and must be completed prior to saving.

3. Go down to the Revenue Line Items create subpanel in the Opportunities record view and enter appropriate values (e.g. Revenue Line Item name, expected close date, etc.) for the fields in the subpanel.
    - Scroll left-to-right using the horizontal scroll bar on the bottom of the subpanel to view all available fields.
    - Note: The opportunity record must have at least one related revenue line item in order to save.




4. To add additional revenue line items to the opportunity, click the Plus button to the far right of the subpanel row.
    - The current Revenue Line Item row is validated when adding a new row to ensure that all required fields and data are entered properly.
    - To remove any revenue line items from the opportunity, simply click the Minus button to the left of the Plus button. Please note that you cannot remove the first revenue line item as at least one related revenue line item is required for the opportunity to save.
5. Once all the necessary information is entered, click "Save".
    - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.
    - The created revenue line item(s) will appear in the Revenue Line Items subpanel beneath the opportunity record's fields in the record view.



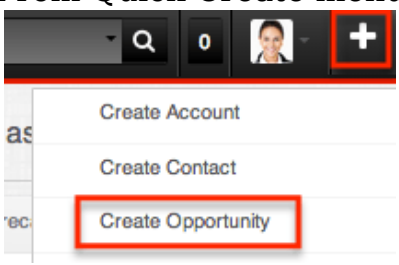
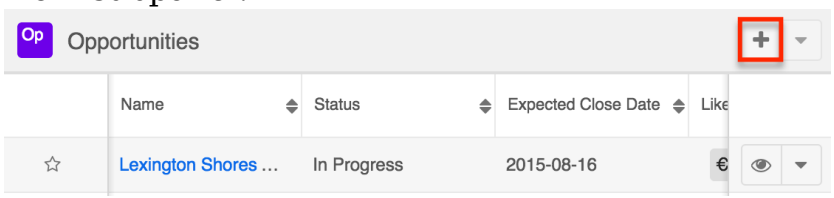
## Creating Via Quotes Module

As you interact with your client and present the quote for your products and services, you can easily create an opportunity from the Quotes detail view to better track your sales. The displayed Opportunity record view is pre-populated with the original quote's values to reflect the opportunity name, account name, expected close date, best, likely, and worst amounts. Any other fields populated will be based off the default values as they are defined in Studio for the Opportunities module. Please note that the opportunity record will automatically be associated to the quote. Also, each quoted line item of the quote will become a revenue line item associated to the newly created opportunity record. By default, the sales stage is set to "Proposal/Price Quote", the probability is "65%", the type is "New Business", and the lead source is "Self Generated". You can edit the revenue line item record accordingly if you wish to change the default values for sales stage, type, and lead source.

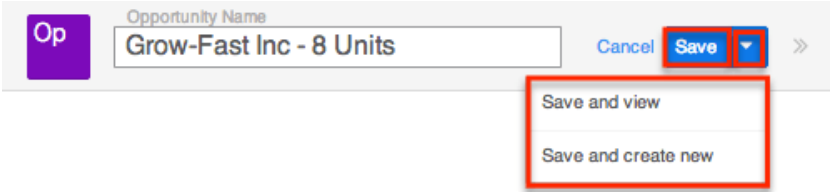
For more information on creating an opportunity from a quote, please refer to the

## Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of any Sugar page to access the menu. You can also quick create an opportunity from any Opportunities subpanel on related module records.
Use the following steps to create an opportunity via Quick Create:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Opportunity" or click the Plus button on any Opportunities subpanel on a related module's record view.
   From Quick Create menu:
   
   
   From subpanel:
   
   

2. Enter appropriate values in the fields in the record view form. All required fields will indicate "Required" in the field and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".
    - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.

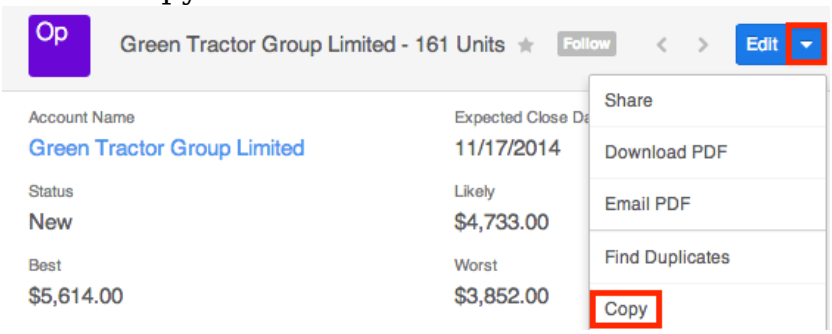



## Creating Via Duplication

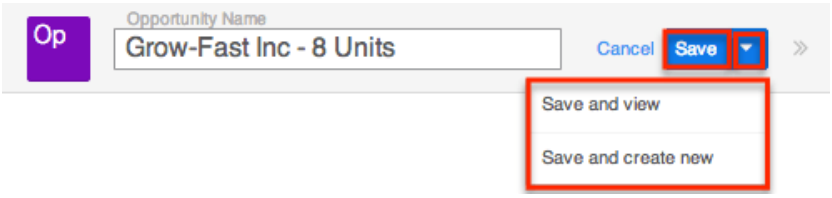
You can also create a new opportunity by duplicating an existing opportunity record. The Copy option is useful if the opportunity you are creating has similar information to an existing opportunity. Please note that existing subpanel relationships for the original opportunity record will not carry over to the duplicated opportunity record.

Use the following steps to create an opportunity by duplicating an existing record:

1. Navigate to an opportunity's record view.
2. Select "Copy" from the Actions menu.




3. The displayed record view is pre-populated with the original opportunity's values. Update the necessary fields, then click "Save".
    - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.




## Creating Via Emails

The Emails module enables users to create new opportunity records from external and imported emails using the Quick Create option. Simply click the Quick Create button above the selected email header then select "Opportunity".




A pop-up window will open with the quick create form where you can enter relevant values for the new opportunity. The name and description fields are populated by default based on the emails header, body, etc. All required fields are marked with a red asterisk and must be completed prior to saving. Once the necessary information is entered, click "Save". For more information on how to create, send, and manage emails, please refer to the Emails documentation.

Please note that the selected email will be imported, if not already, and automatically related to the new opportunity. The email record will appear within the History dashlet of the Opportunities record view.

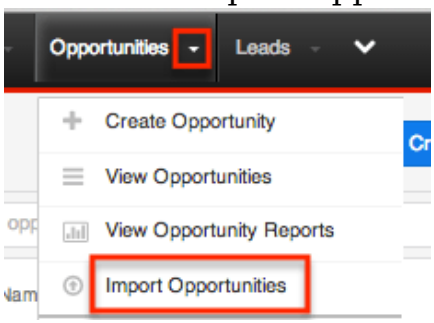
## Importing Opportunities

The import function allows you to push multiple opportunity records into Sugar using a comma (or other character) delimited file instead of creating them one-by-one. For more information on importing, please refer to the Import documentation.

Please note that a revenue line item must also be imported and related to the opportunity in order to populate the amounts (e.g. best, likely, etc.) on the opportunity record. Be sure to include the opportunity ID and amounts on the revenue line item import file.

Use the following steps to import opportunities via the Import Opportunities option:

1. Click the triangle to access the Actions menu in the Opportunities module tab and select "Import Opportunities".



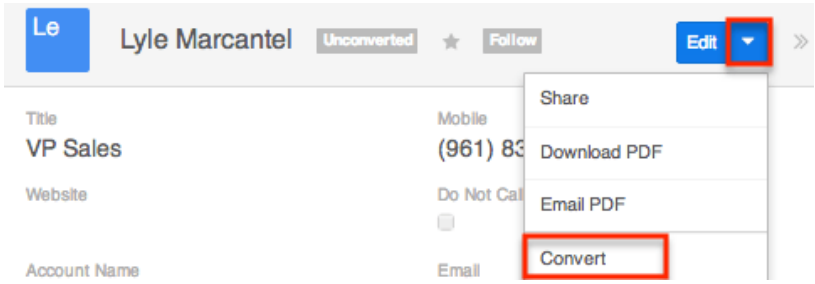

2. In Step 1, select the import file and choose "Create new records only". Click "Next".
3. In Step 2, confirm the import file properties. Click "Next".
4. In Step 3, confirm the field mappings for the import. Click "Next".
5. In Step 5, view the import results.
    - The Created Records tab will show all of the new opportunity records.
    - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
    - The Errors tab will show records that were not imported due to errors detected during import.

## Creating Via Lead Conversion

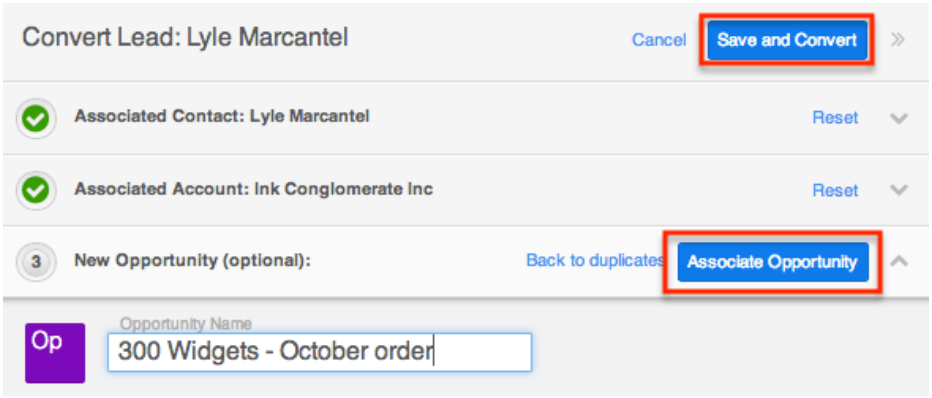
Sugar enables you to create a new opportunity record during the lead conversion process. For more information about lead conversion, please refer to the Leads documentation.

Use the following steps to create an opportunity during lead conversion:

1. Navigate to a Leads record view.
2. Select "Convert" from the Actions menu.




3. Complete the Contact and Accounts portions and click "Associate Contact" and "Associate Account" to progress to the Opportunities section.
4. Enter the relevant information for the opportunity then click "Associate Opportunity" followed by "Save and Convert".




## Viewing Opportunities

There are various options available for viewing opportunity records in Sugar including via Opportunities list view, Opportunities record view, Opportunities Recently Viewed menu, dashlets, and reports. Please note that you will only be able to see opportunity records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

### Viewing Via List View

The Opportunities list view displays all opportunity records meeting the current search criteria. Users can also access the activity stream to view posts specific to the opportunity record. For more information on the Record View's Activity Stream, please refer to the Activity Stream section of this documentation. The Intelligence pane can also be viewed to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's forecasting and other data. For more information regarding the Record View's Intelligence Pane, please refer to the Intelligence Pane section of this documentation. To access the list view, you can simply click the Opportunities module tab. While list view shows key opportunity fields, you can click the opportunity's name to open the record in record view. For more information on viewing opportunities via list view, please refer to the Opportunities List View section of this documentation.

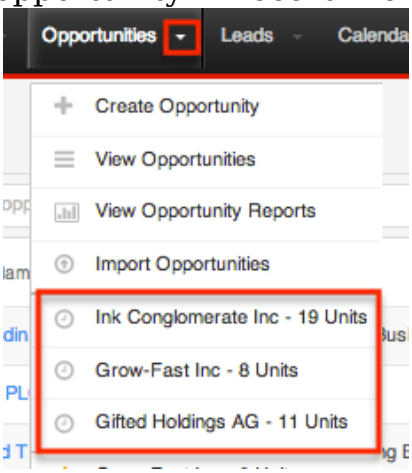
### Viewing Via Record View

The Opportunities record view displays thorough opportunity information including all relevant opportunity fields followed by subpanels of the opportunity's related records belonging to various modules. Users can also access the activity stream to

view posts specific to the opportunity record. For more information on the Record View's Activity Stream, please refer to the Activity Stream section of this documentation. The Intelligence pane can also be viewed to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's forecasting and other data. For more information regarding the Record View's Intelligence Pane, please refer to the Intelligence Pane section of this documentation. The record view can be reached by clicking an opportunity record's link from anywhere in the application including from the Opportunities list view. For more information on viewing opportunities via the record view, please refer to the Opportunities Record View section of this documentation.

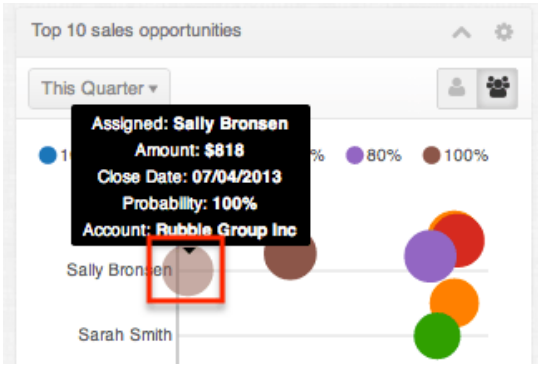
## Viewing Via Recently Viewed

As you work, Sugar will keep track of which opportunities you have recently viewed. Click the Actions menu in the Opportunities module tab to see a list of your most recently viewed opportunities and click each name to open the opportunity in record view.



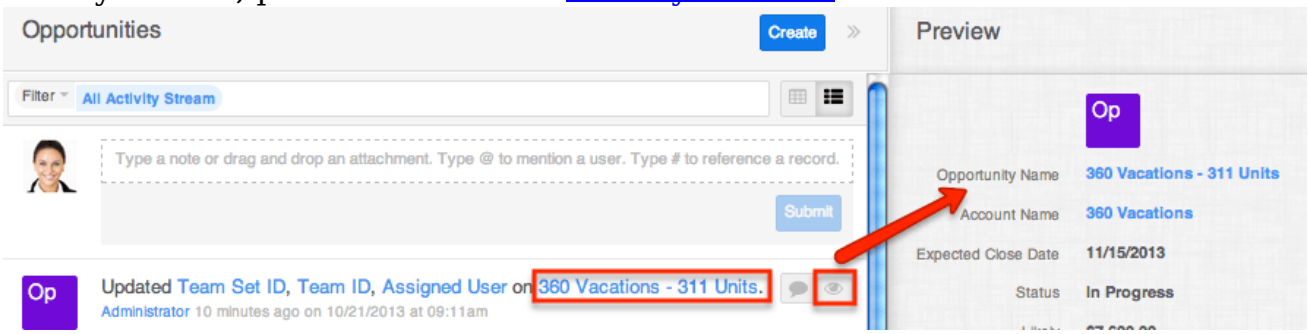

## Viewing Via Dashlets

Sugar Dashlets allow users to get a quick view of various records, activities, reports, etc. Dashlets may be added to a user's Home page or to the intelligence pane of any module. You can view opportunity information in opportunity-based dashlets such as "My Closed Opportunities". Clicking an opportunity's name or bubble from any dashlet will open the Opportunities record view while hovering on the bubble will display key details in a tooltip. For more information on using dashlets and viewing opportunity records via dashlets, please refer to the Intelligence Pane documentation.



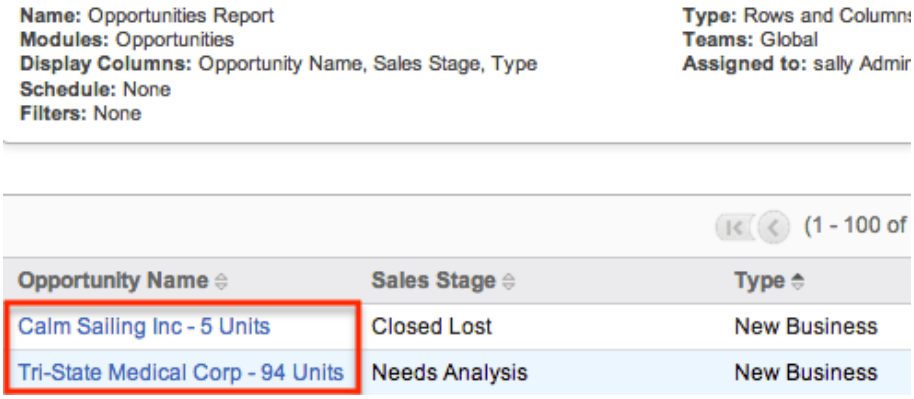

## Viewing Via Activity Streams

The activity stream allows users to view each other's activities in Sugar and the actions that took place for the various modules (e.g. Opportunities, etc.) via posts (record post, user post, etc.). You can access the Opportunities record view by clicking the opportunity's name referenced in the post. You can also preview the opportunity record's detail directly from the activity stream by clicking the Preview button to the right of the post. For more information on viewing records via the activity stream, please refer to the Activity Streams documentation.

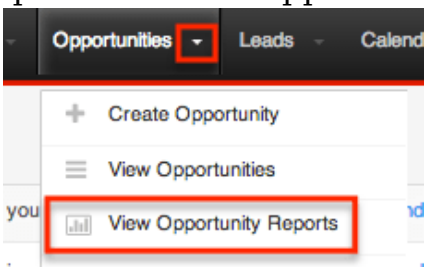



## Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding opportunities and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the opportunity's record view by clicking the opportunity's name in the report results. Please note that you can only directly access opportunity record views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation.




In addition to navigating to the Reports module and finding or building relevant reports, you can use the Opportunities module tab's View Opportunity Reports option to see all opportunity-based reports to which you have access.




Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

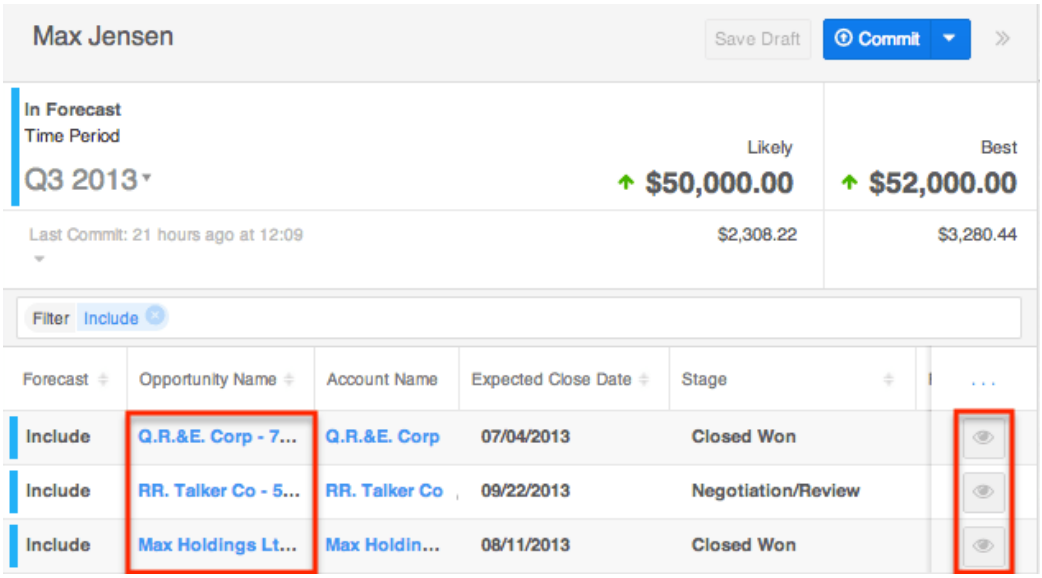
## Viewing Via Forecasts

Sugar's Forecasts module incorporates opportunity records to build forecasting worksheets and predict sales. Forecasts are based on the monetary value of the opportunities in Sugar. Users can work towards sales quotas at the individual, team, and sales organization level.Before users can access the Forecasts module to begin building forecasting worksheets, a user with administrator access must configure the Forecasts module with the organization's desired Time Periods, Ranges, and Scenarios. For more information on setting up the Forecasts module, please refer to the Forecast Configuration documentation in the Administration Guide.

Based on the chosen filters (include, exclude, etc.), you will see all or some of your assigned opportunities for the currently selected time period. The Forecast column displays an automatic category indicating whether or not the opportunity's amounts are included in the totals for the specified time period . You can work directly with your opportunity records by inlineediting their probabilities and amounts from the Forecasts module or by clicking the Name field to open a record in the Opportunities module where you can make additional edits. For more

information on editing and managing forecasts, please refer to the Forecasts documentation.

You can also view the opportunity record's details directly from the forecast worksheet by clicking the Preview icon to the far right of each opportunity's row. For more information on how to preview records, please refer to the Preview section of this documentation.




## Searching Opportunities

The Opportunities list view includes a module search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Opportunities list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.

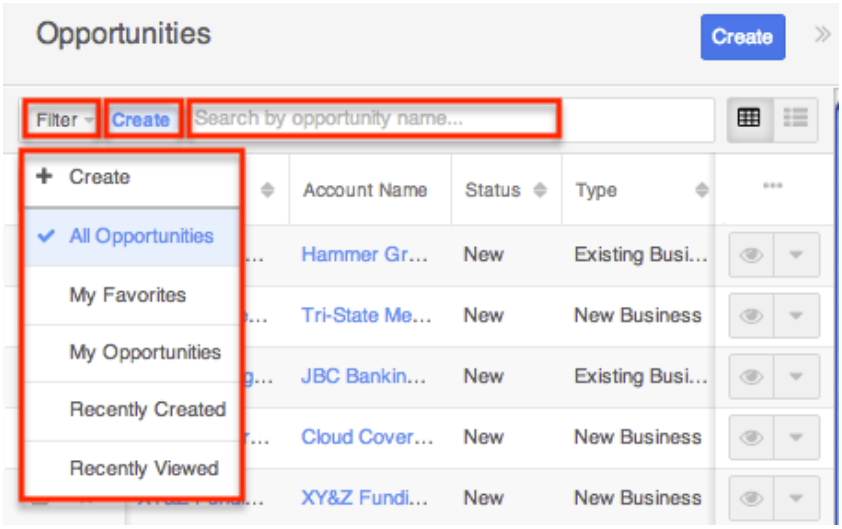
For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

### Module Search

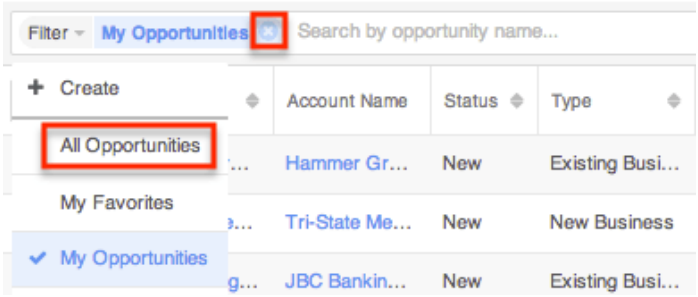
Module search enables users to easily search by opportunity name within the

Opportunities module and pull up matching records in the list view. The search also provides a Filter option which can be used in combination with the open Search box to narrow your search further using the available options as follows:

- Create : Create a new custom filter which you can use to filter your search
  - Note: You can also click "Create" to the right of the Filter option.
- All Opportunities : Returns all records in the module to which you have access
- My Favorites : Returns only records you have marked as favorites
- My Opportunities : Returns only records assigned to you
- Recently Created : Returns only records you created in the module within the last 7 days
- Recently Viewed : Returns only records you have viewed in the module within the last 7 days




When you choose a filter, Sugar will return opportunities which match both the selected filter and any name provided in the "Search by opportunity name..." bar in the filtered list view results. For example, if you select "My Opportunities" in the Filter options and enter an opportunity name, Sugar will only return opportunity records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search bar. To see all opportunity records to which you have access, simply select the All Opportunities option in the filter and remove any text from the search bar. You can also click the Clear icon within the selected filter option (e.g. My Opportunities) in the Search bar to clear the filter and pull up all list view search results. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.




Please note that you will only be able to see opportunity records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Administrators can configure what fields appear on the Opportunities Module Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

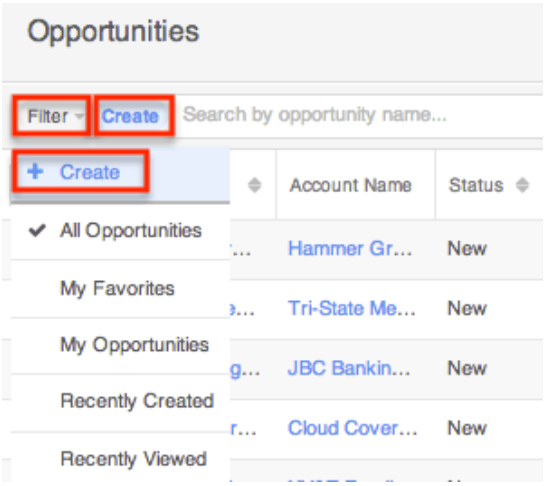
## Creating a Filter

Users can also create new filters via the Create option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the Opportunities list view. You have the option to add multiple fields to your new filter by clicking the Plus button to the right of the filter selection dropdown lists and set select operators along with their value(s). A filter's criteria need to be true for a record in order for it to appear in the list view search result. Additionally, filters with no specified values may be saved as a custom filter to act as a filter template when a user often searches using the same fields but with varying values. Please note that only fields you have view access for will appear in the Filter list when creating a search filter.

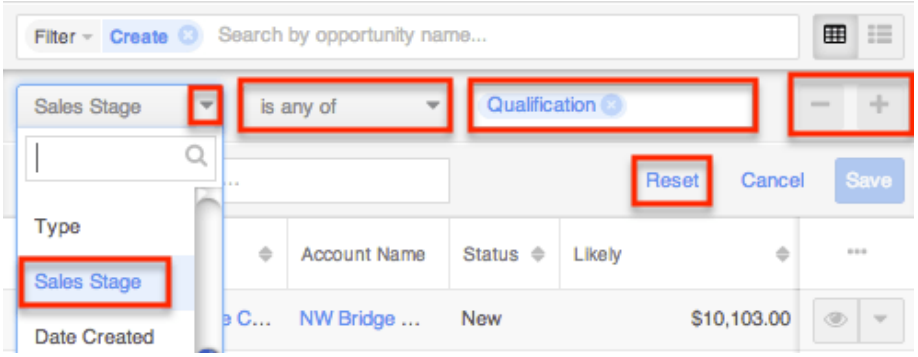
When you run a search using a created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.

The following steps cover creating a new Sales Stage filter as an example:

1. Click the Filter option on the Opportunities search bar then select "Create".
    - You can also click "Create" to the right of the Filter option.




2. Select the field you wish to add to your filter as well as the condition and matching criteria.
    - Note: Only fields you have view access for will be available to add in the Filter list.
3. To add additional fields to the new filter, click the Plus button to the right of the filter.
    - To remove fields from the new filter, click the Minus button to the right of the filter.
    - To clear any filter values (e.g. Qualification), simply click the "x" next to the value or select "Reset" to the left of the Save button.



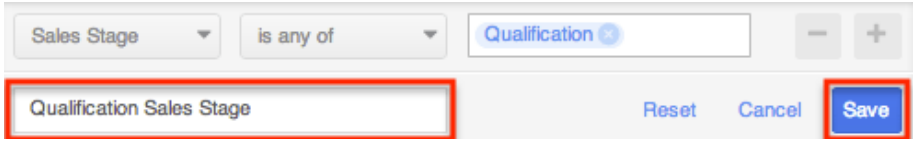

The list view will automatically display results matching your filters as you create and modify the criteria.

## Saving a Filter

Saving a filter will preserve the chosen fields as well as the condition(s) of the matching value(s). Additionally, it will allow users to easily select previously created and saved filters from the Filter options.

The following steps cover saving a new search by Name filter as an example:

1. Create a new filter to perform a search on your desired fields.
2. Enter in a name for the new filter (e.g. "Qualification Sales Stage").




3. Click "Save" to add this filter to the module's Filter options.

## Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search is used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.




To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

# Opportunities List View

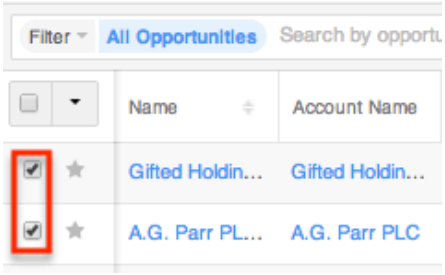
The Opportunities list view displays all opportunity records meeting the current search criteria and to which your user has access. You can view the basic details of each opportunity within the field columns. Please note that you will only be able to

see opportunity records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

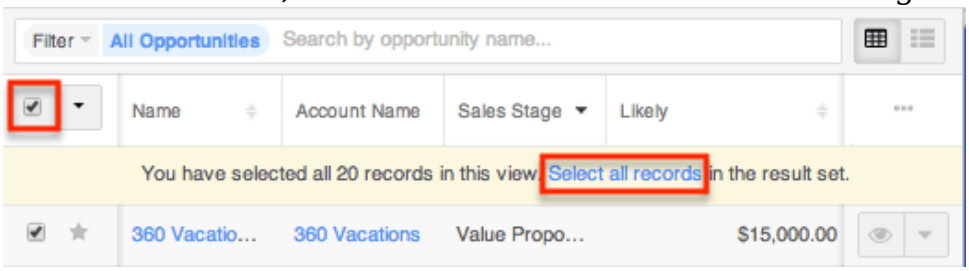
Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Checkbox Selection

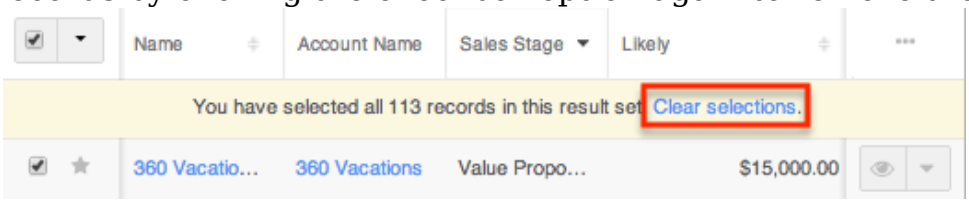
You can perform several actions on opportunity records directly from the list view by first selecting the desired records. To select individual opportunity records on the Opportunities list view, mark the checkbox on the left of each row.




To select all opportunity records displayed on the current set of list view results, click the checkbox to the left of the Actions menu. A dialog will appear below the list view column headers indicating that you have selected all records on the list view's current results set (e.g. 20). To select all records matching the current search results set, click "Select all records" in the dialog.

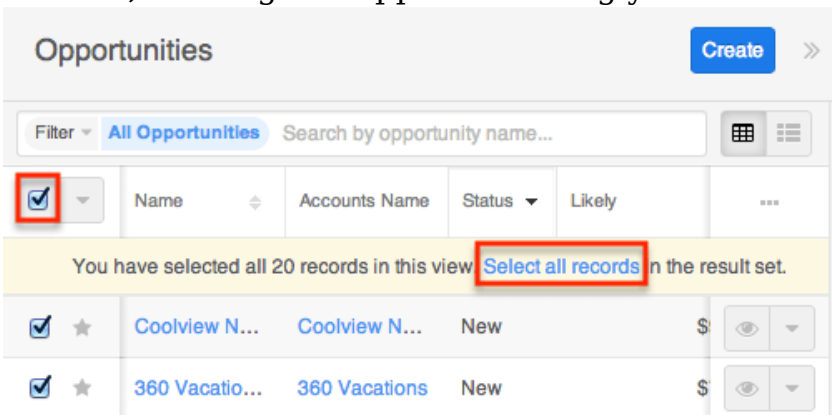



If you wish to clear the selection for all records on the list view result set, simply click "Clear selections" in the dialog. You can also clear the selections for all records by clicking the checkbox option again to remove the check marks.

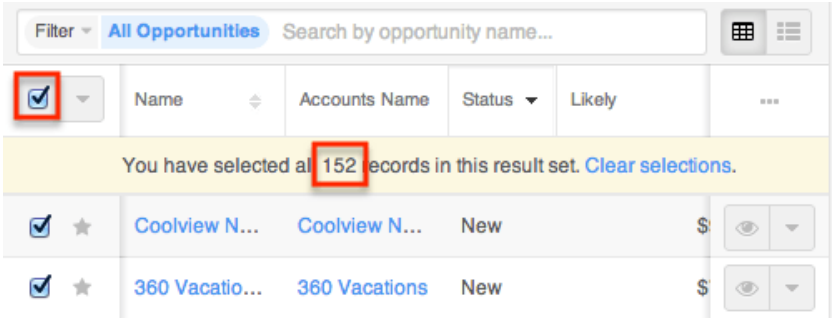


## Total Record Count

You can view the total record count on the Opportunities list view by selecting all records displayed on the current set of list view results. Once the records are selected, a dialog will appear allowing you to select all records in the results set.

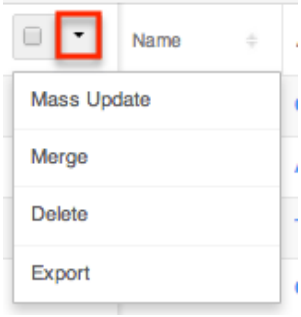



The total count of all records on the list view result set will appear in the dialog.




## Mass Actions Menu

The Mass Actions menu to the right of the checkbox option allows you to perform various actions on the currently selected records.



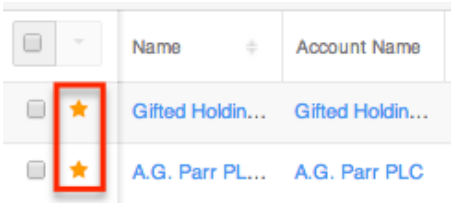

The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
| --- | --- |
| Mass Update | Mass update two or more opportunities |

| | |
|---|---|
| | at a time |
| Merge | Merge two or more duplicate opportunities |
| Delete | Delete one or more opportunities at a time |
| Export | Export one or more opportunities to a CSV file |
| Recalculate Values | (Available in certain circumstances) Updates calculated values to reflect changes to calculated fields made in Studio |

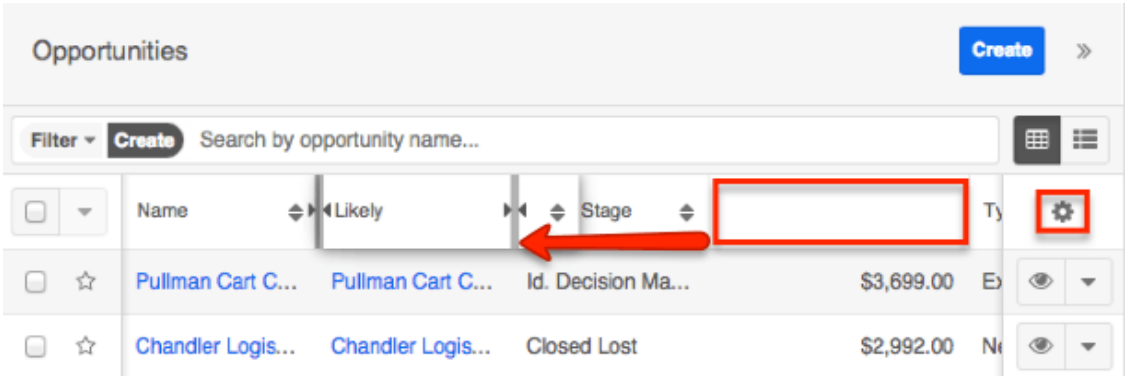
## Favorite Designation

Users have the option to mark opportunity records as favorites via the list view as well as the record view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the Opportunities module tab. In the Opportunities list view, the star on the left of each opportunity's row is orange once marked to indicate a favorite opportunity. For more information on how to mark records as favorites, please refer to the Favoriting Opportunities section of this documentation.




## Column Reordering

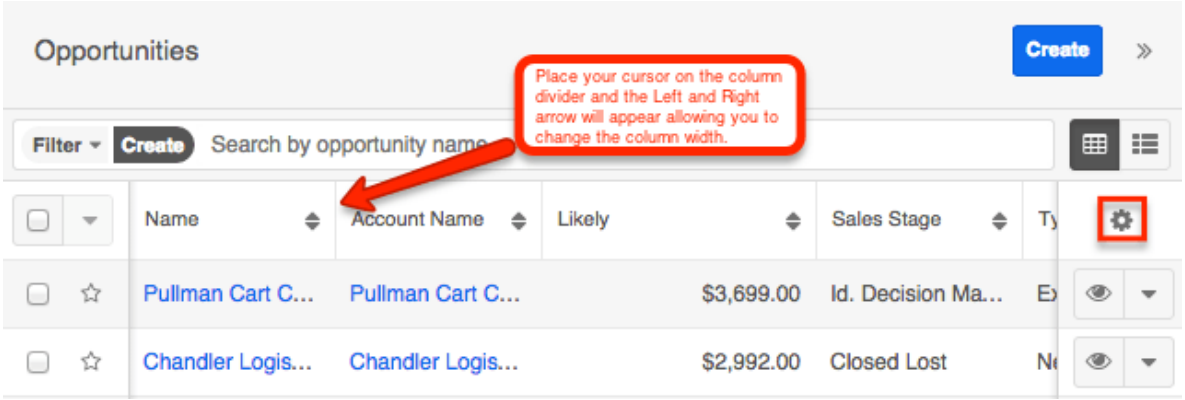
List view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the default column order.




## Column Resizing

Users can easily adjust the size of columns in the Opportunities list view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the current list view is different from the default column width. Changes to the column width made by administrators in Studio are only respected if the user has not resized the specific column in the list view. The column size set by the user will supersede the default column width configured in Studio until the user resets the list view back to the default widths. For more information on how admins can set column widths, please refer to the Studio documentation in the Administration guide.

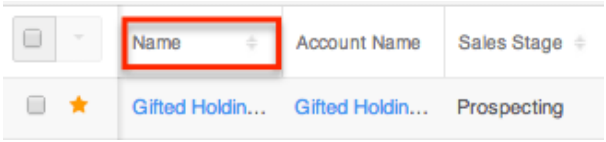
Note: Sugar enforces a minimum width for currency fields (e.g. Best, Likely, etc.) in list view columns which prevents the columns from being collapsed beyond this limit.




## Column Sorting

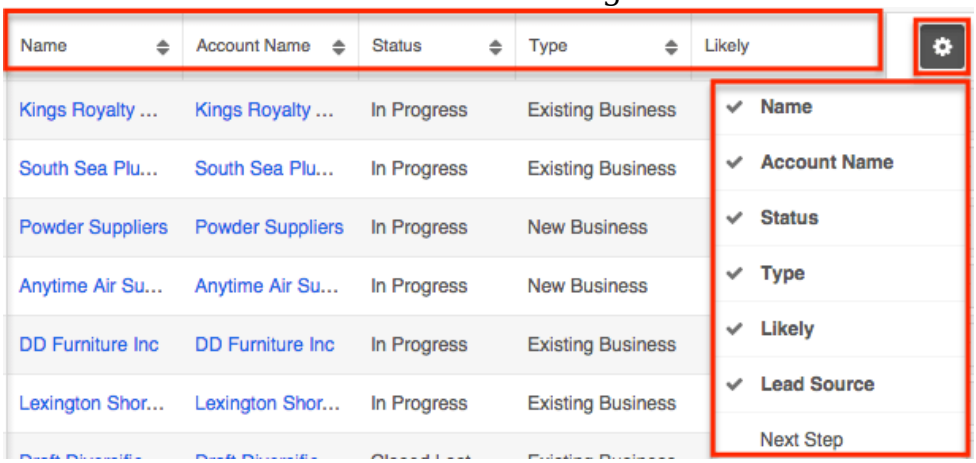
List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows.

Note: List views may only be sorted by one column at a time and cannot be sorted by custom relate fields.



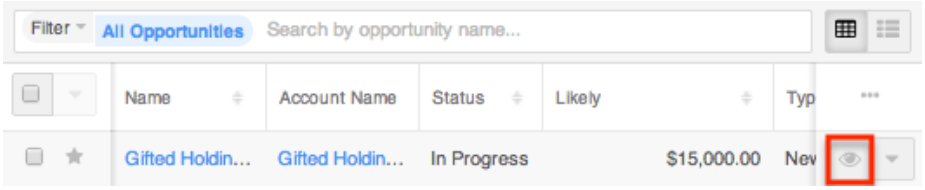

## Column Selection

Sugar gives users the ability to personalize the list view by specifying which fields they want to be displayed in the list view. You can click the Column Selection icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column on your list view. Please note that administrators have the ability to configure what fields are available to display in the list view via Admin > Studio. For more information on configuring fields to display in the list view, please refer to the Studio documentation in the Administration guide.

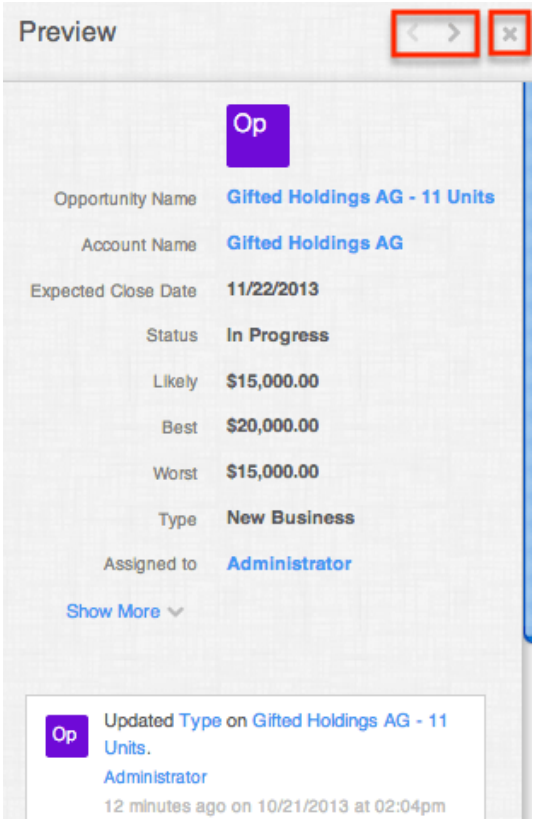



## Preview

Users can view a record's details directly from the Opportunities list view by clicking the Preview icon to the far right of each opportunity's row.

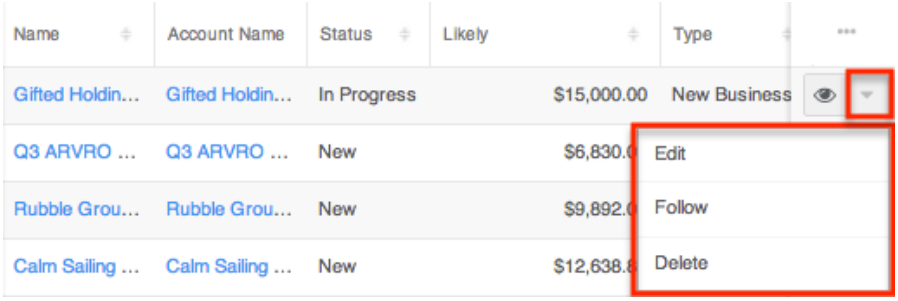


The record's data will display to the right of the list view providing key information regarding the record as well as the related activity stream information. On the upper right of the intelligence pane, there is a Left and Right arrow button that allows you to scroll through the list view's current search results by previewing the next or previous record. To close the preview, simply click the "X" on the upper right of the intelligence pane.




## Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to edit, follow, or delete specific records directly from the list view.



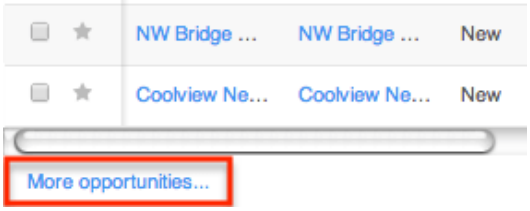

The options in the Record Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|

| | |
|---|---|
| Edit | Edit this opportunity |
| Follow | Follow this opportunity |
| Delete | Delete this opportunity |

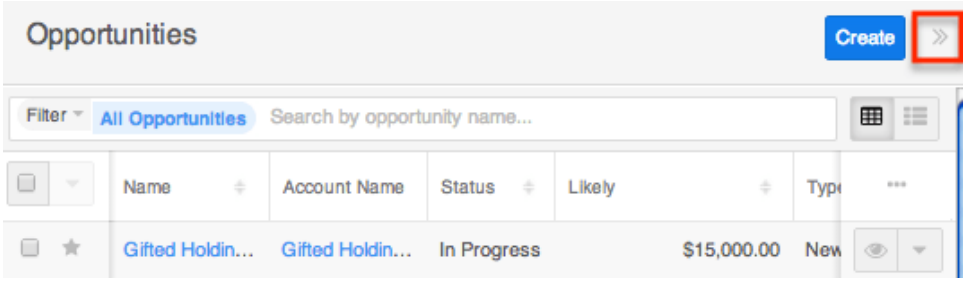
## More Opportunities

The list view loads an initial number of records meeting the current search criteria with the option to show additional results at the user's request. By default, Sugar displays 20 records per list view results set, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide. To load the next set of list view results, simply click the More Opportunities link at the bottom of the list view.




## Right Hand Side Drawer

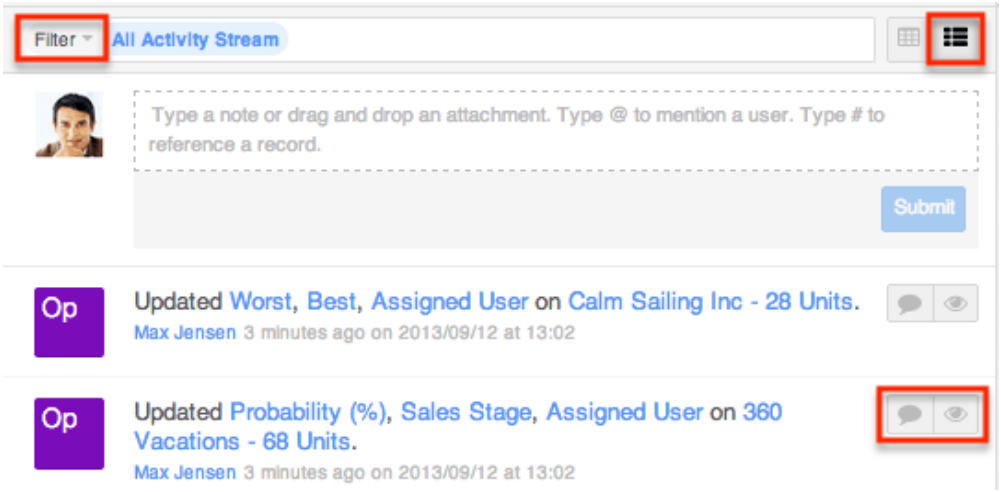
On the upper right of the Opportunities list view there is a double arrow icon which allows users to expand the list view to the full screen width. The intelligence pane to the right of the list view will be hidden when the list view is expanded. To reduce the list view's width and reveal the intelligence pane, simply click the double arrow icon again.




## Activity Stream

The Opportunities module's activity stream displays user posts made on the Opportunities module and record posts relevant to an individual opportunity record. To view the module's activity stream, simply click the Activity Stream button to the right of the list view's search bar. For more information on how to add posts to the activity stream, please refer to the Activity Streams

documentation. You can add comments to posts using the comment button to the far right of each post. You can also preview the record referenced in record posts by clicking the Preview button to the right of each post. The activity stream can be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box and selecting the desired message type.

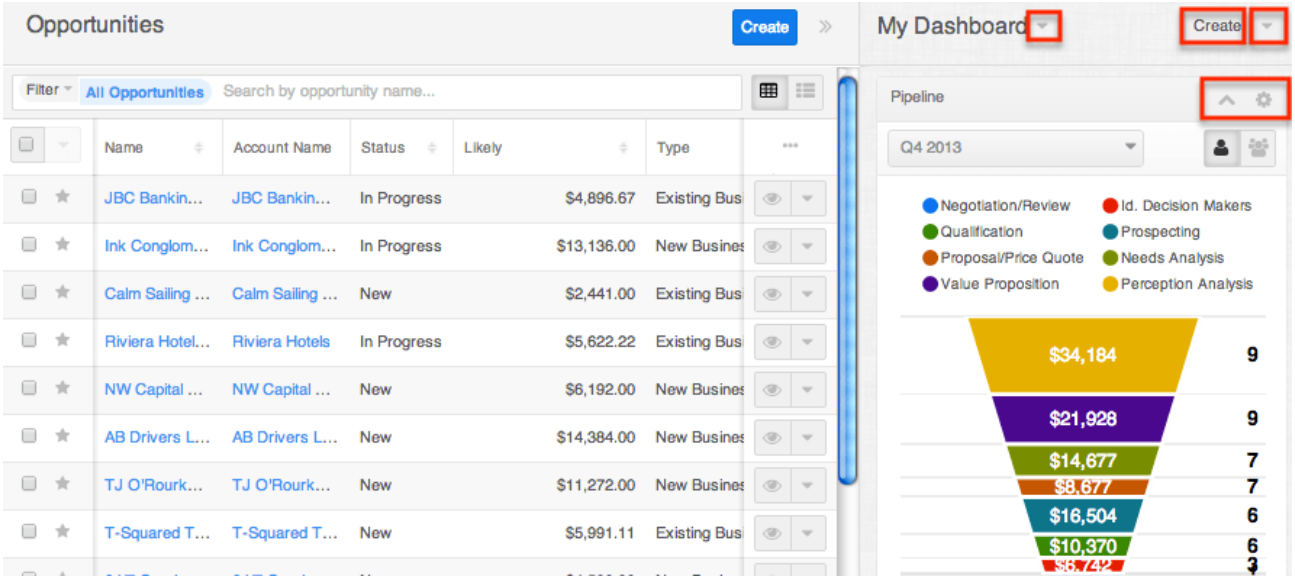



## Intelligence Pane

An intelligence pane displays to the right of the Opportunities list view and provides users with valuable record information via various dashlets. The Help dashboard normally displays by default along with the List View Help dashlet and Learning Resources dashlet. The List View Help dashlet provides users with a brief introduction to the module along with a link (e.g. Opportunities documentation) to the corresponding documentation in the Application guide. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may create other dashboards for use with the Opportunities module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets (e.g. My Accounts, etc.) to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do no wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Opportunities module. For more information on editing, creating, and rearranging dashboards

and dashlets, please refer to the Intelligence Pane documentation.



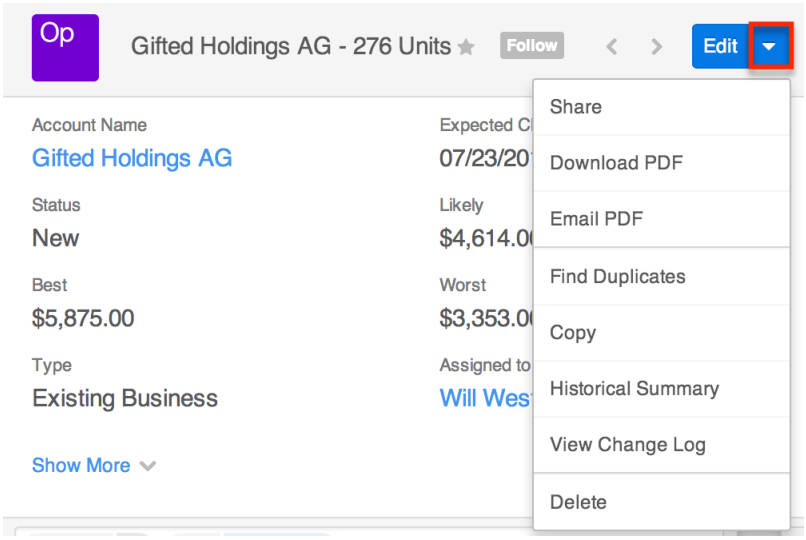

## Opportunities Record View

The Opportunities record view displays thorough opportunity information including all relevant fields. Beneath the fields you can toggle between viewing an opportunity's subpanels of related records (Contacts, Leads, etc.) and the opportunity's activity stream. The record view can be reached by clicking an opportunity record's link from anywhere in the application including from the Opportunities list view.

Please note that you will only be able to view an opportunity record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Users with administrator or developer access have the ability to change the record view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

### Actions Menu

The Actions menu on the top left of each opportunity's record view allows you to perform various actions on the current record.



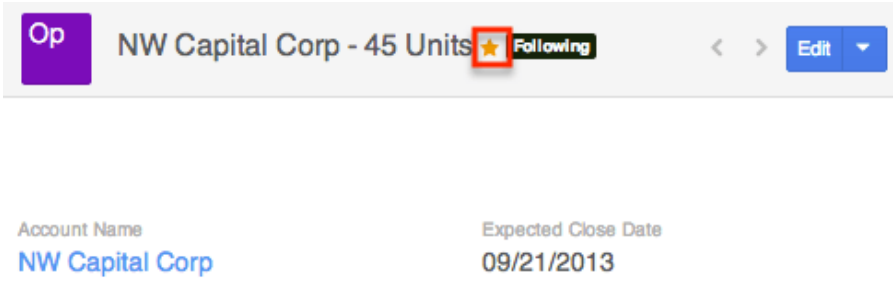

The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this opportunity |
| Share | Share a link to this opportunity via email |
| Download PDF | Download opportunity information as a PDF file |
| Email PDF | Email opportunity information as a PDF attachment |
| Find Duplicates | Locate potential duplicates of this opportunity |
| Copy | Duplicate this opportunity |
| Historical Summary | View a historical summary of activities (e.g. calls, meetings, etc.) related to this opportunity |
| View Change Log | View a record of changes to this opportunity |
| Delete | Delete this opportunity |

## Favorite Designation

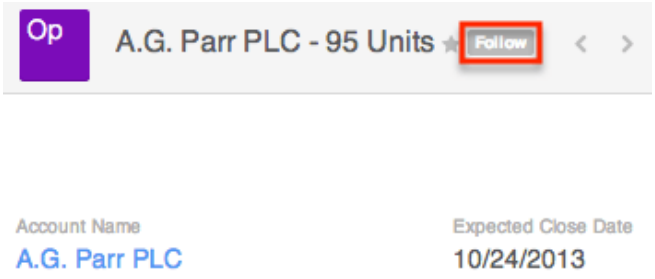
Users have the option to mark opportunity records as a favorite via the record view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the Opportunities module tab. In the Opportunities record view, the star on the right of the opportunity's name is orange once favorited. For more information

on how to mark records as favorites, please refer to the Favoriting Opportunities section of this documentation.



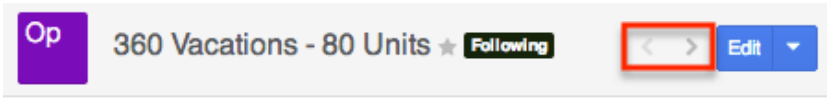

## Following Designation

Users also have the option to follow opportunity records via the record view or list view. This allows users to view record posts from followed opportunities on their Home page and Opportunities list view activity streams. Each user can personalize their activity stream by viewing posts for records that are most important to them. From the record view, users may follow or unfollow opportunities to which they have access using the Follow button to the right of the opportunity's name. For more information on how to mark records to follow via the list view, please refer to the Records Actions Menu section of this documentation. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. If you wish to stop following a specific opportunity record, click the Following button to revert it to gray. Should a user lose access to a record in Sugar, they will automatically stop following that record.




## Next or Previous Record

On the upper right of the Opportunities record view, there are two buttons that allow you to page through each opportunity in the Opportunities list view's current search results. Clicking the Left arrow button displays the previous opportunity of the current search results while clicking the Right arrow button displays the next opportunity of the current search results.

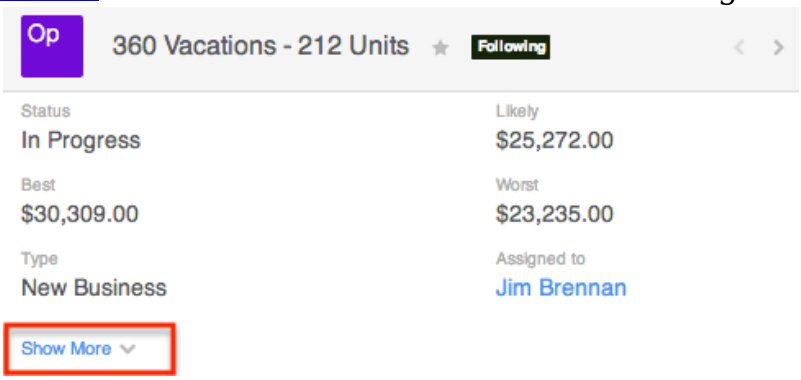






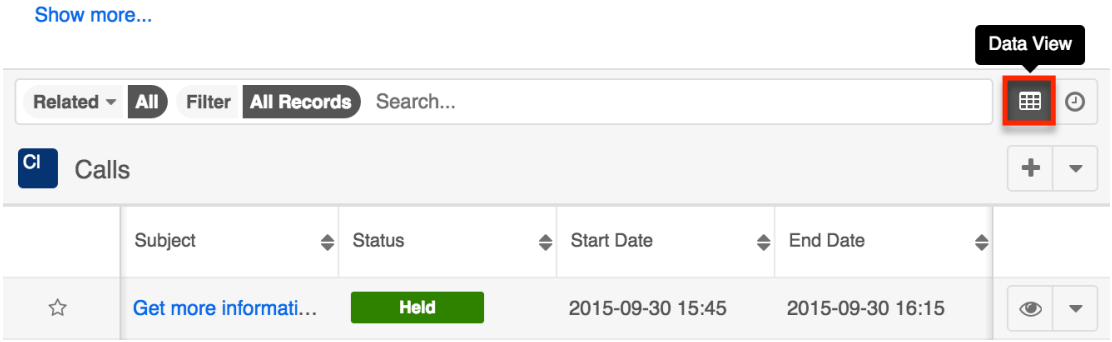
## Show More

The Opportunities record view typically display a few key fields (e.g. sales stage, expected close date, etc.) on the business card panel with the option to view more fields by clicking the Show More link on the bottom left. Please note that administrators can configure what fields appear on the business card panel via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.



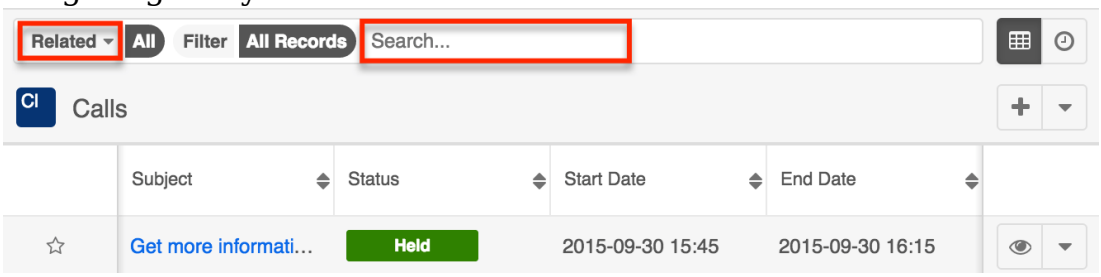

## Subpanels

Beneath an opportunity record's fields are subpanels containing related records from various modules. Selecting the Data View button will display the subpanels rather than the record's activity stream.

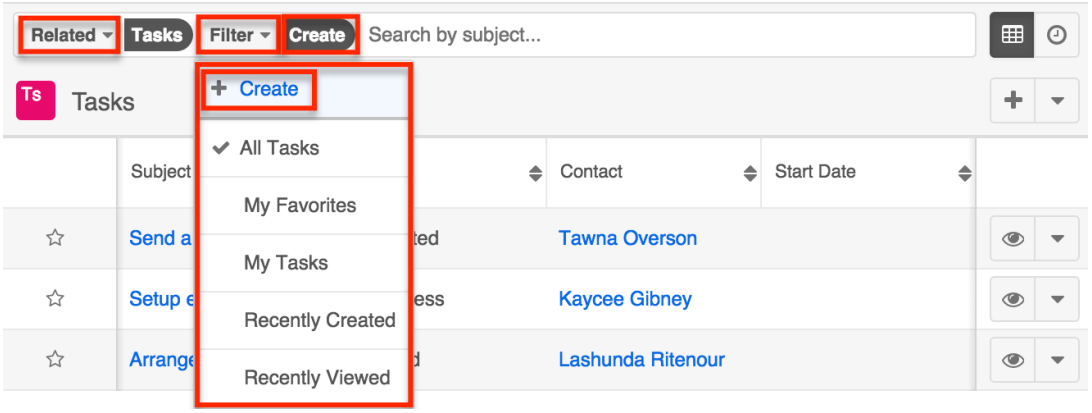



## Filter Options

While in Data View, all of the opportunity record's related records will be displayed beneath the opportunity record's fields. Users have the ability to search for records which appear in the subpanels as well as filter the view to only display a specific module (e.g. Leads, Contacts, etc.). To locate a record by name, enter the keyword into the Search bar, and the subpanel(s) with the matching record(s) will appear below. To filter, simply click the Related option to the far left of the Search bar and select the module whose subpanel you wish to view. Filter and search may be combined to only display matching records within a selected module. To see all subpanels to which you have access, simply select "All" in the Related options and remove any text from the search bar. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the page. Returning to the page will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.



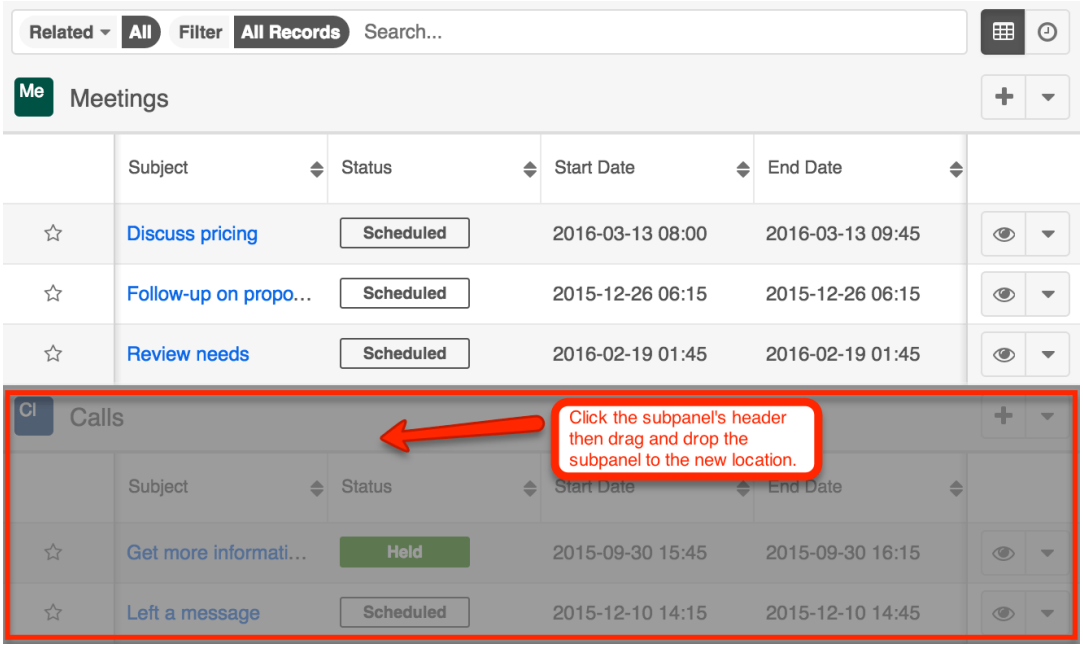

When a Sidecar module (e.g. Contacts, Leads, Tasks, etc.) is selected from the Related options, you have the option to filter the related subpanels further using one of the available options (e.g. My Favorites, Recently Created, etc.). Please note that you can also create custom filters for related Sidecar modules. Once the related module (e.g. Contacts) is selected, either click the Filter option and select "Create" or click "Create" to the right of the Filter option. For more information on creating a related records filter, please refer to the Creating a Related Records Filter section of the Search documentation.




Reordering Subpanels

Users can easily move subpanels to a new location on the record view by dragging

and dropping the subpanel's header. The new subpanel order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared.




## Related Record Subpanels

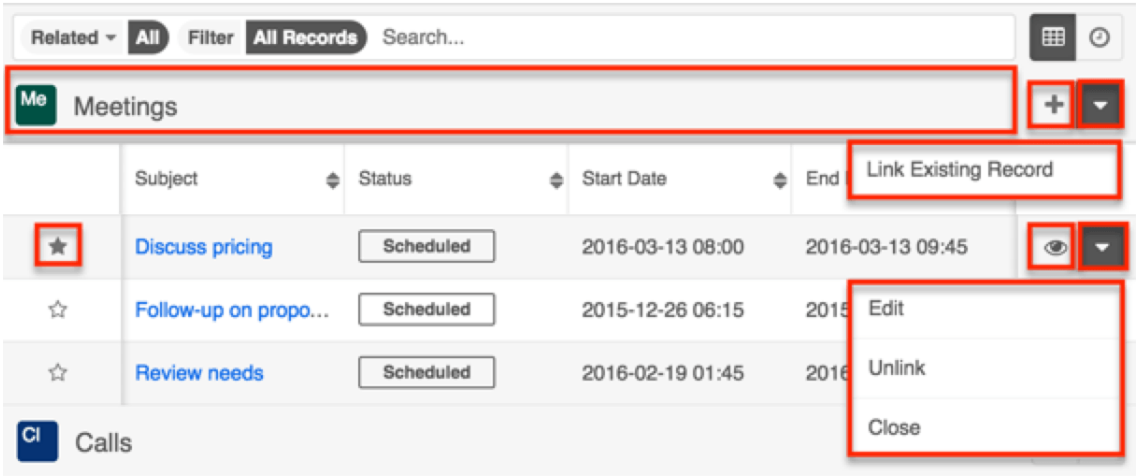
The most common type of subpanels displayed on an opportunities record view contain the opportunity's related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. For example, an opportunity may be related to only one account but related to multiple contacts. This means that the related account will be displayed amongst the opportunity's fields while contacts will be displayed in a subpanel beneath the fields.

Users with administrator or developer access have the ability to change the fields (e.g. Name, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.

Related record subpanels allow the following operations to be performed:

- To view the details of a related record, click the record's name in the subpanel to open it in record view.
- To relate an existing record to the opportunity, choose "Link Existing Record" from the subpanel's Action menu, then locate and select the desired record. Please note that the Link Existing Record option is not available when the relationship is required in the related module (e.g. Revenue Line Items).

- To relate a new record to the opportunity, click the Plus button to the left of the Actions menu, then complete the record view layout and click "Save".
- To inline edit the record directly from the subpanel, choose "Edit" from the Actions menu on the far right of the record's row and click "Save" to preserve the change.
- To delete the opportunity's relationship to a record, choose "Unlink" from the Actions menu on the far right of the record's row. This removes the relationship but does not delete the record itself. Please note that the Unlink option is not available when the relationship is required in the related module (e.g. Revenue Line Items).
- To mark the record as a favorite, click the star icon to the left of the desired record's row.
- To collapse or expand the subpanel, click anywhere on the subpanel's header.
- To change the column size in the subpanel, place your cursor on the column divider and when the Left-and-Right arrow appears, click and drag the column to the desired size. For more information on resizing columns, please refer to the Column Resizing section of this documentation.
    - Sugar enforces a minimum width for currency fields (e.g. Best, Likely, etc.) in list view columns which prevents the columns from being collapsed beyond this limit.
    - Note: The subpanel column width will not be preserved when you navigate away from the page.




Emails Subpanel

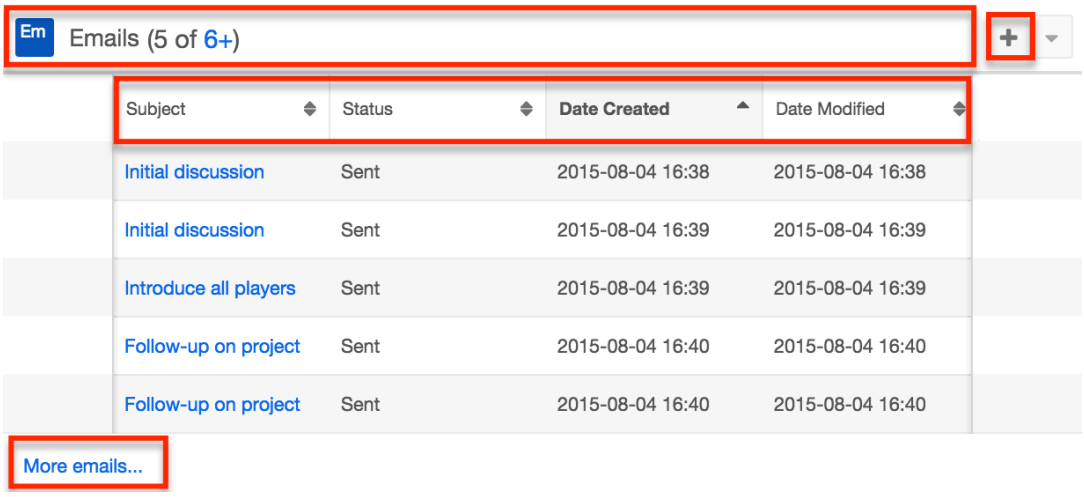
The Emails subpanel in the Opportunities module displays both emails implicitly and explicitly related to the opportunity record in addition to emails from its related contact records. Emails in Sugar are implicitly related to records in Sugar that match an email address in the From, To, or Cc fields in the email. This implicit relationship is made for emails sent from Sugar as well as any email imported into Sugar via Inbound email accounts or email archiving. While composing an email or relating an existing email to a record, users have the ability to set an explicit

relationship via the flex relate field by Relating Emails. This allows the email to be explicitly related to a single record from one of many modules.

Note: Administrators can enable or disable emails from related contacts from appearing in the Emails subpanel and History dashlet via Admin > Related Contacts Emails. For more information regarding enabling and disabling related contacts emails, please refer to the Related Contacts Emails section of the Emails documentation in the Administration guide.

The Emails subpanel allows the following functions to be performed:

- To view the details of an email, click the subject in the subpanel to open it in detail view.
- To collapse or expand the subpanel, click anywhere on the subpanel's header.
- Click "+" to create a new email that will have an implicit relationship with this record.
- Sort the emails by Subject, Status, Date Created, Date Modified, or Assigned User.
- Click "More emails" to see any additional emails hidden by the default view.
- To change the column size in the subpanel, place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. For more information on resizing columns, please refer to the Column Resizing section of this documentation.
    - Note: The subpanel column width will not be preserved when you navigate away from the page.




Revenue Line Items Subpanel

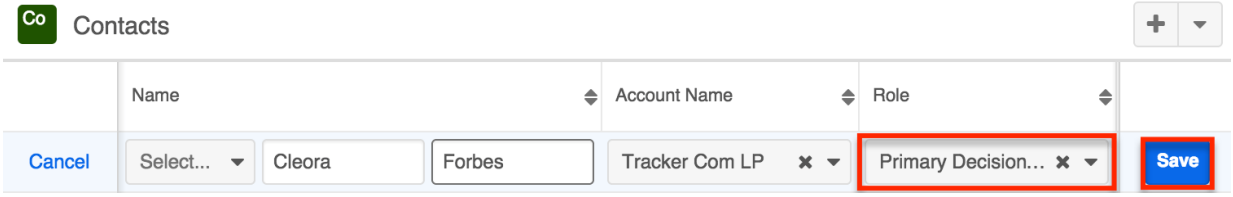
The Revenue Line Items subpanel contains all line items which make up this opportunity. Every opportunity must have one or more related revenue line items.

Please note that the related revenue line item(s) in the subpanel determine the value for certain Opportunity fields (e.g. Status, Expected Close Date, etc.). The opportunity's Status field will be "New" until a revenue line item is added. It will then remain "In Progress" until all of the related revenue line items are closed. If any of the line items are "Closed Won" once all line items have been closed, then the parent opportunity will also be marked "Closed Won". If all related revenue line items are "Closed Lost", then the opportunity will also be marked "Closed Lost". The opportunity's Expected Close Date field will automatically reflect the latest close date of all of its related revenue line items. Throughout the opportunity's life cycle, the opportunity's amount fields (Likely, Best, Worst) will be automatically populated as the total of the corresponding fields on its related revenue line items.

A quote can also be generated from one or more of an opportunity's revenue line items from this subpanel. For more information, please refer to the Generating a Quote section of this documentation.

### Contacts Subpanel

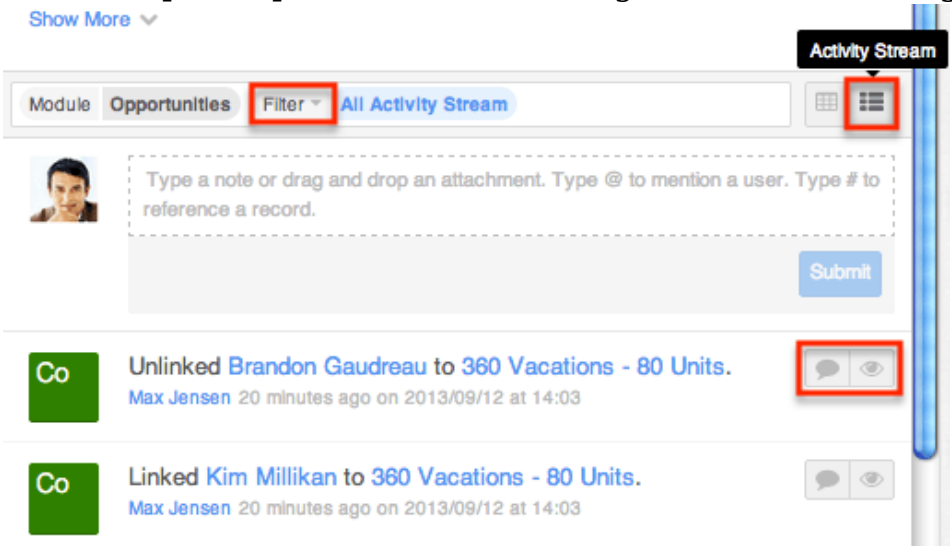
The Contacts subpanel for opportunities allows users to select a role (e.g. Primary Decision Maker, Business Evaluator, etc.) for each related contact to help you classify how each individual will ultimately factor into the buying decision. To select a role, simply choose "Edit" from the Actions menu on the far right of the record's row in the subpanel. The record's row will open up within the subpanel allowing you to edit the individual fields. Select the appropriate role for the contact then click "Save" and the chosen role will display in the Contacts subpanel of the opportunity record.




## Activity Stream

The Opportunity record view's activity stream displays user posts and record posts specific to the individual opportunity record. To view the record's activity stream, simply click the Activity Stream button below the opportunity's fields. Users can view all posts in the record view's activity stream even if they do not follow the record in Sugar. Please note that you must follow the record if you wish to view the record view posts via the Home page or List View activity stream. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts by clicking the Comment

button to the far right of each post, entering in your comment, then clicking "Reply". You can also preview the record referenced in the record post by clicking the Preview button. The activity stream can also be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box then selecting the desired message type.

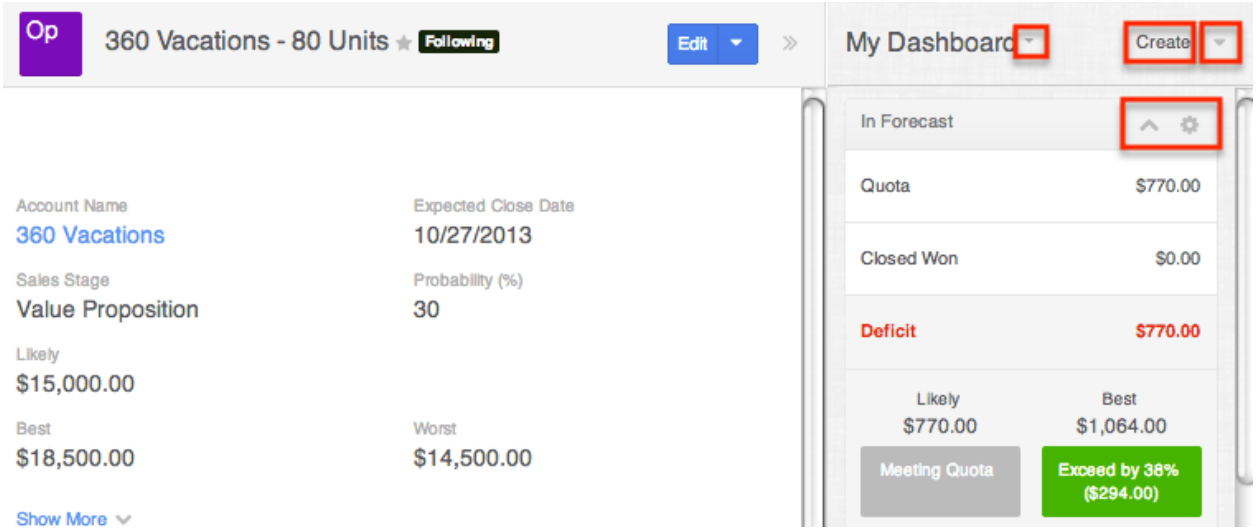



## Intelligence Pane

An intelligence pane displays to the right of the opportunity's record view and provides users with valuable information specific to the opportunity's sales, activities, etc. The Help Dashboard normally displays by default along with the Record View Help dashlet and Learning Resources dashlet. The Record View Help dashlet provides users with a brief introduction to the module along with some instructions to help users utilize and navigate around the record view. A link to the corresponding documentation (e.g. Opportunities documentation) in the Application guide is also provided within the Help dashlet. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard, which will display some stock dashlets (e.g. Planned Activities dashlet, History dashlet , etc.) by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may choose to view any of their dashboards using the triangle to the right of the current dashboard's name and may create other dashboards for use with the Opportunities module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets to their dashboards.

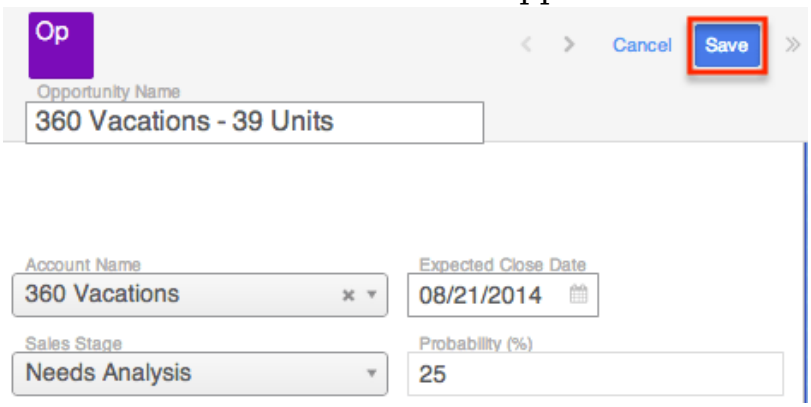
Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within

the current dashboard. You can collapse dashlets you do not wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Opportunities module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.




## Editing Opportunities

Opportunities may be edited at any time to update or add information to the record. You can make changes to existing opportunity records via the Opportunities record view. The record view is available within the Opportunities module and includes all of the Opportunities fields you should need.

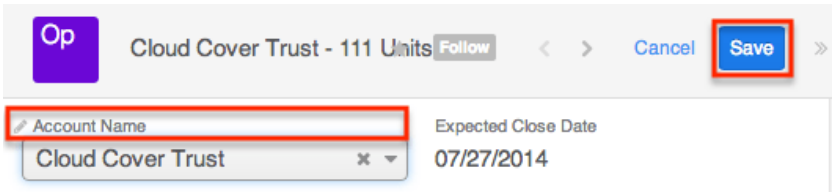



Please note that your ability to edit opportunities in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure the Opportunities record view via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

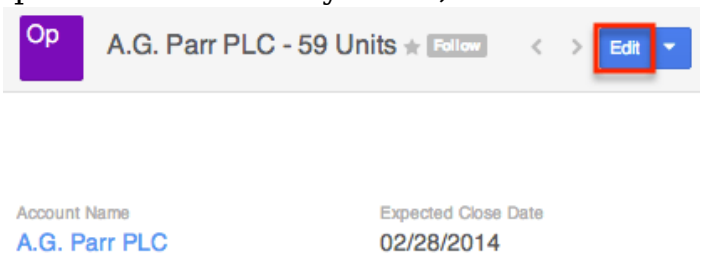
## Editing Inline Via Record View

Users can edit individual fields on the Opportunities record view without entering the full edit mode by clicking the field name. Fields which are available for inline editing will display a pencil icon when hovering on the field name or value. This will allow users to type or select a new value. Click "Save" to preserve the changes made to the field.



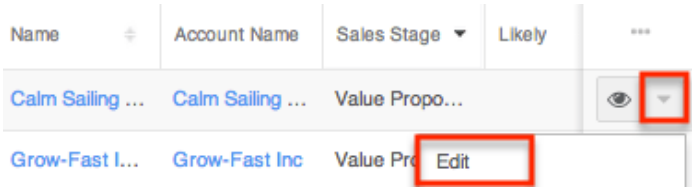

## Editing Via Record View

You can edit many opportunity fields at once via the record view by clicking the Edit button on the upper right of the page. Once the record view layout is open, update the necessary fields, then click "Save" to preserve the changes made.

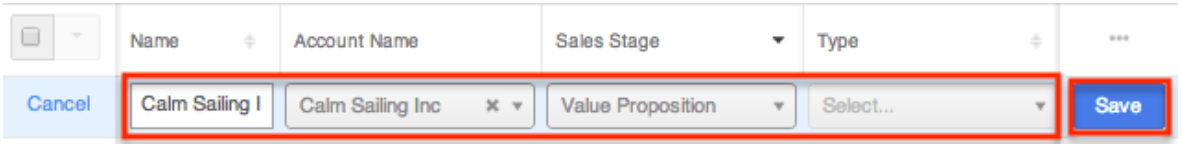



## Editing Inline Via List View

You can also edit individual fields on the Opportunities list view without entering the full edit mode. Click the Record Actions menu to the far right of the record's row and select "Edit".




The fields on the record's row will open up allowing users to type or select a new value. You can click the double arrow icon on the upper right of the page to expand the list view for editing. Click "Save" to preserve the changes made to the opportunity record.




Note: Text area fields are not inline editable from list views.

## Deleting Opportunities

If an opportunity record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Opportunities record view or list view. Deleting via the record view allows you to delete a single record while the list view allows for mass deleting multiple records at once as well as single record deletions. Deleting opportunity records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

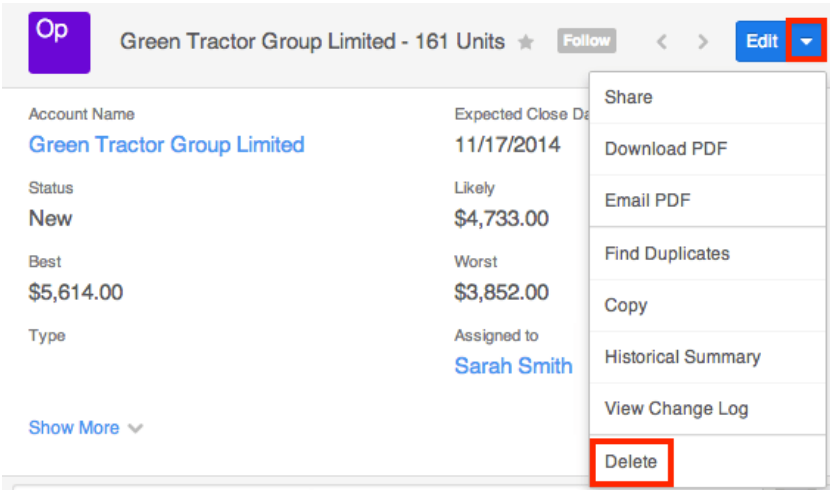
Note: For data integrity purposes, an opportunity related to a revenue line item with a "Closed Won" or "Closed Lost" status may not be deleted. In addition, revenue line items in these statuses may not be deleted.

Your ability to delete opportunities may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

### Deleting Via Record View

Use the following steps to delete an opportunity record via the record view:

1. Navigate to an opportunity's record view.
2. Select "Delete" from the Actions menu.

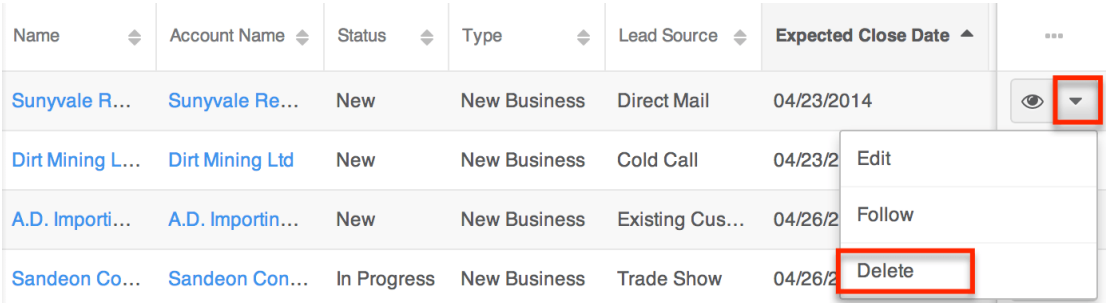



3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

## Deleting Via List View

Use the following steps to delete an opportunity record via the list view:

1. Navigate to the Opportunities list view by clicking the Opportunities module tab.
2. Use the Module Search to find the Opportunity record you wish to delete.
3. Click the Record Actions Menu to the far right of the record's row and select "Delete".



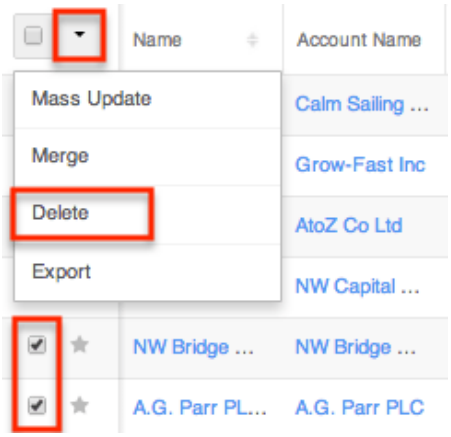

4. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

## Mass Deleting Via List View

Use the following steps to delete one or more opportunity records via the list view:

1. Navigate to the Opportunities list view by clicking the Opportunities module tab.
2. Use the Module Search to find the opportunity records you wish to delete.
3. Select the desired opportunity records then choose "Delete" from the Actions

menu.



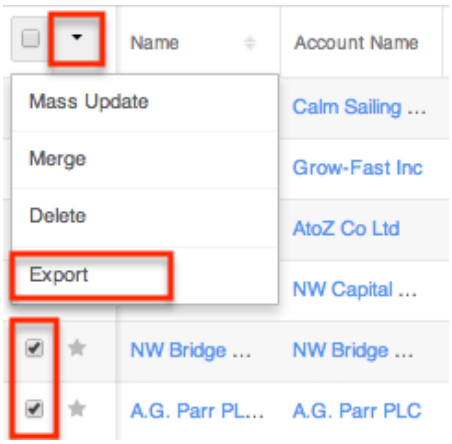

4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

You can also use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to delete more than 1000 records or delete a specific group of records on the list view, please use the in module search to perform the deletions in smaller batches.

## Exporting Opportunities

Sugar's Export option allows users to download all fields for the selected opportunities to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Opportunity data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered opportunities back into Sugar. For more information on updating existing records via import, please refer to the Import documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of opportunity records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Opportunities may be exported from the Opportunities list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for opportunities and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.




Please note that your ability to export opportunities from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

## Mass Updating Opportunities

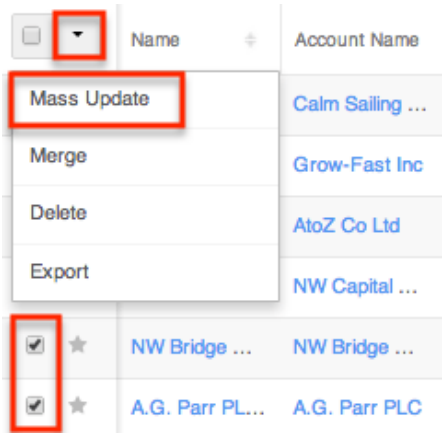
Mass Updating allows users to make the same change to multiple opportunity records at once from the Opportunities list view. Users with administrator or developer access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide. You can use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to update more than 1000 records or update a specific group of records on the list view, please use the filter option in module search to perform the updates in smaller batches.

Please note that your ability to mass update opportunities may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

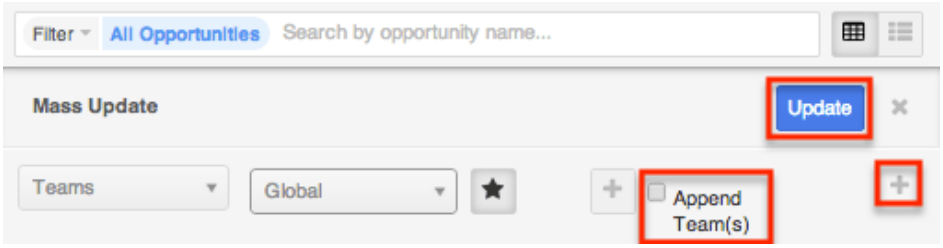
Use the following steps to mass update opportunity records from the list view:

1. Navigate to the Opportunities list view by clicking the Opportunities module tab.
2. Use the list view's Module Search to identify opportunities you wish to modify.
3. Select the desired opportunities then choose "Mass Update" from the Actions

menu.




4. The Mass Update panel will appear below the search bar. Set values for the field(s) you wish to alter.
    - To add additional fields for mass update, click the Plus icon to the right of the dropdown list.Note: For the Teams field, mark "Append Team(s)" to add the teams specified here to any existing team assignments. Not marking the checkbox will replace the existing team assignment with the new one.




5. Click "Update" to save the changes to all of the currently selected opportunity records.

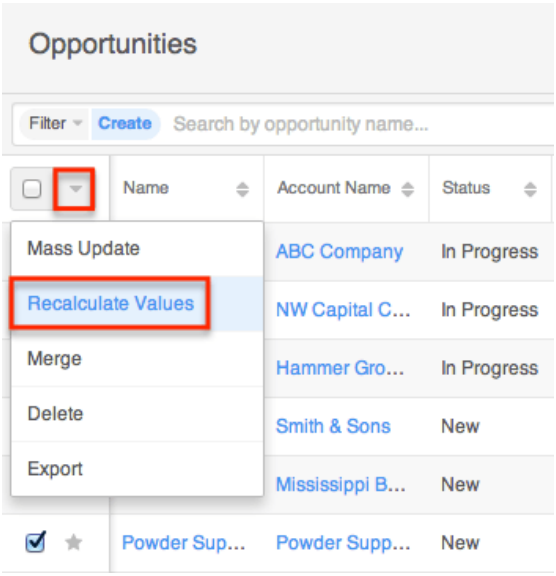
## Recalculating Calculated Values

This feature allows calculated values to be recalculated following the addition or alteration of a calculated field in Studio. For more information on calculated fields, please refer to the Studio documentation in the Administration guide. Sugar allows you to select up to 1000 records at a time for recalculating values. If you desire to recalculate values for more than 1000 records, you will need to perform the recalculation in several batches.

Note: This action will not appear unless the user is an Admin or has developer-level access to the module and if there is at least one calculated value in that module. Please note that your ability to recalculate values may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Recalculate Values option.

The following steps cover recalculating values for records from the Opportunities list view as an example:

1. Navigate to the Opportunities list view by clicking the Opportunities module tab.
2. Use the list view's Module Search to identify opportunities you wish to update.
3. Select the desired opportunities then choose "Recalculate Values" from the Actions menu.




## Finding Duplicate Opportunities

Between multiple users working in Sugar, importing new records, and converting leads, it is possible for duplicate opportunity records to be accidentally input to the system. Before creating a new opportunity record, a good practice is to first check that the opportunity does not already exist in Sugar. You can locate duplicate records for cleanup using module search from the Opportunities list view. Searching for opportunities with similar names or other information can turn search into a powerful, duplicates-finding tool. Sugar also provides a wizard for finding potential duplicates that is available from the Opportunities record view and may be used as shown below. If duplicate opportunity records are detected, you can perform a merge per the Merging Opportunities section of this documentation.

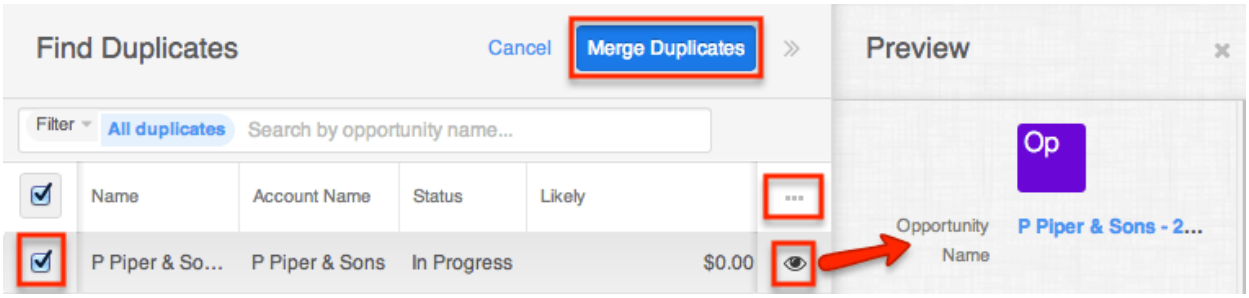
Please note that your ability to use the Find Duplicates action may be restricted by any role which prevents opportunity deletion. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Find Duplicates option.

Use the following steps to locate duplicate opportunities using the Find Duplicates option from the Opportunities record view:

1. Navigate to an opportunity 's record view.
2. Choose "Find Duplicates" from the Actions menu.




3. Potential duplicate opportunity records will be listed on the Find Duplicates page. Select the duplicate record(s) you wish to merge then click "Merge Duplicates".
    - You can preview the duplicate record's details by clicking the Preview button to the far right of the records row.
    - You can search for specific records from the Opportunities list view if you wish to check for more possible duplicates. For more information on performing a search, please refer to the Module Search section of this documentation.
    - You can also click the Column Selection icon above the Preview button to change the list of fields that display on the list view column headers.




Once you click "Merge Duplicates", the merging process with the current record will begin. For instructions on performing the merge that follows, please refer to Steps 3-9 of the Merging Via List View section of this documentation.

## Merging Opportunities

When duplicate records are identified in Sugar, you have the option to merge two or more opportunities into a single record. Once the merge is complete, the duplicate opportunity record(s) will be deleted, and the primary record will remain. Please note that all relationships belonging to the duplicate opportunities

will be merged to the primary record meaning that any calls, meetings, contacts, etc. related to the duplicate opportunity record(s) will automatically be related to the resulting, merged opportunity record.

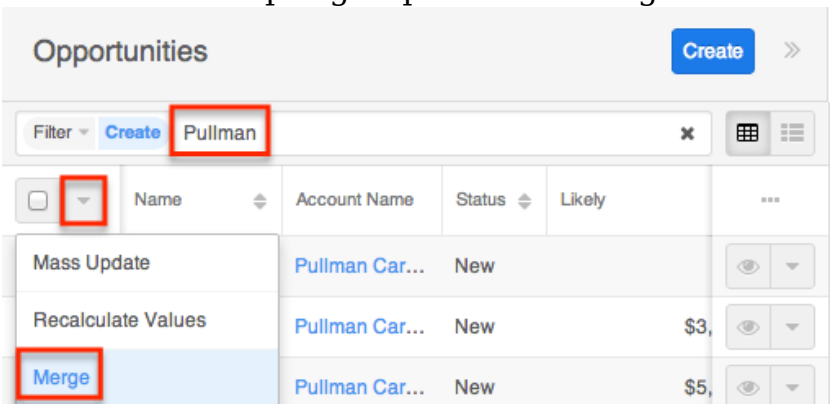
Note: Date Created, Date Modified, and Password field types are not supported when merging duplicate records in Sugar.

## Merging Via List View

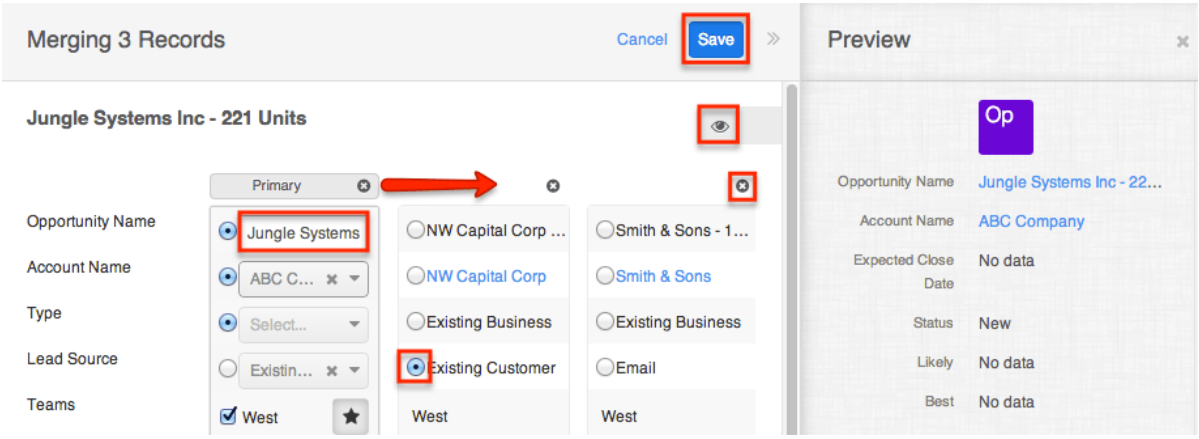
Module Search may be used to identify duplicate opportunities by, for example, searching for opportunities with similar names. Once your search has identified duplicate opportunities, you can merge them directly from the Opportunities list view.

Use the following steps to merge opportunities via the list view:

1. Use the list view's Module Search to identify duplicate opportunities.
2. Possible duplicates will be displayed in the list view. Select the duplicate record(s) that you wish to merge.
    - Please note that up to five records may be merged at once in Sugar. An error message ("Invalid number of records passed. The valid range is from 2 to 5 records.") will appear if more than five records are selected when attempting to perform a merge.




3. Select "Merge" from the Actions menu to display the Merging Records page. The primary record's field values are displayed on the left while other record's values are in columns to the right. For convenience, fields with differing values will appear on the top of the list. Saving the merge will preserve only the field values marked with the radio button into a single record.




If three or more records are selected to be merged, an X icon will appear at the top right of each record. Clicking the "X" will remove the record from the merge process but will not delete the record.

4. To change which record is considered the primary, drag and drop the Primary label on the top of a different column.
5. Review the field values in each column and click the radio button to the left of the value that should appear on the final record. You can also manually type or select a new value for any field as necessary.
    - Note: Fields you do not have Edit access for cannot be edited on the merging records page.
6. Preview what the final, merged record will contain as you work by clicking the eye icon to display the preview in the Intelligence Pane.
7. Click "Save" once all fields you wish to appear on the single, merged record have their radio buttons selected.
8. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Confirm" to proceed.

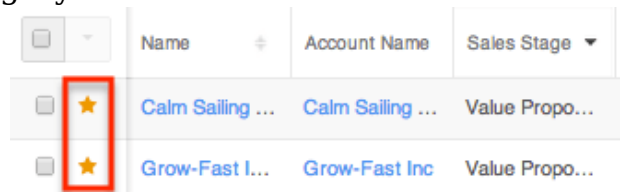
## Favoriting Opportunities

Each Sugar user has the option to designate their own favorite opportunities which are important or will be viewed often so that they can easily be accessed via search or from the Opportunities module tab . Once records are marked as favorites, select "My Favorites" from the Filter option next to the Search bar to retrieve your favorites or select from your recent favorites directly from the Opportunities Module Tab.

### Favoriting Via List View

Use the following steps to mark records as favorites via the Opportunities list view:

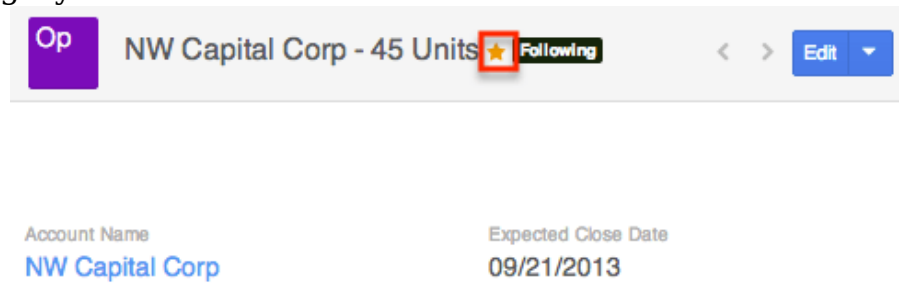
1. Navigate to the Opportunities list view by clicking the Opportunities module tab.
2. Use the Module Search to find the opportunity records you wish to mark as favorites.
3. Mark the star icon on the left of each desired opportunity's row.
4. To remove the opportunity as a favorite, click the star again to revert it to gray.




## Favoriting Via Record View

Use the following steps to mark records as favorites via the Opportunities record view:

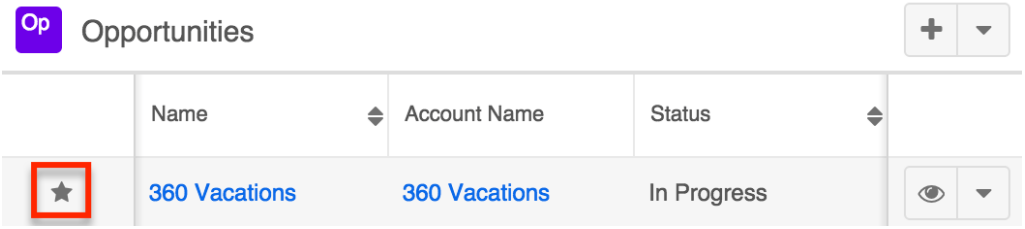
1. Navigate to an opportunity's record view.
2. Click the star icon to the right of the opportunity's name in the upper left of the record view to designate it as a favorite.
3. To remove the opportunity as a favorite, click the star again to revert it to gray.




## Favoriting Via Subpanel

Use the following steps to mark opportunity records as favorites via the subpanel in related modules:

1. Navigate to a related module's record view (e.g. Accounts).
2. Click the star icon to the left of the desired record's row in the Opportunities subpanel.




3. To remove the opportunity as a favorite, click the star again to revert it to white.

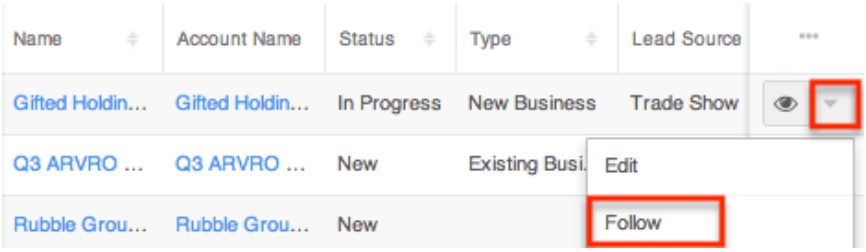
## Following Opportunities

Users can also choose to follow specific opportunity records to which they have access to in Sugar by clicking the Follow button (If grayed out) to the right of the opportunity's name. This allows each user to personalize their activity stream by specifying which records' posts should appear on the activity streams displayed on their Home page and Opportunities list view. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. Should a user lose access to a record in Sugar, they will automatically stop following that record.

### Following Via List View

Use the following steps to mark a record to follow via the Opportunities list view:

1. Navigate to the Opportunities list view by clicking the Opportunities module tab.
2. Use the Module Search to find the Opportunity records you wish to follow.
3. Click the Record Actions menu to the far right of the records row and select "Follow".
4. To stop following the opportunity, click the Record Actions menu then select "Unfollow".

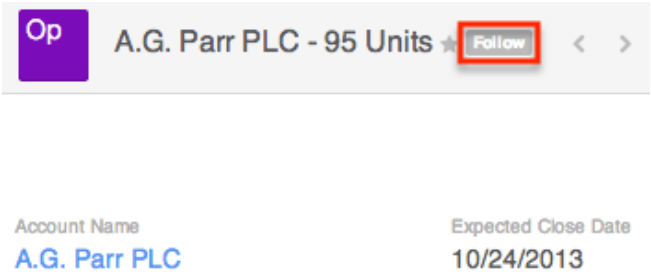



### Following Via Record View

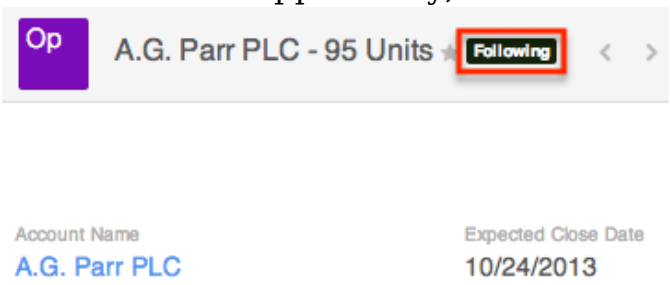
Use the following steps to mark a record to follow via the Opportunities record

view:

1. Navigate to an opportunity's record view.
2. Click the Follow button to the right of the opportunities name.

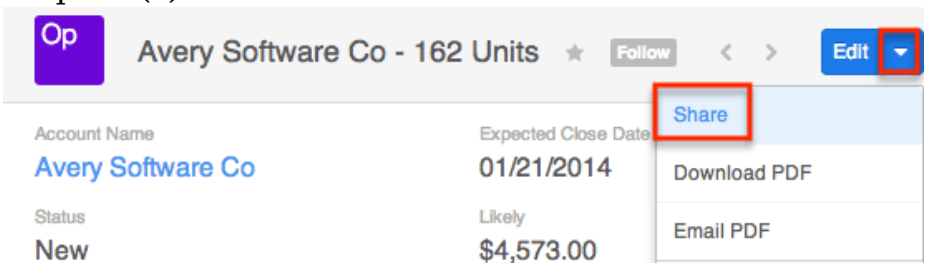



3. To unfollow the opportunity, click the Follow button again to revert it to gray.




## Sharing Opportunities

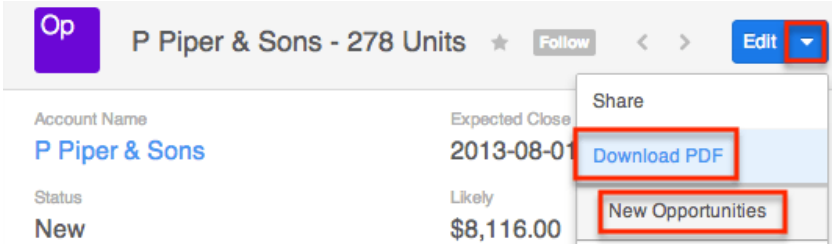
Individual Opportunity records can be shared with other users in your organization by sending an email with the record's link directly from the record view. In the opportunity's record view, select "Share" from the Actions menu which will open a Compose Email window including the URL of the opportunity record. Enter the recipient(s) email address in the To field then click "Send".




Users can simply click the link in the email to access the opportunity record in Sugar. Please note that the user must be logged into Sugar in order to access the record. Users will only be able to view the shared record as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

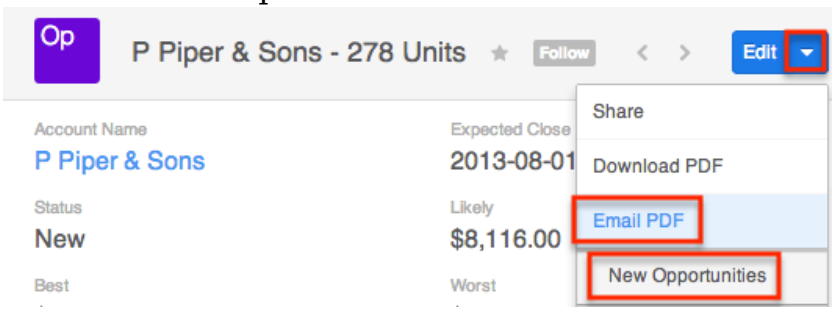
## Downloading Opportunity Information as a PDF

Users have the option to download opportunity information as a PDF file via the Opportunities record view by clicking the Actions menu and selecting "Download PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Download PDF option in the Actions menu. Simply select one of the templates to generate the PDF file to view or save onto your local machine. Please note that the Download PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.

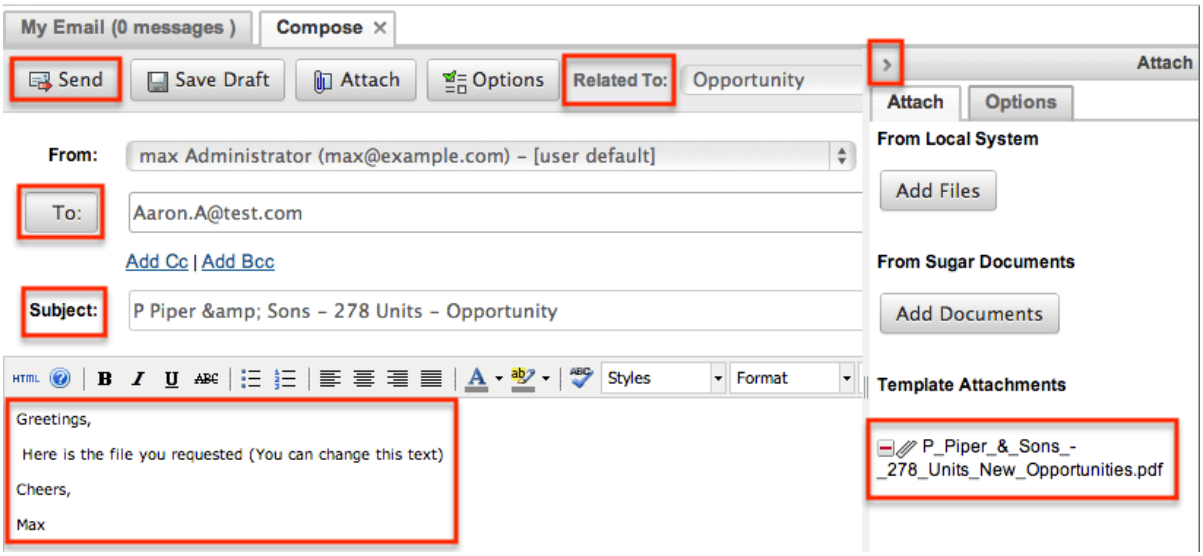



## Emailing Opportunity Information as a PDF

Users also have the option to email opportunity information as a PDF file using any of the available Opportunities module templates using Sugar's email client. Simply click the Actions menu and select "Email PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Email PDF option in the Actions menu.



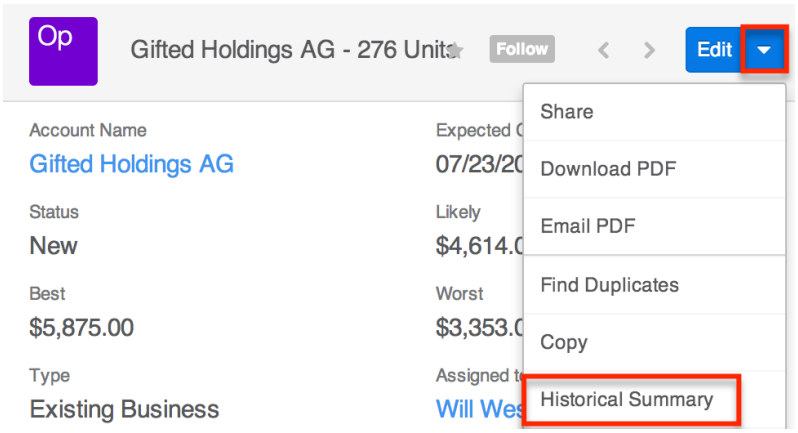

Select one of the templates to open a Compose window in the Emails module. The email's To field will automatically populate with the email address of the opportunity record, and the Subject field will display the opportunity's name. The email is automatically related to the opportunity record, and the chosen opportunity PDF will be attached. You can update the fields as necessary and enter a body for the email message then click "Send". For more information on sending emails via the Emails module, please refer to the Emails documentation.




Please note that the Email PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.

## Viewing Activities' Historical Summary

Users can easily view quick details for the various related activities (e.g. calls, meetings, notes, emails, etc.) that have taken place via the Historical Summary option. Simply navigate to the opportunity's record view and select "Historical Summary" from the Actions menu to view the historical activities related to the opportunity in one place.

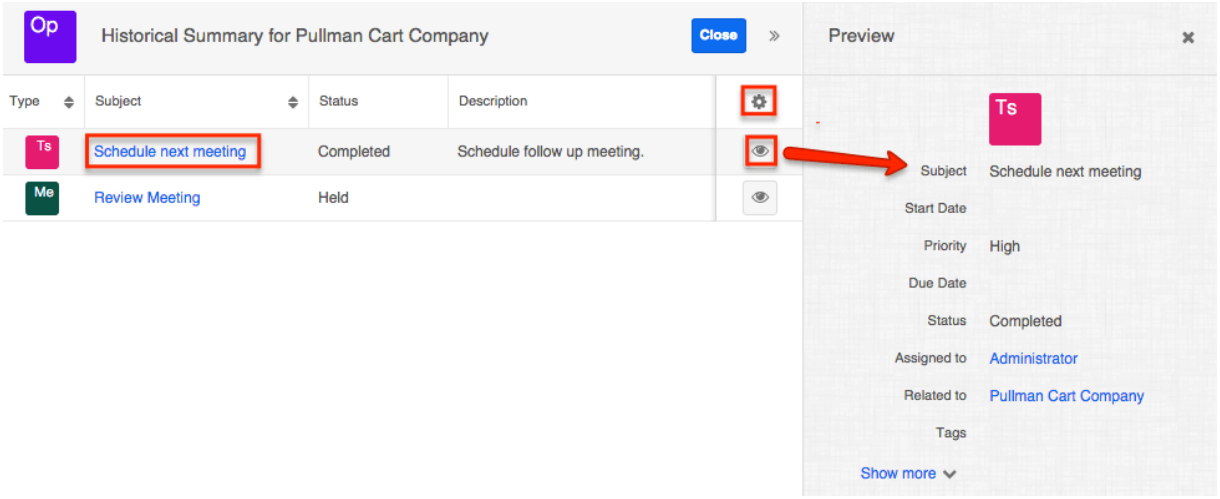



The Historical Summary page will display each activity's subject, type, status, description, date modified, etc. and you can simply click the activity's name to view the full details for each activity. Please note that you can add Date Created and User fields by clicking the Column Selection icon to the far right of the list view

column headers. You can also preview the activity record via the intelligence pane by clicking the Preview icon to the far right of each record's row. It will provide users with key information regarding the record as well as the related activity stream information (if any). For more information on activity streams, please refer to the Activity Streams documentation. Please note that preview is only available for modules (e.g. Task, Note) using the Sidecar user interface.

The historical summary list view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the system's default column order.

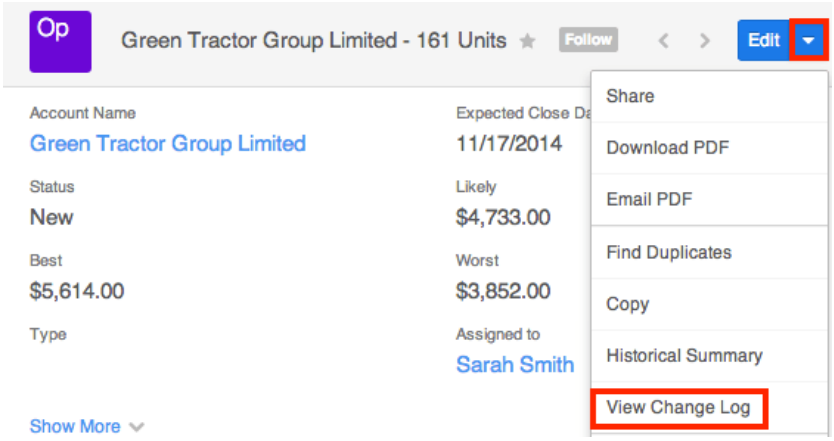
Users can also easily adjust the size of columns in the historical summary list view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the Historical Summary list view is different from the default column width.



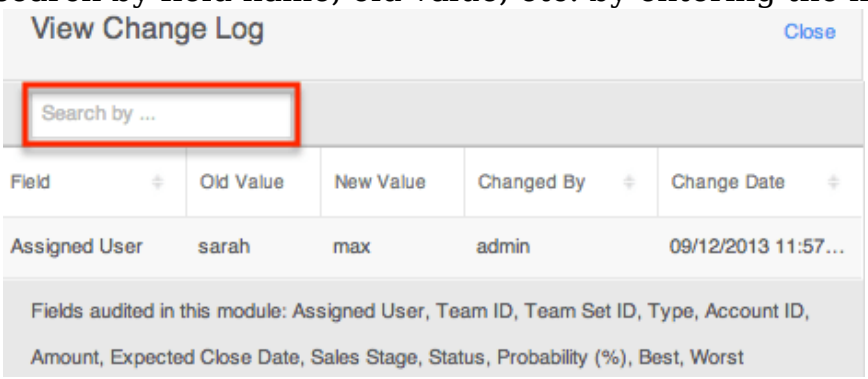

## Viewing Opportunity Change Logs

Changes made to each opportunity record are tracked over time, and users are able to view the history of changes via the change log in each opportunity's record view. To view the change log, navigate to an opportunity in record view and select

"View Change Log" from the Actions menu. Please note that only fields marked as "Audit" in Admin > Studio will be displayed in the change log. For more information on designating fields for audit, please refer to the Studio documentation in the Administration guide.




Once the change log opens, you can view the details of historical changes and can search by field name, old value, etc. by entering the keyword into the search box.




## Updating Currency Rates

When saving an opportunity in a currency that differs from the system-defined default currency, Sugar will store the conversion rate for that currency at the record level. This conversion rate is used to calculate the converted Likely, Best, and Worst amounts when the field is set to use the system default currency (as opposed to the user's preferred currency which is explained below). To keep amounts historically accurate, the conversion rate will only update on an opportunity provided the sales stage is not set to "Closed Won" or "Closed Lost". If the opportunity is in any other sales stage, the conversion rate will update under the following scenarios:

- The opportunity undergoes a save event (e.g. mass update, manual save, etc.) and the record's currency has a different conversion rate defined in Admin >

Currencies than is currently saved in the opportunity.
- An administrator updates the currency exchange rate under Admin > Currencies. This will trigger a scheduled job which updates all opportunities saved with that currency to the new rate.

When the viewing user's profile has the Show Preferred Currency option selected, the converted Likely, Best, and Worst amounts display in the user's preferred currency. In this case, the conversion rate used to calculate the converted amounts is drawn directly from the conversion rate at the system level rather than any conversion rate stored on the record. This means that the value will always use the current conversion rate regardless of the opportunity's sales stage. For this reason, the converted amount fields should not be considered historically accurate for closed opportunities when it is using the user's preferred currency. For information about setting a user's Preferred Currency and Show Preferred Currency options, please refer to the User Profile documentation.

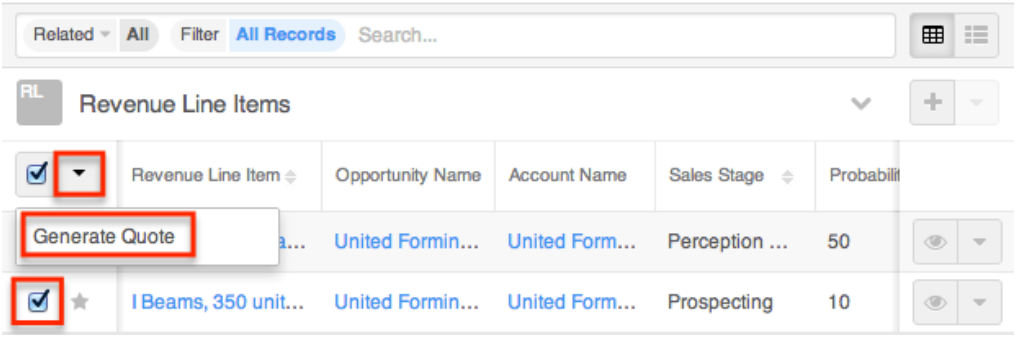
For more information about currency exchange rates, please refer to the Currencies documentation in the Administration guide.

## Generating a Quote

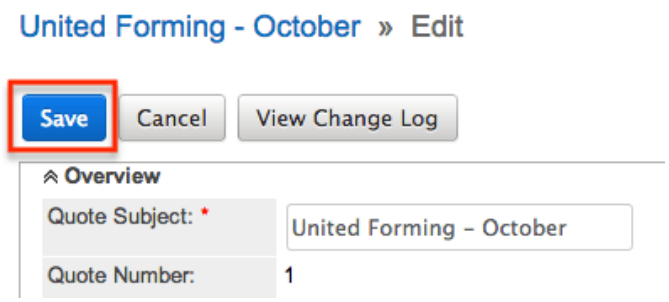
A quote may be generated from one or more of an opportunity's revenue line items via the Opportunities record view's Revenue Line Items subpanel. Each individual revenue line item may be used to generate a quote only once.

Use the following steps to generate a quote from an opportunity's Revenue Line Items subpanel:

- Navigate to the Revenue Line Item subpanel on an opportunity's record view.
- Select the revenue line items you wish to include on a quote.
- Choose "Generate Quote" from the subpanel's Actions menu.




- The new quote is opened in record view to allow additional changes. Make any necessary changes to the quote's fields then click Save to finalize the new quote record.




The quote record is automatically generated with a quoted line item record for each revenue line item record. For more information, please refer to the Quotes and Quoted Line Items documentation.

Last Modified: 10/11/2016 06:35pm

# Forecasts

## Overview

Sugar's Forecasts module incorporates revenue line item records to build forecasting worksheets and predict sales. Users can work towards sales quotas at the individual, team, and sales organization level.

Before users can access the Forecasts module to begin building forecasting worksheets, a user with administrator access must configure the Forecasts module with the organization's desired Time Periods, Ranges, and Scenarios. For more information on setting up the Forecasts module, please refer to the Forecast Configuration documentation in the Administration Guide.

Sales representatives use the Forecasts module to work with their assigned revenue line items as the current time period progresses. These users will commit total predictions for their personal sales based on the revenue line items they expect to close. For instructions specific to a sales representative's use of the module, please refer to the Sales Representative section of this documentation.

Sales managers work with their own revenue line item records similarly to other sales representatives. In addition, they aggregate their reportee's committed forecast amounts to predict their total team's sales and work towards the team's quota for each time period. For instructions specific to a sales manager's use of the module, please refer to the Sales Managers section of this documentation.

Additional insights are offered by the elements of the expandable Intelligence Pane including analysis for an individual's worksheet and analysis for a manager's team

worksheets. For more information, please refer to the sales representative Intelligence Pane and the sales manager Intelligence Pane sections of this documentation.

Note: If your instance is configured to use opportunities alone without revenue line items, please refer to the Forecasts documentation in the Professional Edition Application Guide. For more information about changing your opportunities model via Admin > Opportunities, please see the Opportunities Configuration documentation in the Administration Guide.

## Forecast Fields

The Forecasts module contains the following fields which enable users to work with revenue line item records to forecast sales for a given time period. Users with administrator or developer access have the ability to enable fields for use in the Forecasting module via Admin > Forecasts. Many revenue line item fields are available to be added to the forecasting worksheet. For more information please refer to the Forecast Configuration documentation in the Administration Guide.

| Field | Description |
|---|---|
| Account Name | The account to which the revenue line item belongs; cannot be in-line edited from the Forecasts module |
| Best | The revenue line item's Best field representing the most optimistic total amount; automatically set to match Likely when Sales Stage is "Closed - Lost" or "Closed - Won" |
| Best (Adjusted) | For managers, the Best value with an optional, manual adjustment above or below your reportee's committed Best total and your own worksheet's Best total; reported to your manager as the Best value when committing your forecast |
| Expected Close Date | The revenue line item's expected date of completion |
| Forecast | The revenue line item's commit range (e.g. "Include", "Exclude", etc.) based on the revenue line item's initial probability and the user's edits; controls whether the revenue line item is counted in the |

| | |
|---|---|
| | forecast's totals and allows for filtering; automatically set to "Included" when Sales Stage is "Closed - Won" and "Excluded" when Sales Stage is "Closed - Lost" |
| Likely | The revenue line item's Likely field representing the most likely total amount |
| Likely (Adjusted) | For managers, the Likely value with an optional, manual adjustment above or below your reportee's committed Likely total and your own worksheet's Worst total; reported to your manager as the Likely value when committing your forecast |
| Opportunity Name | The revenue line item's related opportunity; cannot be in-line edited from the Forecasts module |
| Probability | The revenue line item's current probability of being won<br><br>Note: This value is calculated based on the selected Sales Stage and cannot be edited. |
| Quota | For sales representatives, your individual quota for this sales time period as assigned by your manager<br><br>For managers, your quota for this sales time period as assigned by your manager |
| Quota (Adjusted) | For mid-level managers, your team's quota with an optional, manual increase above your team's assigned quota; when assigning quota to your reportees, this is the quota value they will receive |
| Revenue Line Item Name | The revenue line item's name; cannot be in-line edited from the Forecasts module |
| Stage | The revenue line item's current sales stage |
| Tags | User-created keywords or phrases used to find, group, and classify data by |

| | |
|---|---|
| | common attributes |
| Worst | The revenue line item's Worst field representing the least optimistic total amount; automatically set to match Likely when Sales Stage is "Closed - Lost" or "Closed - Won" |
| Worst (Adjusted) | For managers, the Worst value with an optional, manual adjustment above or below your reportee's committed Worst total and your own worksheet's Worst total; reported to your manager as the Worst value when committing your forecast |

## Forecasts Module Tab

The Forecasts module tab is typically located under the More tab on the navigation bar at the top of any Sugar screen to the right of the home cube icon. Depending on your settings, you may have to click "Show More" in order to see the Forecasts module tab. Click the tab to access the Forecasts module. A user with administrator access must first configure the Forecasts module before it can be accessed and used. For more information on setting up the Forecasts module, please refer to the Forecast Configuration documentation in the Administration guide.

If you do not see the Forecasts module tab in Sugar, please check the following:

- The Forecasts module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Forecasts module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Forecasts module for your entire Sugar instance. Reach out to your Sugar administrator to have the Forecasts module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

## Forecast Actions

Forecast actions are available at the top of the Forecasts module page and allow users to perform the following operations:

| Menu Item | Description |
|---|---|
| Save Draft | Saves changes to the user's worksheet but does not make these changes available to the user's manager |
| Commit | Saves changes to the current worksheet and pushes these changes to the user's manager's team worksheet or, in the case of a manager committing a personal worksheet, to his or her own team worksheet |
| Assign Quota | For managers, pushes quota changes to reportees' forecasting worksheets. |
| Export CSV | Exports the rows of the current forecasts worksheet |
| Settings | For users with administrator access, opens the Forecast Configurations wizard |

## Sales Representatives

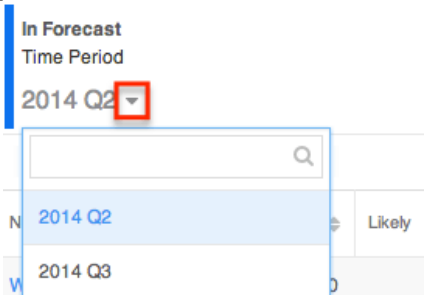
Sales representatives use the Forecasts module to work with their assigned revenue line items as the current time period progresses. These users will commit total predictions for their personal sales based on the revenue line items they expect to close.

When you access the Forecasts module as a sales representative, you will see your name at the top left of the screen. Sales representatives who do not have any reportees will only be able to see and work with his or her own revenue line items. Below your name, you will see a time period selection, summary and commit history, filter, and worksheet. On the right side of each page is an expandable Intelligence Pane which offers additional insight into your forecasting worksheet.

### Time Periods

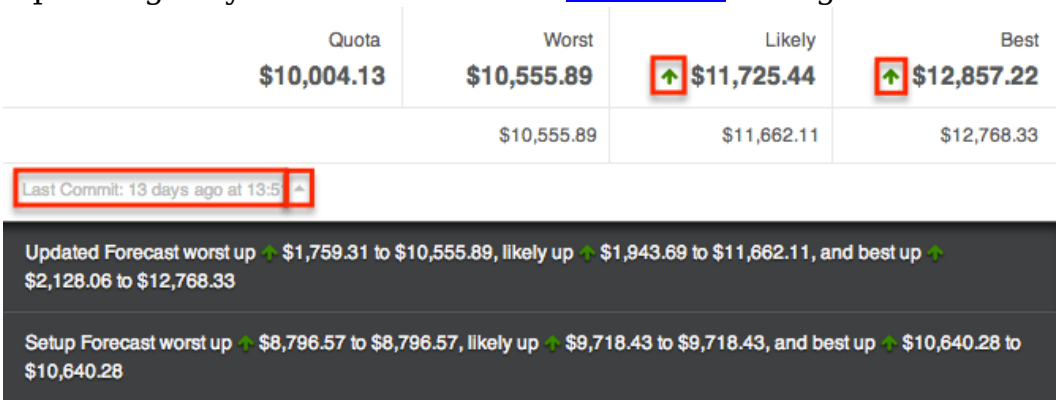
Below your name, you will see the current time period for which you are forecasting revenue line items to meet a quota. The length and start date of this time period depends on the Time Periods configuration set up by your administrator. Clicking the arrow to the right of the current time period allows you

to choose a future or past time period, the availability of which is also determined by the administrator's Time Periods configuration. Select a past or future time period to work with revenue line items and forecast for those periods.




## Summary and Commit History

To the right below the Time Period selection, you will see a summary of your current forecasting numbers for the time period currently in view. The large numbers are your current worksheet's Quota, Likely, Best, and Worst predictions. The smaller numbers show your most recent commit's Likely, Best, and Worst predictions. Any red or green arrows next to the large numbers show whether you worksheet's current (uncommitted) numbers are higher or lower than your most recent commit. Please note that you may or may not see a Best and Worst depending on your administrator's Scenarios configuration.



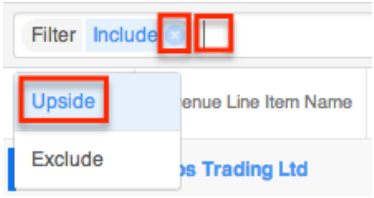

To the left of these summary numbers, you will see the date and time of your most recent commit. There will be no date and time shown if you have not yet committed for this time period. By clicking the arrow to the right of the latest commit date, a dark grey panel will appear showing a history of your commits for this time period along with the changes for each forecasting number from the previous commit.

## Filters

Below the summary and commit history, you will see a filter bar which controls what kinds of revenue line items are displayed. By default, the "Include" filter will

be active, meaning that only the revenue line items with a probability falling within the Include range specified during the administrator's Ranges configuration will be displayed. To add additional filters, click within the Filters bar and choose additional ranges. The filter(s) (e.g. Include, Exclude) added to the Filters bar will be preserved when you navigate away from the module. Returning to the Forecasts module will automatically display the revenue line items based on the filter(s) you last applied.

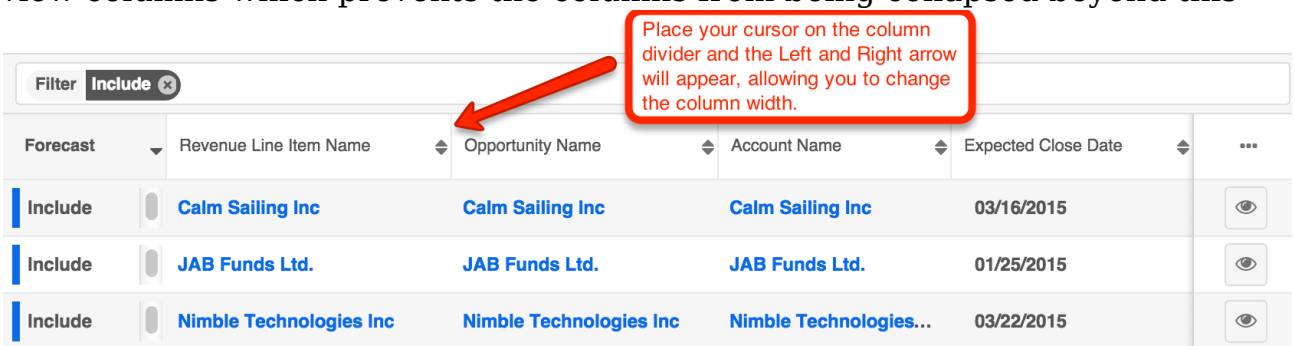
Please note the Upside and custom ranges may or may not be available depending on the administrator's Ranges configuration. To remove ranges from the filter, click the "x" for each filter name. Removing all filters will display all of your assigned revenue line items.




## Column Resizing

You can easily adjust the size of columns in the forecasting worksheet based on your viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies.

Note: Sugar enforces a minimum width for currency fields (e.g. Best, Likely, etc.) in list view columns which prevents the columns from being collapsed beyond this limit.




## Column Sorting

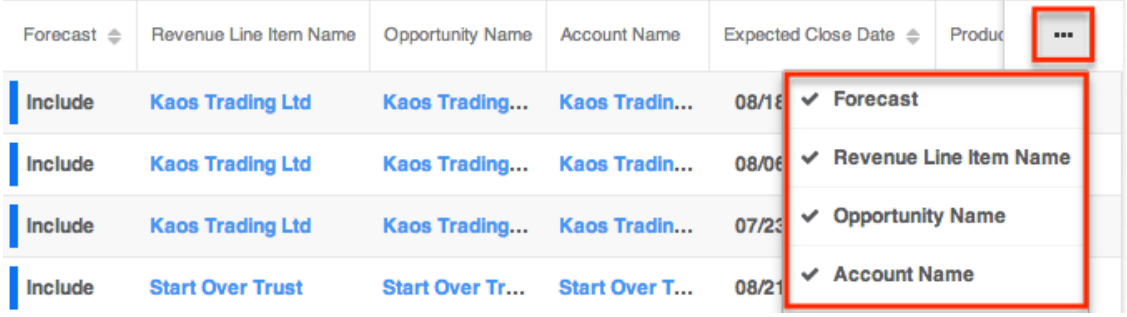
List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting

will have a pair of arrows. Please note that the list view may only be sorted by one column at a time.




## Column Selection

Sugar gives users the ability to personalize the list view by specifying which fields they want displayed in the list view. You can click the Column Selection icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column on your list view. Please note that administrators have the ability to configure what fields are available to display on the forecasting worksheet. For more information, please refer to the Forecast Configuration documentation in the Administration Guide.




## Line Items and Totals

Based on the chosen filters, you will see all or some of your assigned revenue line items for the currently selected time period listed below the Filters bar. On the far left of each row, a blue bar will appear to indicate whether or not the row's amounts are included in the totals for this time period. The presence of the blue bar indicates the row is being counted. In addition to the range called "Include", multiple forecast ranges may be counted towards your totals depending on how your administrator has configured forecast ranges for the instance. For more information about making more than one range included in totals, please refer to the Forecast Configuration documentation in the Administration Guide. The range and thus the inclusion of each row can be changed manually via this view. You can work directly with your revenue line item records by in-line editing their probabilities and amounts from the Forecasts module or by clicking the Name field to open a record in the Revenue Line Items module where you can make additional edits. To the right of each row is a preview button which will allow you to view

details about the revenue line item record in your intelligence pane.

| Forecast | Revenue Line Item Name | Expected Close Date | Stage | Probability | Worst | Likely | Best |
|---|---|---|---|---|---|---|---|
| Include | 5D Investments | 10/20/2014 | Negotia... | 80 | $4,100.00 | $4,500.00 | $5,100.00 |
| Include | Airline Maintenance ... | 10/24/2014 | Negotia... | 80 | $6,672.00 | $7,398.00 | $8,124.00 |
| Include | A.D. Importing Com... | 10/29/2014 | Negotia... | 80 | $40,100.33 | $47,216.33 | $48,316.33 |
| Displayed Total | | | | | $50,872.33 | $59,114.33 | $61,540.33 |
| Overall Total | | | | | $81,396.60 | $99,457.27 | $111,701.93 |

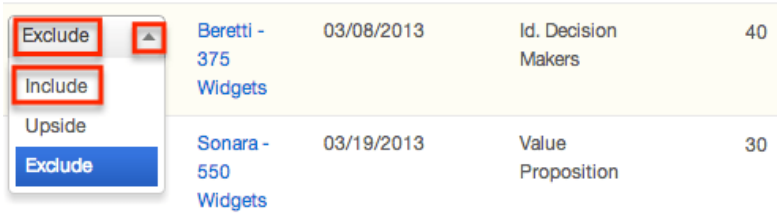
At the bottom of the list, the "Displayed Total" and "Overall Total" rows display sums of the Worst, Likely, and Best amount columns. The Displayed Total row shows the sum of the Worst, Likely, and Best amounts (both included and excluded) displayed on the worksheet based on the filters currently applied. The Overall Total row displays the totals (both included and excluded) of all revenue line items' amounts in this time period regardless of any filters currently applied.

## Editing Forecast Inclusion

The first time a revenue line item is loaded to a worksheet, Sugar will assign it a category of either "Include", "Exclude", "Upside" (optional), or a custom range based on the Ranges configured by your administrator. The revenue line items with a higher probability of being won are typically assigned to the Include range while those with a lower probability of being won are designated for the Exclude range. Your administrator may have chosen to use the Upside range or to create a number of other, custom ranges - each with their own non-overlapping range of probabilities. Custom ranges may also exist which have no association to probabilities.

Since one or more ranges may be considered as included depending on your administrators' configuration, the blue bars to the left of each row will update to reflect which items are included and which are excluded based on your updates to each's forecast range.

You may wish to alter the category automatically assigned to your revenue line items by these adminstrator-configured ranges especially as each revenue line item moves forward in the sales process and becomes more likely to be won. To do this, simply click on the revenue line item's current category in the Forecast column and choose the desired category from the dropdown menu.

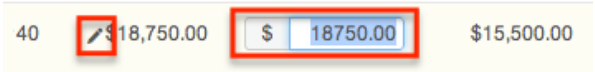



Changing a revenue line item's Forecast column to an included range such as "Include" will cause its Likely, Best, and Worst fields to be added to your totals while choosing an excluded range such as "Exclude" will remove the revenue line item's numbers from your totals. Changing which revenue line items are included on your worksheet requires you to save a draft or commit in order to preserved.

Note: All revenue line items in a Closed Won stage will be included in the worksheet and cannot have their Forecast column altered. All revenue line items in a Closed Lost stage will be excluded from the worksheet and cannot have their Forecast column altered.

## Editing Revenue Line Item Fields

In addition to editing the inclusion, you can make in-line changes to each revenue line item's fields including Sales Stage, Likely, Best, and Worst. To do so, simply click any field which shows a pencil icon when being hovered over, and enter the new amount. Keep in mind that your worksheet may or may not include "Best" and "Worst" depending on your administrator's Scenarios configuration.




Clicking outside the text box or pressing Enter/Return will save your change to the line and update the worksheet's totals, summary, and Intelligence Pane. Clicking the Save Draft or Commit button will also update the revenue line item records themselves and make your changes visible when viewing the revenue line item in other places in Sugar. Saving a draft or committing is also required to preserve these changes to your worksheet and, in the case of committing, make the changes visible in your manager's Forecasting module.

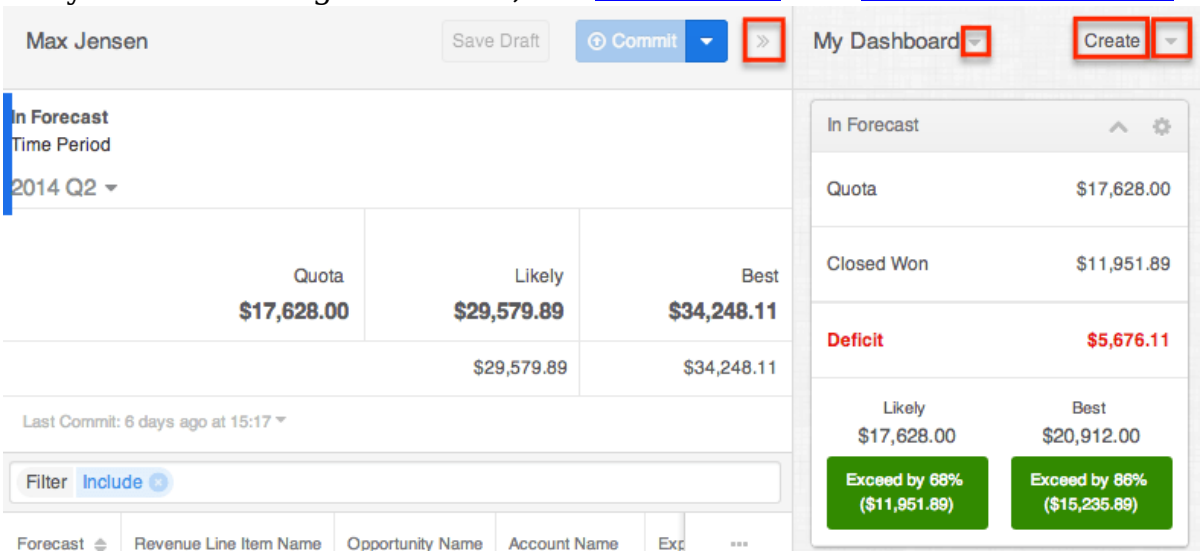
## Currency Support

If you use a currency different from your Sugar instance's default currency, your Likely, Best, and Worst amounts will be displayed in the system's default currency in the Forecasting module. Clicking to edit these amount values will, however, display and allow for editing in your chosen currency.

## Intelligence Pane

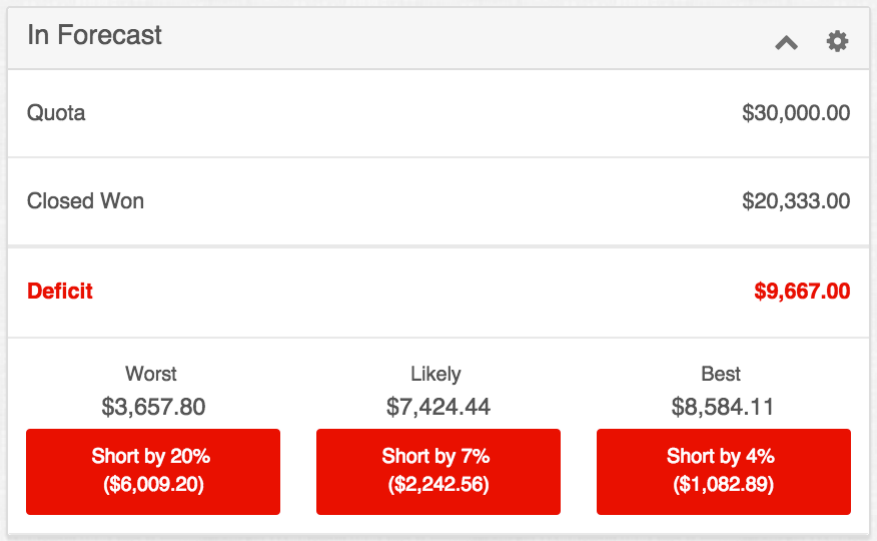
To the right of the forecasting worksheet you will find an expandable Intelligence Pane which provides additional insights for planning and forecasting. If the pane is hidden, click the double-arrow button to expand it. Clicking the button again will hide it when you wish to see your worksheet at full width. The Help dashboard normally displays by default along with the Help dashlet. The Help dashlet provides users with a brief introduction to the module along with a link (e.g. Forecasts documentation) to the corresponding documentation in the Application guide. In addition, you can access the Sugar University, Documentation and Support, and Community Forums websites. These links provide access to additional resources available to users. Simply click the appropriate link from the Help dashlet and the pages will open in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may create other dashboards for use with the Forecasts module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets (e.g. Saved Reports Chart Dashlet, etc.) to their dashboards.

The My Dashboard has two default dashlets which help provide additional insight into your forecasting worksheet, the In Forecast and Forecast Bar Chart dashlets.




### In Forecast Dashlet

The In Forecast dashlet appears at the top of the Intelligence Pane and gives a breakdown of how your revenue line items match up to your quota. Keep in mind that your In Forecast dashlet may or may not include "Best" and "Worst" depending on your administrator's Scenarios configuration.




The In Forecast dashlet's values are calculated based on the most recent updates to your worksheet even if the changes have not yet been saved as a draft or committed. The values take all of your revenue line items into account regardless of any filters currently being used in your worksheet. Their meanings are as follows:

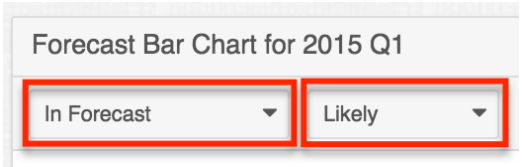
| Field | Description |
|---|---|
| Quota | Your personal quota for this sales time period as assigned by your manager |
| Closed Won | The total amount of your Closed Won revenue line items |
| Deficit | The difference between your quota and the total amount of your Closed Won revenue line items; the additional revenue needed to be won in order to meet your quota |
| Likely | The total of the Likely amounts for the included revenue line items which are not yet Closed Won |
| (Likely Colored Box) | When summing your Closed Won amounts and your Likely amounts for included revenue line items, in red, the remaining quota shortage and percentage of quota still outstanding or, in green, the quota overage and percentage exceeded above quota |
| Best | (Optional) The total of the Best amounts for the included revenue line items |

| | |
|---|---|
| | which are not yet Closed Won |
| (Best Colored Box) | (Optional) When summing your Closed Won amounts and your Best amounts for included revenue line items, in red, the remaining quota shortage and percentage of quota still outstanding or, in green, the quota overage and percentage exceeded above quota |
| Worst | (Optional) The total of the Worst amounts for the included revenue line items which are not yet Closed Won |
| (Worst Colored Box) | (Optional) When summing your Closed Won amounts and your Worst amounts for included revenue line items, in red, the remaining quota shortage and percentage of quota still outstanding or, in green, the quota overage and percentage exceeded above quota |

Forecast Bar Chart Dashlet

The Forecast Bar Chart appears on the bottom of the Intelligence Pane and provides a configurable chart showing different cuts of your forecasting data over the course of the selected time period. Each revenue line item's Expected Close Date field determines in which sub-period it appears. Only the revenue line items currently appearing on your worksheet will appear in your chart meaning that the chart respects your current filters. The Forecast Bar Chart dashlet's values are calculated based on the most recent updates to your worksheet even if the changes have not yet been saved as a draft or committed. Throughout all chart configurations, the dotted black line represents your quota for the given time period and can be hovered over to view the quota amount.

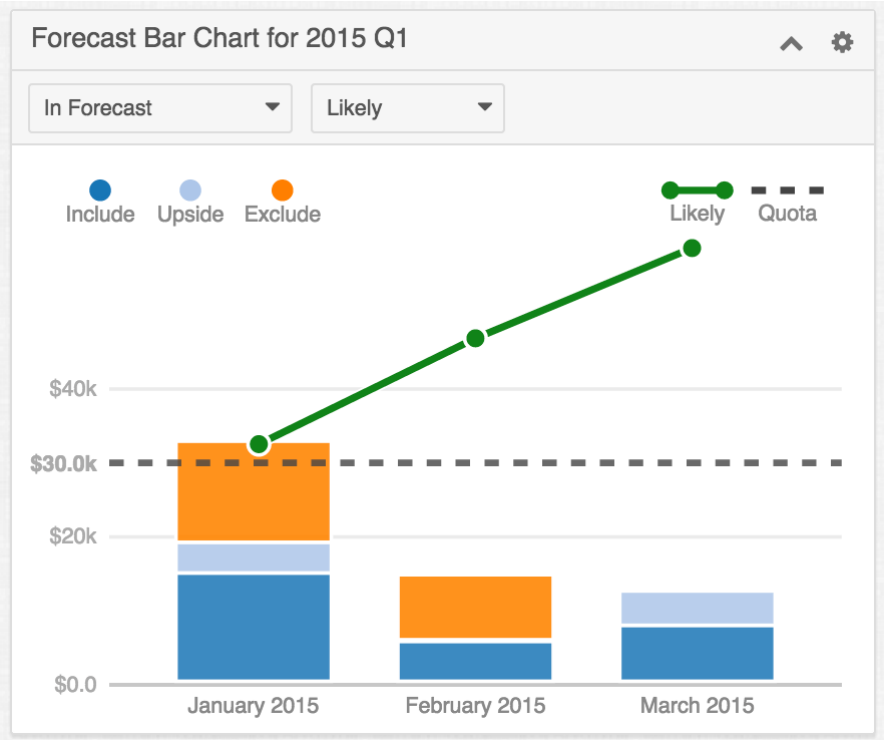
Use the two dropdown menus to control what is displayed in the chart.




When "Likely" is chosen, each green point represents the total Likely amounts for all revenue line items currently appearing in your filtered worksheet for that sub-period and any previous sub-periods falling within the selected time period. Choosing "Best" or "Worst" shows the same points using the revenue line items' Best or Worst amounts instead. A green line connects these points showing the

change in your possible cumulative amounts.

Each sub-period also displays bars which represent the Likely, Best, or Worst amounts (depending on the chosen dropdown option) for the revenue line items currently appearing in your filtered worksheet. Choosing "In Forecast" will color code segments of these bars according to each revenue line item's Forecast field (i.e. "Include", "Exclude", etc). Choosing "Sales Stage" will color code the bars according to the Stage field of each revenue line item. Choosing "Probability" will color code the bars according to the Probability field of each revenue line item.




Note: You may or may not see "Best" and "Worst" as options in the second dropdown depending on your administrator's Scenarios configuration.

## Sales Managers

Sales managers work with their own revenue line item records similarly to other sales representatives. In addition, they aggregate their reportee's committed forecast amounts to predict their total team's sales and work towards the team's quota for the each time period.

When you access the Forecasts module as a sales manager, you will see your name at the top left of the page along with an arrow which allows you to drill down into your personal worksheet, your team worksheet, and your reportee's worksheets hierarchically. While working with your personal worksheet works similarly to how a regular sales representatives works with their revenue line item, you will also have options such as time period selection, summary and commit history, and

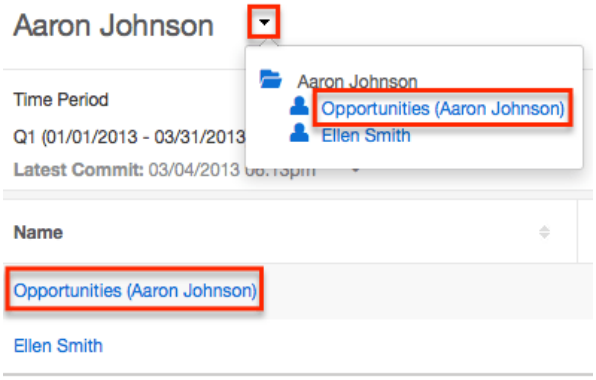
filters when working with your team worksheet and your reportees' forecasting data. On the right side of each page is an expandable intelligence pane which offers additional insight into your forecasting worksheet.

## Forecast Drilldown

Because sales managers are able to see and work with their reportee's revenue line items in addition to their own, these users will see an arrow next to their name at the top left of the Forecasts module. This allows them to drill into team forecasting data and individual sales representatives' revenue line items. By default, Aaron will enter the Forecasts module viewing his team worksheet which includes the total committed amounts and quotas for each immediate reportee and himself.

### Own Line Items

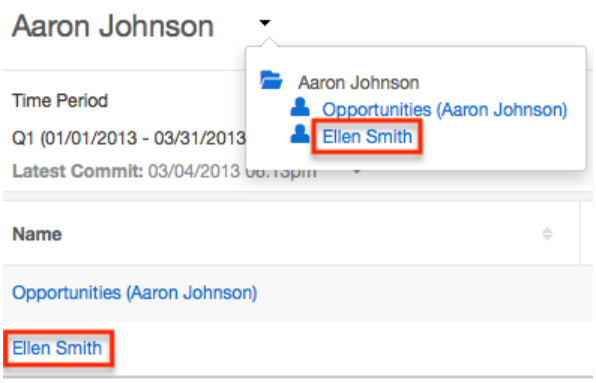
As a manager, Aaron can see and work with his own revenue line items by selecting "Aaron Johnson (me)" from the menu next to his name or from the Name column in his team worksheet below.




While working with his own revenue line items, he will have the same options on his worksheet as a regular sales representative has. For more information on working with a manager's forecasting worksheet, please refer to the Line Items and Totals section of this documentation. Aaron will need to commit his new revenue line items or changes to his revenue line items on his worksheet before the amounts will be reflected on his team worksheet.

### Reportee's Line Items

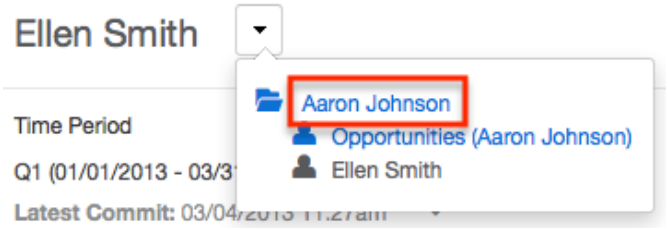
Since Aaron is Ellen's manager, Aaron also has the ability to work with Ellen's committed forecast and revenue line items. He can navigate to her committed worksheet by selecting "Ellen Smith" from the menu next to his name or from the Name column in his team worksheet below.



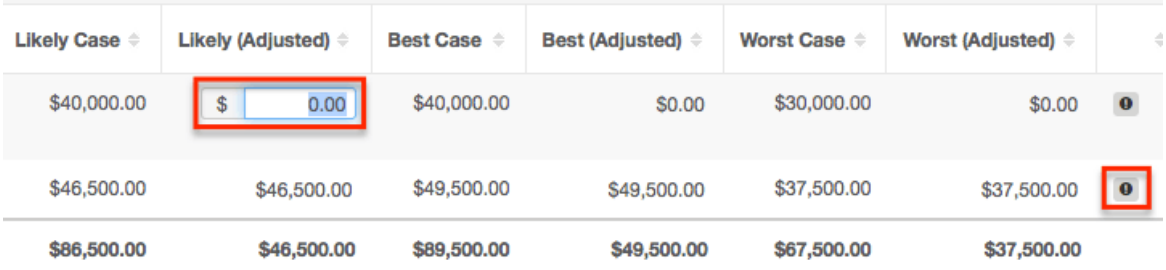

While viewing his reportee's worksheet, Aaron will not be able to edit any of the revenue line items' amounts or probabilities. He is able to filter for various ranges, change the time period, and view Ellen's summary and commit history for each time period.

Team Worksheet

Aaron can return to his team worksheet by choosing his own name from the Drilldown menu.




While viewing his team worksheet, he has the ability to set each team member's quota as well as to set adjusted Likely, Best, and Worst amounts. Please note that your worksheets may or may not include "Best" and "Worst" depending on your administrator's Scenarios configuration.To edit an adjusted amount or quota, click on the number, enter a new value, and click outside the text box or press Return/Enter. Clicking "Save Draft" will preserve these changes in the worksheet but will not push the changes to other Sugar users. Upon clicking "Commit", these adjusted amounts will be pushed to Aaron's manager thus appearing in Joy's worksheet as his committed amounts. Any changes to quotas will also be pushed to his reportee's worksheets.

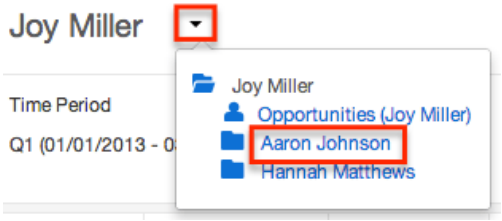


From the team worksheet, managers will see an "i" icon on the far right of each row where there are newly committed changes. Clicking the "i" opens the most recent commit history for that team member.

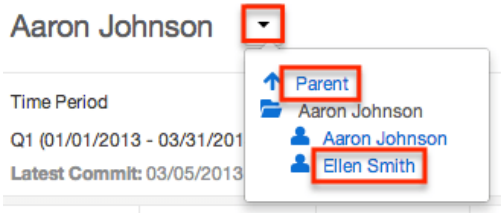
Note: Although it is possible for Aaron to set or alter his own personal quota, it is recommended that intermediate managers not make changes to their personal quota. Rather, Aaron's manager, Joy, should set the quota for his entire team from her team worksheet.

### Management Hierarchy

The ability to drill into a reportee's team worksheet and revenue line items continues up the management chain. Joy is Aaron's manager and views her own team worksheet by default when first opening the Forecasts module. She is also able to drill into her own revenue line items by clicking her own name, Aaron's team worksheet by clicking his name, or her other reportee's team worksheet.



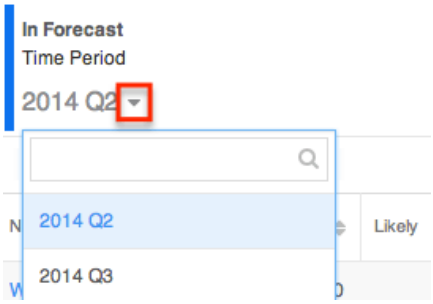

When Joy navigates to her reportee Aaron's team worksheet, Aaron's name now appears and his team worksheet is displayed in read-only mode. Joy can further drill down to see the worksheets of Aaron's team's members in read-only mode. This drilling can continue recursively down through the management chain as needed. Clicking "Parent" will move up one level of hierarchy, bringing Joy back to her own team worksheet.




## Time Periods

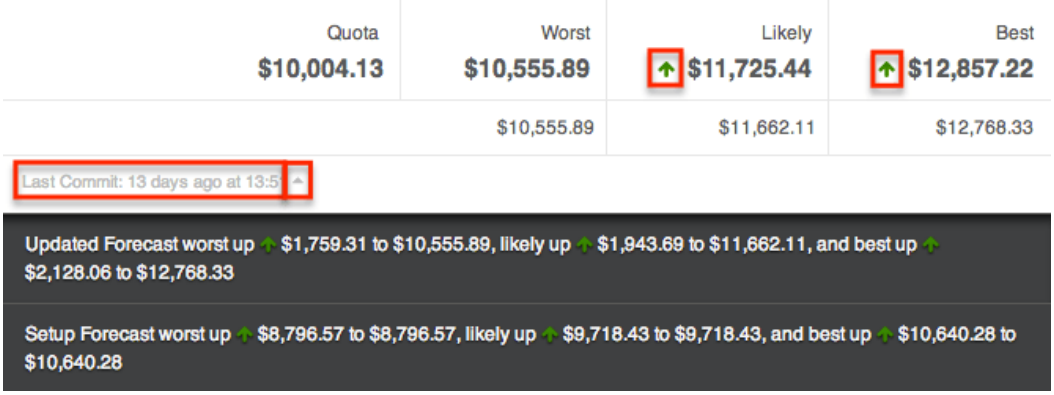
Below the currently selected drilldown name, you will see the time period for which you are forecasting to meet the time period's quota for your team. The length and start date of this time period depends on the Time Periods configuration set up by your administrator. At every level of drilldown, sales managers can click the arrow to the right of the current time period and choose a future or past time period, the availability of which is also determined by the administrator's Time Periods configuration. Select a past or future time period to

work with revenue line items and forecast for those periods.




## Summary and Commit History

To the right below the Time Period selection, you will see a summary of the current forecasting numbers for the time period and drilldown level currently in view. The large numbers are your current worksheet's Quota, Likely, Best, and Worst predictions. The smaller numbers show your most recent commit's Likely, Best, and Worst predictions. Any red or green arrows next to the large numbers on a manager's personal worksheet or own team worksheet show whether your worksheet's current (uncommitted) numbers are higher or lower than the most recent commit. Please note that you may or may not see a Best and Worst depending on your administrator's Scenarios configuration.



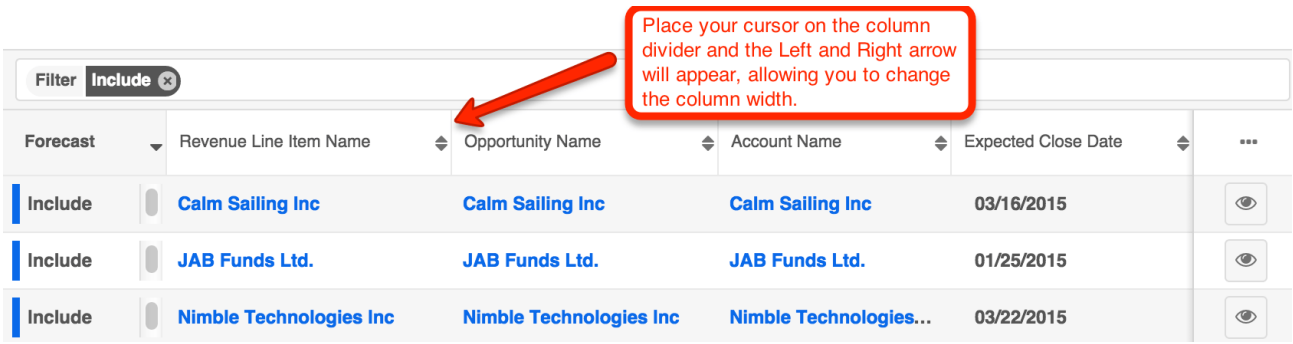

To the left of these summary numbers, you will see the date and time of the most recent commit. On a manager's personal worksheet and own team's worksheet, there will be no date and time shown if you have not yet committed for this time period. By clicking the arrow to the right of the latest commit date, a dark grey panel will appear showing a history of the commits for the worksheet currently in view for this time period along with the changes for each forecasting number from the previous commit.

## Column Resizing

You can easily adjust the size of columns in the forecasting worksheet based on your viewing preference. Simply place your cursor on the column divider, and

when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies.

Note: Sugar enforces a minimum width for currency fields (e.g. Best, Likely, etc.) in list view columns which prevents the columns from being collapsed beyond this limit.



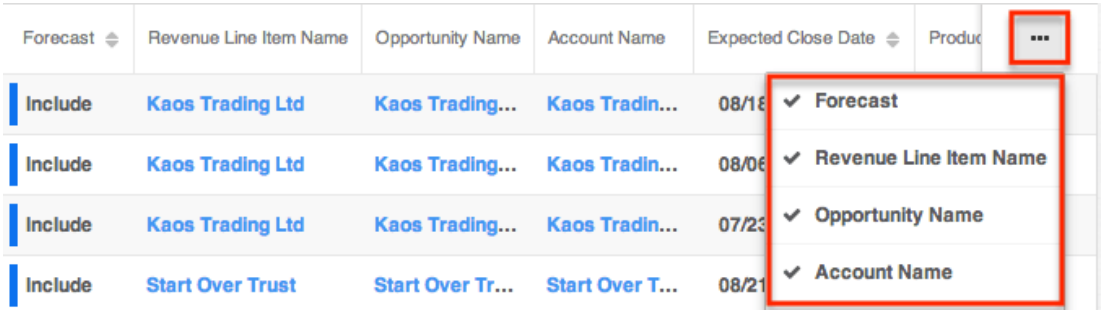

## Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. Please note that the list view may only be sorted by one column at a time.




## Column Selection

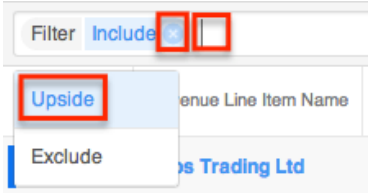
Sugar gives users the ability to personalize the list view by specifying which fields they want displayed in the list view. You can click the Column Selection icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column on your list view. Please note that administrators have the ability to configure what fields are available to display in the list view via Admin > Studio. For more information on configuring fields to display in the list view, please refer to the Studio documentation in the Administration guide.




## Filters

Below the summary and commit history of each worksheet, managers will see a filter bar which controls what kinds of revenue line items are displayed. By default, the "Include" filter will be active, meaning that only the revenue line items with a probability falling within the Include range specified during the administrator's Ranges configuration will be displayed. To add additional filters, click within the Filters bar and choose additional ranges. The filter(s) (e.g. Include, Exclude) added to the Filter bar will be preserved when you navigate away from the module. Returning to the Forecasts module will automatically display the revenue line items based on the filter(s) you last applied.

Please note the Upside or custom ranges may or may not be available depending on the administrator's Ranges configuration. To remove ranges from the filter, click the "x" for each filter name. Removing all filters will display all of your assigned revenue line items. Please note that when viewing your reportee's worksheets, only the revenue line items they have committed as included will be visible.

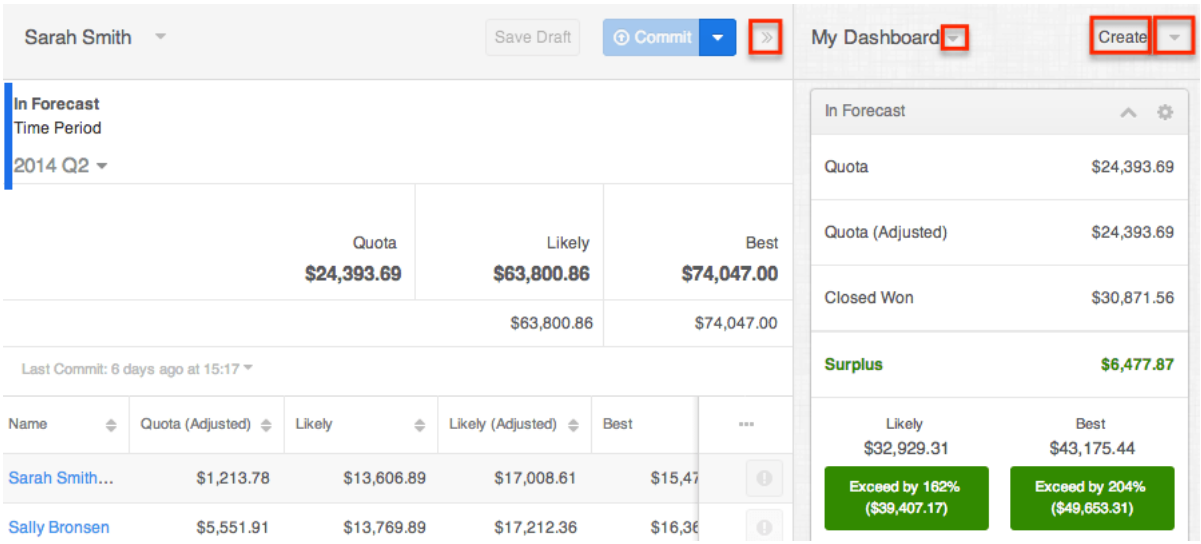



## Intelligence Pane

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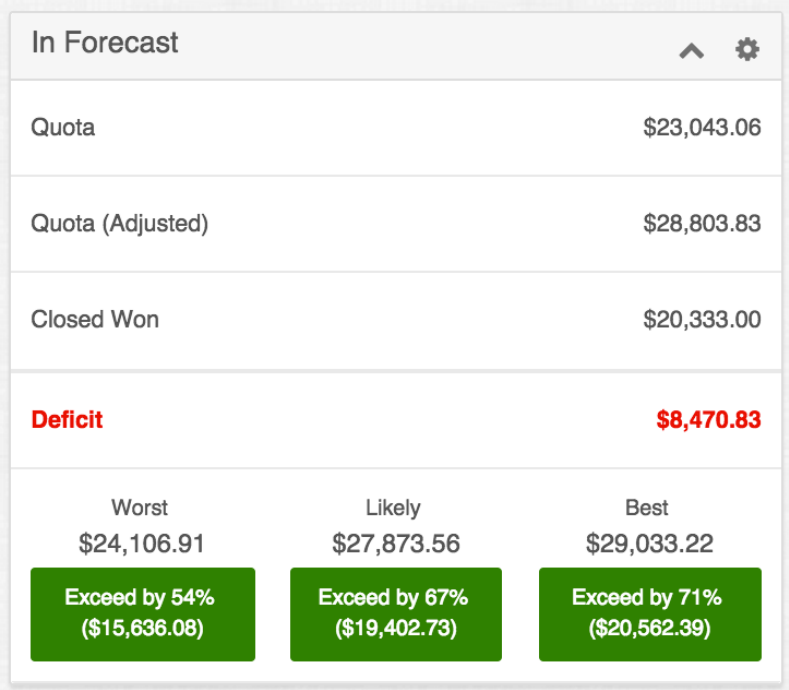
additional resources available to users. Simply click the appropriate link from the Help dashlet and the pages will open in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may create other dashboards for use with the Forecasts module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets (e.g. Saved Reports Chart Dashlet, etc.) to their dashboards.

The My Dashboard has two default dashlets which help provide additional insight into your forecasting worksheet, the In Forecast and Forecast Bar Chart dashlets.




In Forecast Dashlet

The In Forecast dashlet appears at the top of the Intelligence Pane and gives a breakdown of how your team's revenue line items match up to your quota. Please keep in mind that the In Forecast dashlet may or may not include "Best" and "Worst" depending on your administrator's Scenarios configuration.




The In Forecast dashlet's values are calculated based on the most recent updates to the worksheet even if the changes have not yet been saved as a draft or committed. The values take all of your and your team's revenue line items into account regardless of any filters currently being used in your worksheet. Their meanings are as follows:

| Field | Description |
|---|---|
| Quota | Your team's quota for this sales time period as assigned by your manager |
| Quota (Adjusted) | For mid-level mangers, your team's quota with an optional, manual increase above your team's assigned quota; when assigning quota to your reportees, this is the quota value they will receive |
| Closed Won | The total amount of your team's Closed Won revenue line items |
| Deficit | The difference between your team's adjusted quota and the total amount of your team's Closed Won revenue line items; the additional revenue needed to be won in order to meet your adjusted quota |
| Likely | The total of the Likely amounts for the included revenue line items which are not yet Closed Won |

| | |
|---|---|
| (Likely Colored Box) | When summing your team's Closed Won amounts and Likely amounts for included revenue line items, in red, the remaining quota shortage and percentage of quota still outstanding or, in green, the quota overage and percentage exceeded above quota |
| Best | (Optional) The total of the Best amounts for the included revenue line items which are not yet Closed Won |
| (Best Colored Box) | (Optional) When summing your team's Closed Won amounts and Best amounts for included revenue line items, in red, the remaining quota shortage and percentage of quota still outstanding or, in green, the quota overage and percentage exceeded above quota |
| Worst | (Optional) The total of the Worst amounts for the included revenue line items which are not yet Closed Won |
| (Worst Colored Box) | (Optional) When summing your team's Closed Won amounts and Worst amounts for included revenue line items, in red, the remaining quota shortage and percentage of quota still outstanding or, in green, the quota overage and percentage exceeded above quota |

When drilled into your own or a reportee's forecasting worksheet, the Quota (Adjusted) row will not be displayed and the dashlet will function as it does for sales representatives without reportees. For more information on the meanings and configuration of the table while viewing you or a reportee's worksheet, please refer to the In Forecast dashlet section within the Sales Representatives section of this documentation.

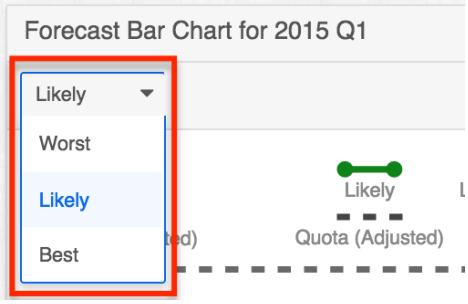
## Forecast Bar Chart Dashlet

The Forecast Bar Chart appears on the bottom of the Intelligence Pane and provides a configurable chart showing different cuts of your team members' forecasting data. Throughout all chart configurations, the dotted black line represents your adjusted quota for the given time period and can be hovered over to view the quota amount.

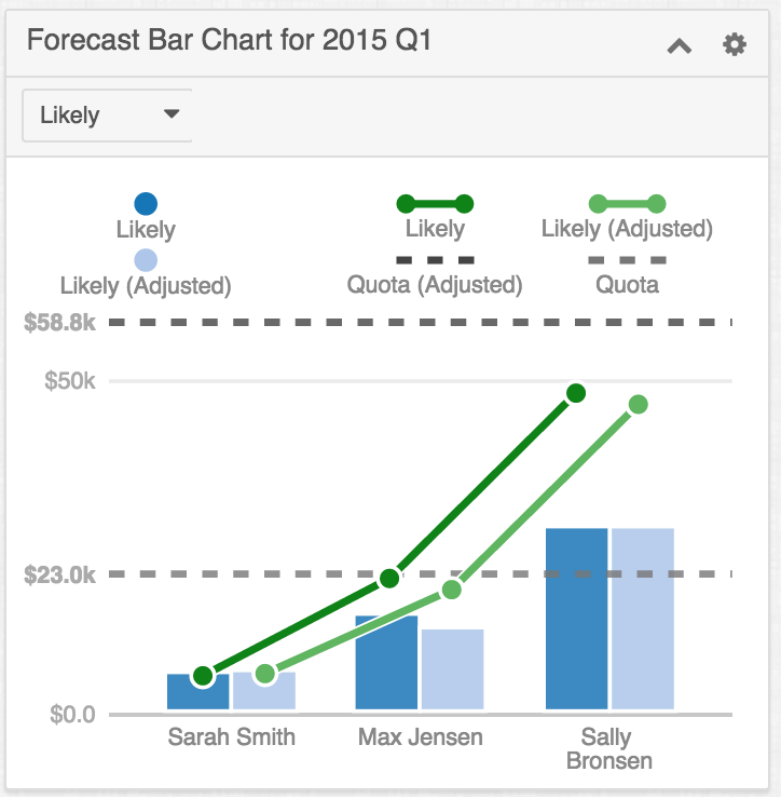
While viewing your or a reportee's worksheet, the charts will display the relevant revenue line items over the course of the selected time period. In these views, the charts function in the same way as they do for support representatives without reportees. For more information on the meanings and configuration of the chart while viewing your or a reportee's worksheet, please refer to the Forecast Bar Chart section within the Sales Representative section of this documentation.

While viewing your or a reportee's team worksheet, the charts will display the current worksheet's totals in bars grouped according to user. Throughout all chart configurations, the dotted black line represents the worksheet's adjusted quota for the given time period and can be hovered over to view the quota amount.

Use the dropdown menu to configure what is displayed in the chart.




When "Likely" is chosen, each light blue bar represents the total committed Likely amount for each user within the current team worksheet. Each dark blue bar represents the total adjusted Likely amounts for each user. The green dots show the cumulative Likely total of the team built user-by-user from left to right with the rightmost point representing the total Likely amount for the entire team. The light green dots and line do the same using the adjusted Likely team total.

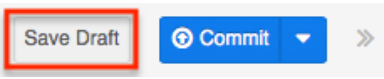



Choosing "Best" shows similar chart elements except that the Best and adjusted Best amounts are used. Choosing "Worst" does the same with Worst and adjusted Worst amounts.

Note: You may or may not see "Best" and "Worst" as options in the second dropdown depending on your administrator's Scenarios configuration.

## Saving Forecast Drafts

Whenever new information is added or changes are made to your current forecasting worksheet, the Save Draft button will become activated. Click this button to save your changes to the current worksheet without submitting these changes to your manager. This provides an opportunity to work with your forecast data before pushing more finalized amounts up the management chain. Clicking "Save Draft" will also cause any changes to your personal revenue line items' amounts and/or probability to alter the revenue line item record itself, making these new numbers visible on the revenue line item in other areas of Sugar.




## Committing Forecasts

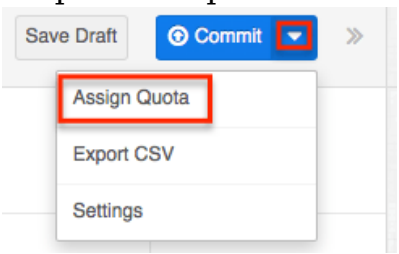
Whenever new information is added or changes are made to your current forecasting worksheet, the Commit button will become activated. Click this button to save your changes to the current worksheet and to submit these changes to your manager or to the team worksheet if you are a manager working on your personal worksheet. Clicking "Commit" will also cause any changes to your personal revenue line item' amounts and/or probability to alter the revenue line item record itself, making these new numbers visible on the revenue line item in other areas of Sugar.

For sales managers, changes to your reportees' quotas will appear their Forecasts module you perform a commit or when using the Assign Quota option. Either action will also cause changes to your and your reportee's quotas to be reflected in the Projected table of the Intelligence Pane.



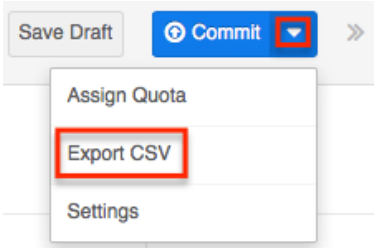

## Assigning Quotas

After a manager makes changes to the quotas for his or her reportees, the new quota will become visible in the reportee's Forecasts module when the manager clicks Assign Quota from the Actions menu in addition to when they commit their forecast. Either action will also cause changes to your and your reportee's quotas to be reflected in the Projected table of the Intelligence Pane.



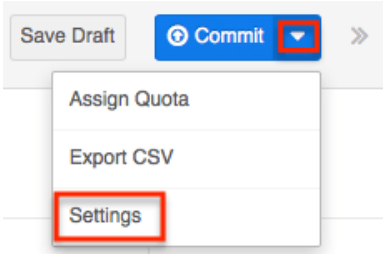

## Exporting Forecasts

The Export option is available on every forecasting page and exports every line of the current worksheet. The resulting CSV file can be used in other programs such as Microsoft Excel to view and manipulate your forecasting data. To export your current worksheet, click "Export CSV" in the Actions menu.



## Configuring Forecasts

Users with administrator access will have a Settings option available within the Forecasts module. Choosing "Settings" will open the Forecast Configuration wizard which is also available by navigating to Admin > Forecasts. For more information on configuring the Forecasts module, please refer to the Forecast Configuration documentation in the Administration Guide.




Last Modified: 10/11/2016 06:34pm

# Quotes

## Overview

Sugar's Quotes module consists of quotes which specify the quantity and the price per unit for products or services that your organization is selling to clients. You can select a product directly from the product catalog or manually enter a product that is not in the catalog during quote creation. There are various ways you can create quotes in Sugar such as via the Quotes module and duplication. Once created, you can generate the quote in PDF format (i.e. Quote or Invoice) and send it to your clients. This documentation will go over the basics of the Quotes module as well as the various options available in performing the actions related to the module.

## Quote Fields

The Quotes module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

| Field | Description |
|---|---|

| | |
|---|---|
| Actual Close | The date the quote order shipped |
| Actual Close Date | The date the quote is closed |
| Assigned To | The Sugar user assigned to the quote |
| Billing Account Name | The account to which the quote is billed |
| Billing Address | The billing address of the account paying for the product or service |
| Billing Contact Name | The contact associated with the Account to whom the quote is billed |
| Copy Address From Left | Select the box to copy the account's billing address to the shipping address field |
| Converted Amount | The amount of the quote converted to and displayed in the system's default currency or the user's preferred currency when the Show Preferred Currency option is enabled on the viewing user's profile<br><br>Note: This field is only available in the list view. For more information on the Converted Amount field, please see Transaction Amount Field Vs. Converted Amount Field |
| Date Created | The date the quote record was created |
| Date Modified | The date the quote record was last modified |
| Description | A description or other information about the quote |
| Discount | The discounted amount (if applicable) for the quote |
| Discounted Subtotal | The discounted subtotal for the quote |
| Display Grand Total | Indicate if the grand total should be displayed |
| Display Line Numbers | Indicate if the line numbers should be displayed |
| Opportunity Name | The opportunity name associated with the quote |
| Order Stage | The current order stage (e.g. Pending, Confirmed, etc.) of the quote |
| | |

| | |
|---|---|
| Original P.O. Date | The date of the original purchase order |
| Payment Terms | The time period within which the client must pay for the product or service |
| Purchase Order Num | The purchase order number of the quote |
| Quote Number | The system-generated quote number |
| Quote Stage | The current stage of the quote's life cycle (e.g. Draft, Confirmed, etc.) |
| Quote Subject | Information or detail about the product or service for which you are creating the quote |
| Quote Type | The quote type |
| Shipping | The shipping amount for the quote |
| Shipping Account Name | The account to which the products will be delivered |
| Shipping Address | Address to which the products will be delivered |
| Shipping Contact Name | Contact associated with the Account to whom the products will be delivered |
| Subtotal | The subtotal for the quote |
| Teams | The Sugar team(s) assigned to the quote record |
| Tax | The tax rate for the quote |
| Total | The total amount of the quote |
| Total Discount | The total discount for the line item in the quote |
| Transaction Amount | The transactional amount of the quote which may use any currency configured within Sugar<br><br>Note: For more information on the Transaction Amount field, please see Transaction Amount Field Vs. Converted Amount Field |
| Valid Until | The date until which this quote is valid |

## Quote Stages

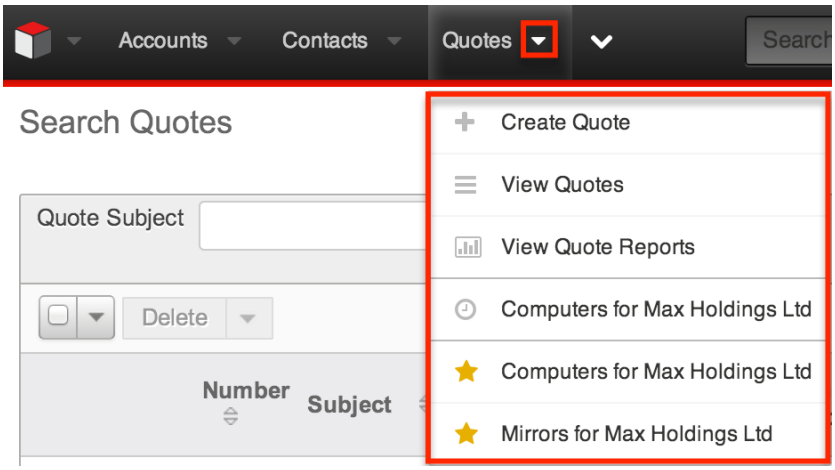
The quote stage defines the current stage (e.g. Draft, Confirmed, etc.) of your

quote's life cycle. There are eight quote stages which come out-of-the-box with Sugar and users with administrator or developer access have the ability to modify the quote stages via Admin < Dropdown Editor. For more information on modifying the quote stage, please refer to the Developer Tools documentation in the Administration guide. The below definitions are suggested meanings for each quote stage, but the stage's can be leveraged differently to best meet your organization's needs.

| Quote Stage | Description |
|---|---|
| Draft | The draft version of the quote is currently being created for the client |
| Negotiation | Communicated with the client and modifying the details of the quote |
| Delivered | The updated quote is delivered to the client |
| On Hold | Awaiting input on quote |
| Confirmed | The quote is approved for sale |
| Closed Accepted | Client accepts the terms of the quote and agrees to proceed with the sale |
| Closed Lost | Client does not agree to the terms of the quote and the sale is lost |
| Closed Dead | Possible lack of communication from the client and the sale is lost |

## Quotes Module Tab

The Quotes module tab is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access the Quotes list view. You may also click the triangle in the Quotes tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of quotes you last viewed in the module. The Favorites Menu displays the list of quotes you most recently marked as favorites in the module.




The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|---|---|
| Create Quote | Opens the edit view layout to create a new quote |
| View Quotes | Opens the list view layout to search and display quotes |
| View Quote Reports | Displays existing reports based on the Quotes module |

If you do not see the Quotes module tab in Sugar, please check the following:

- The Quotes module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Quotes module in the Hide Modules list, simply move it to the Display Modules list and save. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Quotes module for your entire Sugar instance. Reach out to your Sugar administrator to have the Quotes module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

## Creating Quotes

There are various methods for creating quotes in Sugar including via the Quotes module and duplication. The full edit view layout opens when creating the quote directly from the Quotes menu and includes all of the relevant fields for your

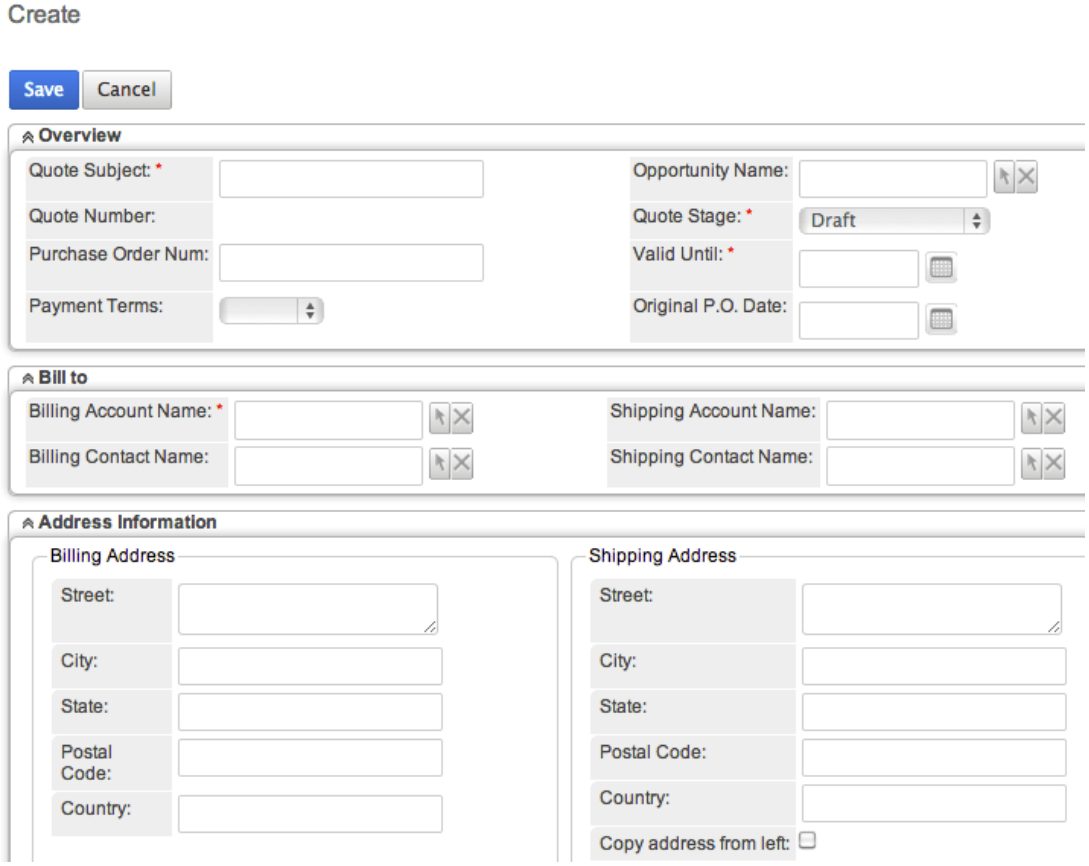
organization's quotes. The Edit View layout can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

## Creating Via Quotes Module

One of the most common methods of quote creation is via the Create Quote option in the Quotes module tab. This opens up the edit view layout which allows you to enter in all the relevant information (e.g. Basic Information, Line Items, etc.) for the quote. Once the product details are entered in the quote's line item(s), Sugar will automatically calculate and display the subtotal, discount (if applicable), tax, shipping, and total for each group as well as a grand total for the entire quote.

### Basic Information

The first part of creating a quote is to complete the basic information sections (e.g. Overview, Bill to, Address Information). Enter the appropriate values for the fields




### Adding Groups

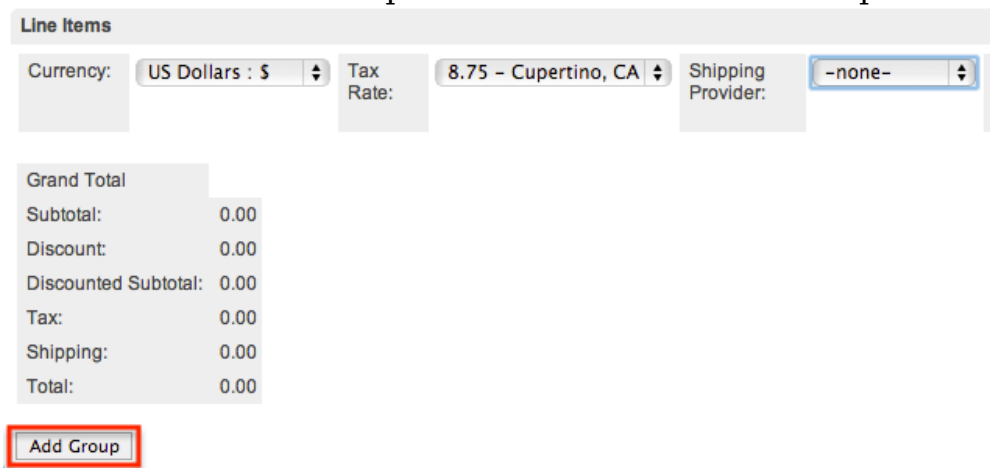
The Line Items section allows users to add products from the product catalog and

arrange them in groups. Prior to adding the groups and products, you can define the currency, tax rate, shipping provider, etc. if different from the default value selected. Please note that users with administrator or developer access have the ability to configure the Currency, Tax Rate, and Shipping Provider fields via Admin > Currency, Admin > Tax Rates, and Admin > Shipping Providers. For more information on configuring these fields, please refer to the System as well as the Products and Quotes documentations. The Display Grand Total and Display Line Numbers checkbox is marked by default, but you can uncheck it if you do not wish to have the grand total or line numbers displayed on the quote.

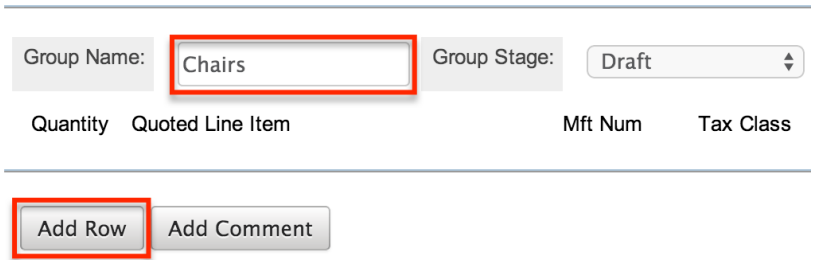
You can add multiple groups (e.g. chairs, tables, etc.) to your quote to arrange similar products and/or services together for better organization. For example, you can add a group called "Chairs" then add the different types of chairs that the client is purchasing under this group.

Use the following steps to add a new group to your quote:

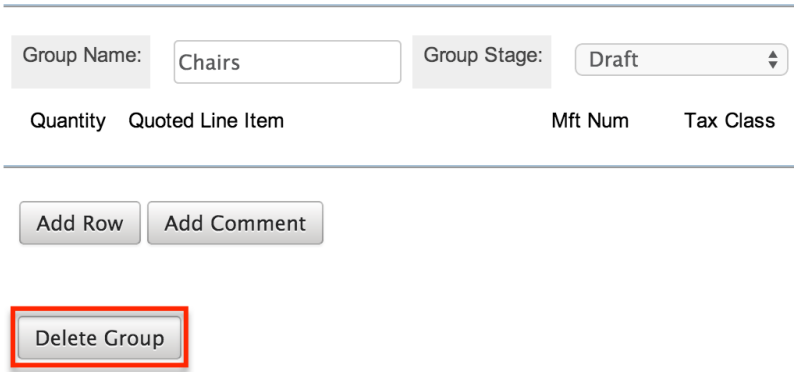
1. Scroll to the Line Items panel and click the Add Group button.




2. Enter in a group name then click the Add Row button to add products to this group.
    - By default, "Draft" is selected as the group stage, but you can change this accordingly.




3. To delete a group, click the Delete Group button.



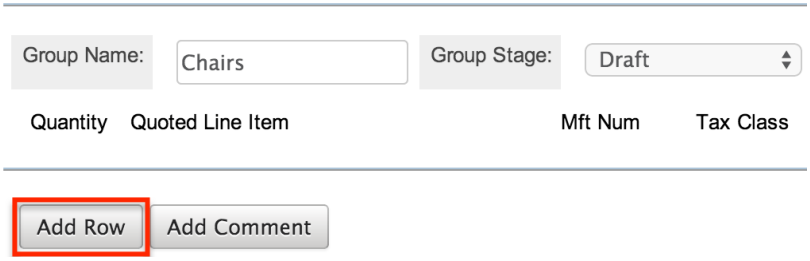

Adding Rows

Once you create a group, use the Add Row feature to add products to the group. You have the option of selecting a product from the product catalog or manually entering a new product, not in the catalog. When you select the product from the catalog, the system automatically populates the manufacturer's number, tax class, cost, list, etc. You cannot modify the line item information for selected products as the value is pulled directly from the product catalog. Please note that system administrators must first create and add products via Admin > Product Catalog in order for users to select it when adding line items. For more information on adding and modifying products in the product catalog, please refer to the Product Catalog section of the Product and Quotes documentation. New products entered in the quote can have the manufacturer number, tax class, and pricing information manually entered. Please note that products you manually enter into the quote will not be added to the product catalog as only administrators have the ability to create them.

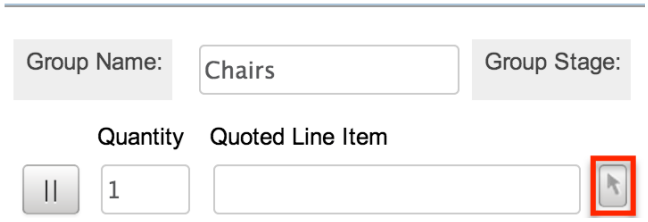
The product(s) added to each quote line item will create a new record in the Quoted Line Items module when the quote is saved. For more information on creating product records, please refer to the Quoted Line Items documentation.

Use the following steps to add a row and select a product from the Product Catalog:

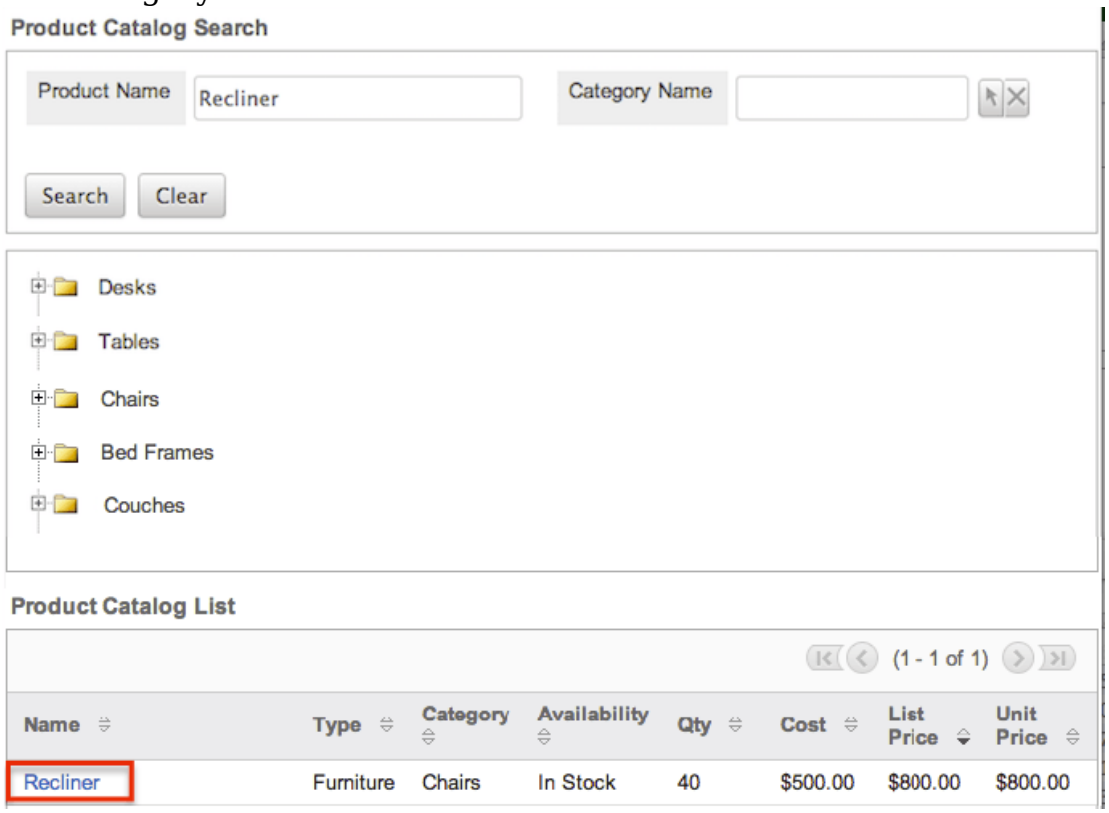
1. Click "Add Row" in the Group section.



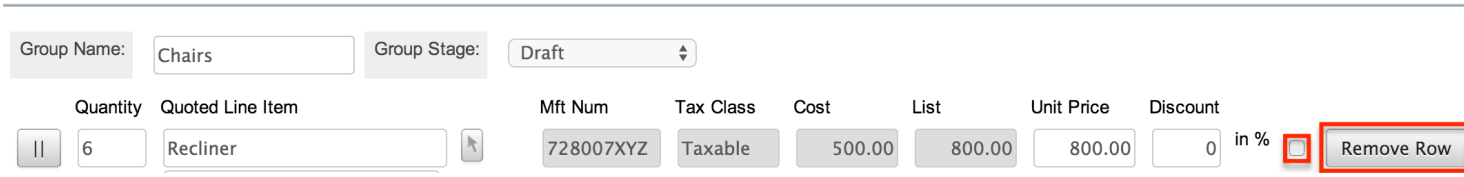

2. Click the arrow next to the Product field to select from the Product Catalog list.




3. Locate and select the desired product in the pop-up window to add to your group.
    - You can also use the Search panel to search for a product by name and category.

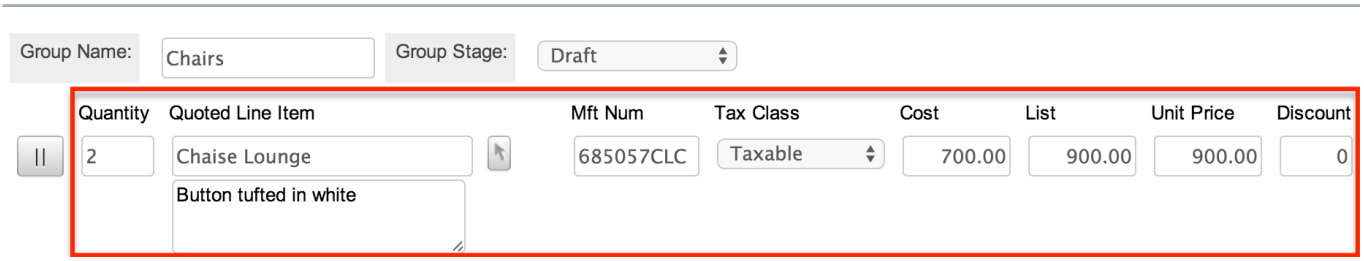



The selected product will be added to the group with the populated line items (grayed out). You can modify the quantity and unit price as well as enter in a discount (if applicable) if you wish. Please note that you can input the discount in absolute price or mark the checkbox if you would like to indicate the discount as a percentage of the unit price. For a description of the line item fields (e.g. Cost, List, etc.), please refer to the Product Catalog Fields section in the Products and Quotes documentation. Please note that any products that should not be included in the quote can be easily removed by clicking "Remove Row" to the far right of each product row.



Use the following steps to add a row and manually enter a product in the group:

1. Click "Add Row" in the Group section.
2. Manually enter in the product name along with the manufacturer number, tax class, cost, etc. to add to your group.
    - For a description of the line item fields (e.g. Cost, List, etc.), please refer to the Product Catalog Fields section in the Products and Quotes documentation.

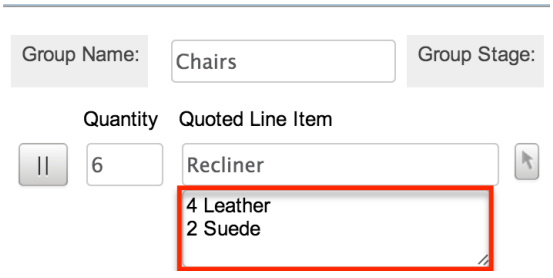



Note: Products that are manually entered into quotes will not be added to your product catalog, but will be added as new product records in the Quoted Line Items module.

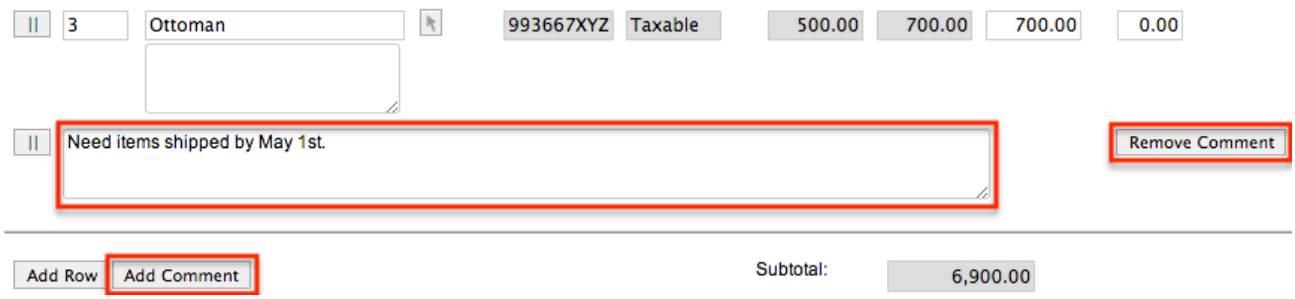
Adding Comments

Users have the option to enter comments for individual products as well as add comments as a line item in the group. Please note that all comments entered will appear on both the Quote and Invoice PDF documents.

Use the open text box below each product to enter any product-related information.




To add a comment for the group, click the Add Comment button and the comment box will be added as a line item. You can remove any group comments that are not needed by clicking "Remove Comment" to the right of the comment box.

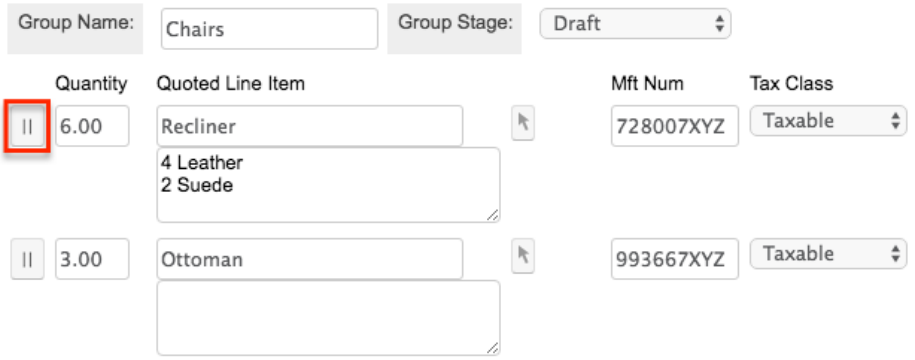



Rearranging Line Items

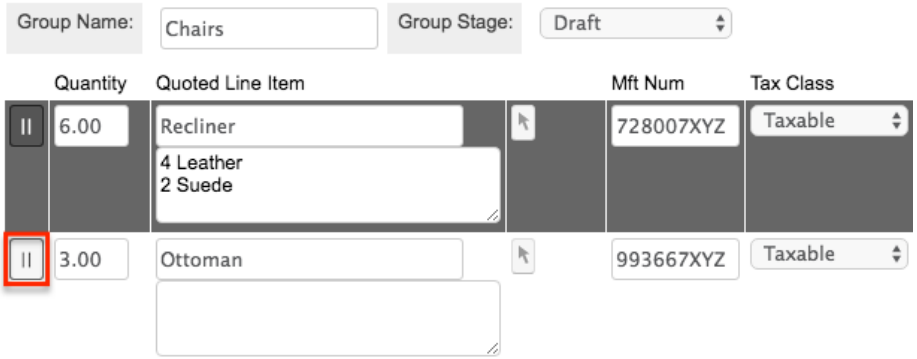
Users also have the ability to rearrange quote line items (e.g. rows and comments) by placing them in different positions within the group per their personal preference.

The following steps cover moving the Recliner line item to the Ottoman line item location as an example:

1. Click the double vertical bar icon to the left of the Recliner line item row.

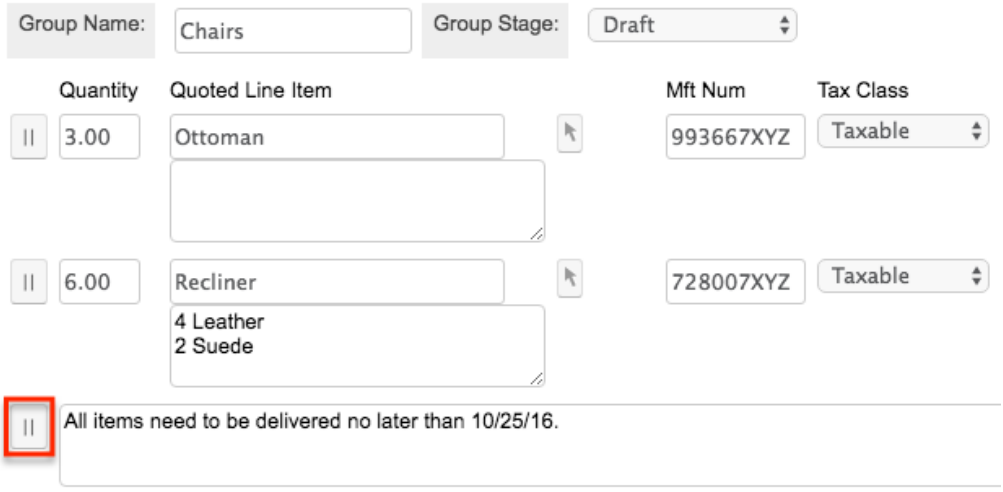



2. Now, click the double vertical bar icon to the left of the Ottoman line item row.




Once you click the second double vertical bar icon, the Recliner line item will swap positions with the Ottoman line item and display in the second row. Please note

that you can also rearrange any comment line item rows by following the same steps above.




## Creating Via Duplication

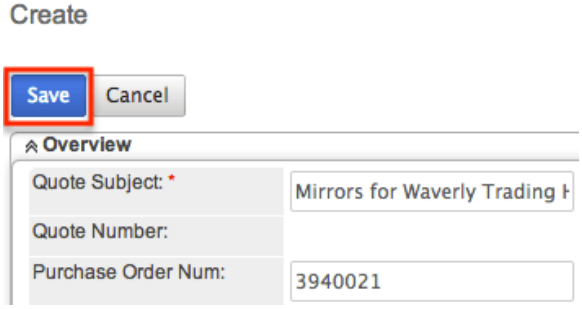
You can also create a new quote by duplicating an existing quote record. The duplicate option is useful if the quote you are creating has similar information to an existing quote.

Use the following steps to create a quote by duplicating an existing record:

1. Navigate to a quote record's detail view.
2. Select "Copy" from the Actions menu.




3. The displayed edit view is pre-populated with the original quote's values. Update the necessary fields, then click "Save".



# Viewing Quotes

There are various options available for viewing quote records in Sugar including via Quotes list view, Quotes detail view, Quotes Recently Viewed menu, dashlets, and reports. Please note that you will only be able to see quote records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

## Viewing Via List View

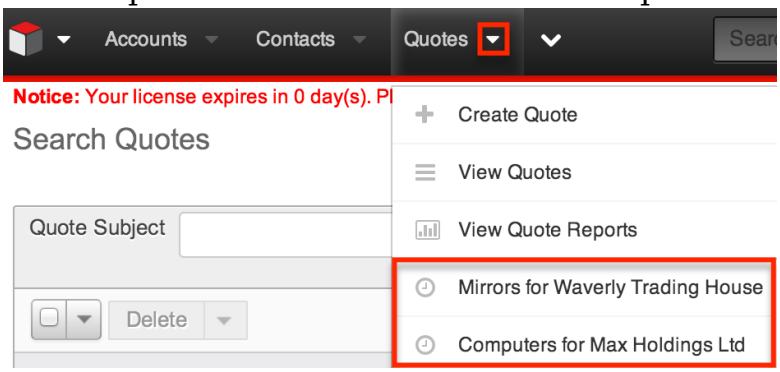
The Quotes list view displays all quote records meeting the current search criteria. To access the list view, simply click the Quotes module tab. While list view shows key quote fields, you can click the quote's name to open the record in detail view. For more information on viewing quotes via list view, please refer to the Quotes List View section of this documentation.

## Viewing Via Detail View

The Quotes detail view displays thorough quote information including all quote fields followed by subpanels of the quote's related records belonging to various modules. The detail view can be reached by clicking a quote record's link from anywhere in the application including from the Quotes list view. For more information on viewing quotes via detail view, please refer to the Quotes Detail View section of this documentation.

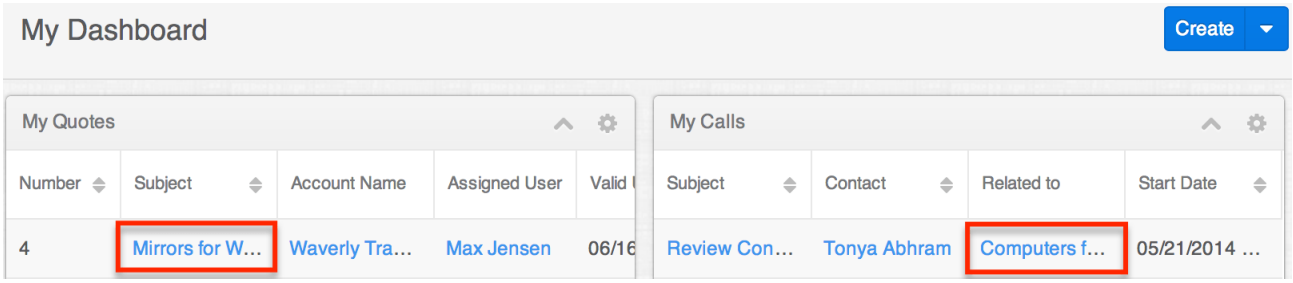
## Viewing Via Recently Viewed

As you work, Sugar will keep track of which quotes you have recently viewed. Click the Actions menu in the Quotes module tab to see a list of your most recently viewed quotes and click each name to open the Quotes detail view.



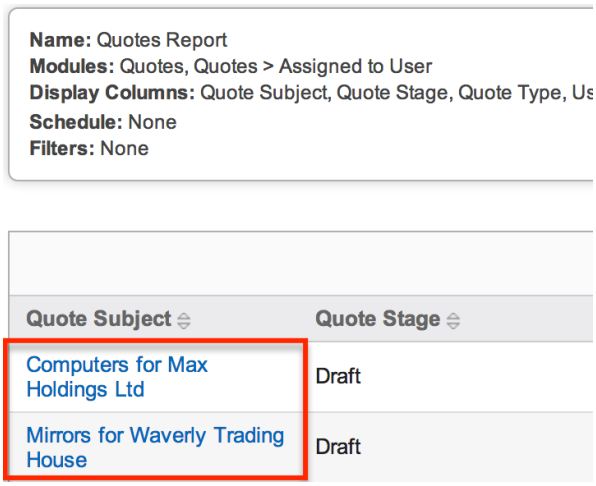
## Viewing Via Dashlets

Sugar Dashlets allow users to get a quick view of various records, activities, reports, etc. Dashlets may be added to a user's Home page or to the intelligence pane of any Sidecar module (e.g. Accounts). You can view quote information in List View dashlets specific to the Quotes module (e.g. My Quotes dashlet), as well as List View dashlets based on other modules such as "My Calls". Clicking a quote's name from any dashlet will open the Quotes detail view. For more information on using dashlets and viewing quote records via dashlets, please refer to the Intelligence Pane documentation.




## Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding quotes and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the quote record's detail view by clicking the quote's name in the report results. Please note that you can only directly access quote detail views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation.



Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

## Searching Quotes

The Quotes list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Quotes list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.

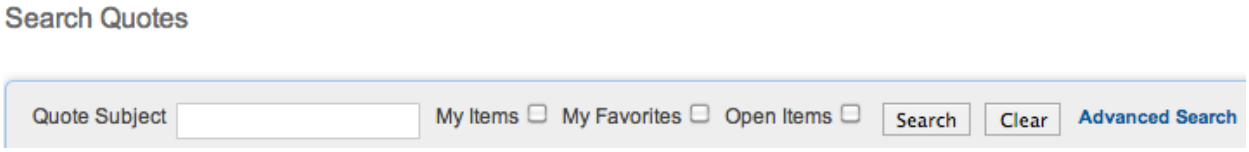
For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

### Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic search panel, you can click "Advanced Search" to access additional search functionality as needed.

The buttons and checkboxes available in the Basic Search panel have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Items : Select this box to return only records assigned to you.
- My Favorites : Select this box to return only records you have marked as favorites.
- Open Items : Select this box to return only records with an open stage (e.g. Draft, Negotiation, etc.).




When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Items" and enter in a quote subject to search, Sugar will only return the quote records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all quote records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see quote records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation.

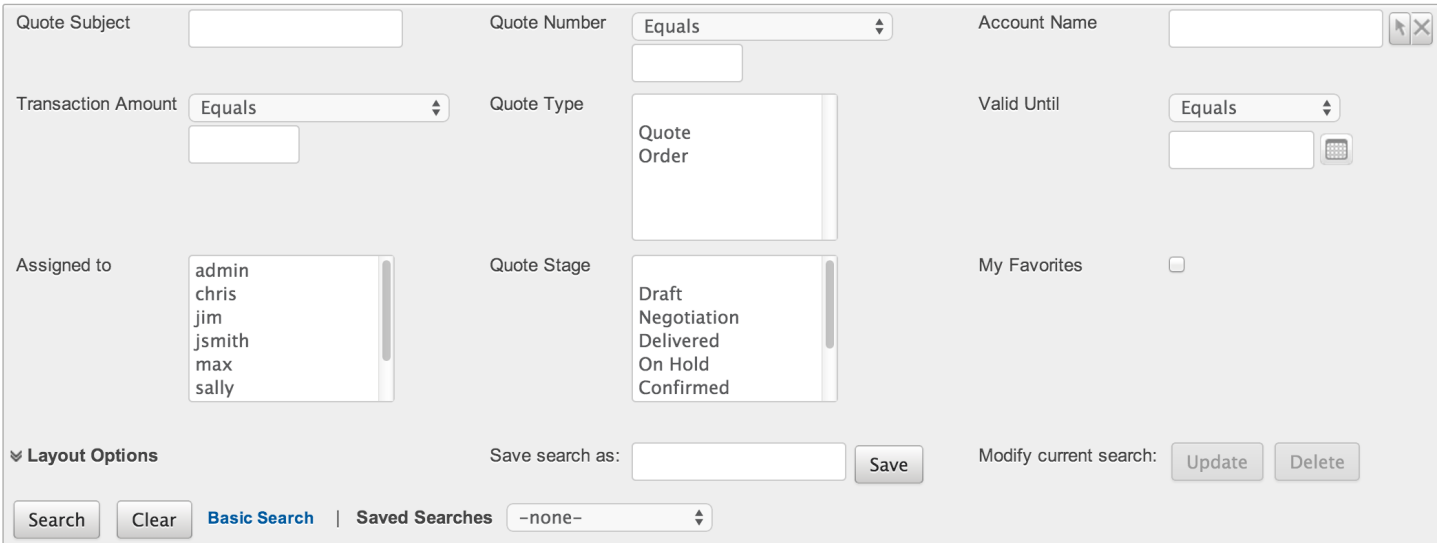
Administrators can configure what fields appear on the Quotes Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Advanced Search

Advanced Search offers a more in-depth search experience than Basic Search including additional fields, layout options, and saved search capability. From the Advanced search panel, you can click "Basic Search" for simplified searching.

The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Favorites : Select this box to return only records you have marked as favorites.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the Layout Options section of the Search documentation.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section of the Search documentation.




When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Favorites" and enter in a quote subject to search, Sugar will only return the quote records with a matching name that are marked as favorites. When searching by a multiselect or dropdown field (e.g. "Assigned to"), however, Sugar will return records matching any of these selections. Once the search completes, the relevant results will populate in the list view below the search panel. To see all quote records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see quote records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation.

Administrators can configure what fields appear on the Quotes Advanced Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search may be used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.



To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the Search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

## Quotes List View

The Quotes list view displays all quote records meeting the current search criteria to which your user has access. You can view the basic details of each quote within the field columns. Please note that you will only be able to see quote records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

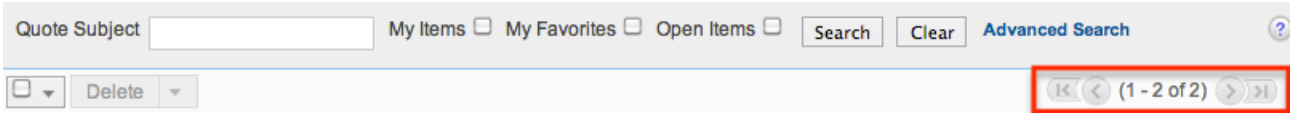
You have the option to change what fields are displayed in list view by configuring your layout options available in Quotes Advanced Search. For more information on configuring your list view, please refer to the Layout Options section of the Search documentation. Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

### Pagination

List view displays the current search results broken into pages that you can scroll through rather than potentially displaying thousands of rows at once. To the right just below the search panel you can see which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of your current

results.

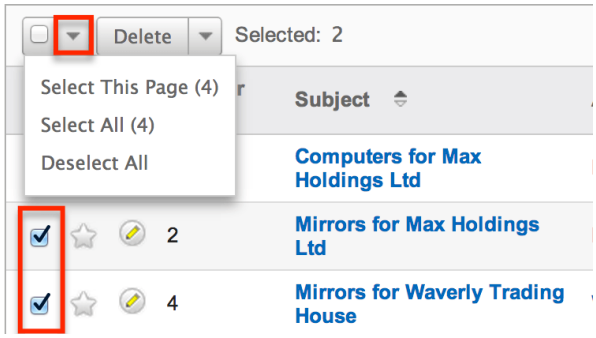
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.




## Checkbox Selection

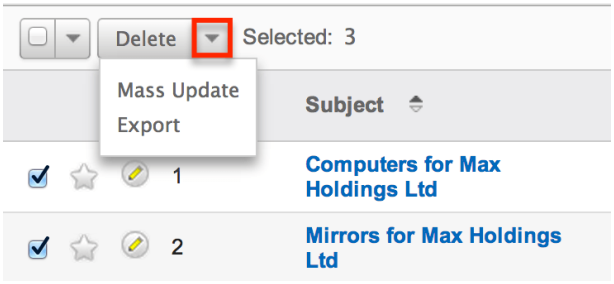
You can perform several actions on quote records directly from the list view by first selecting the desired records. To select individual quote records on the Quotes list view, mark the checkbox on the left of each row. To select or deselect multiple quote records on the list view, use the options in the checkbox dropdown menu.

- Select This Page : Selects all records shown on the current page of quote results.
- Select All : Selects all records in the current search results across all pages of quote results.
- Deselect All : Deselects all records that are currently selected.




## Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.

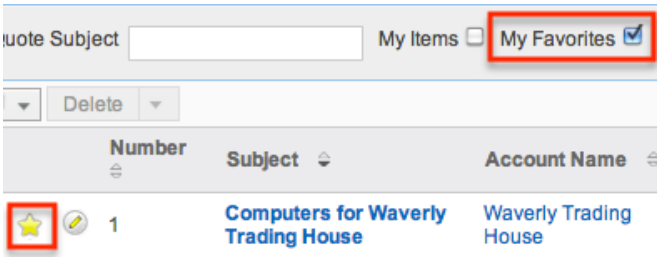



The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Delete | Delete one or more quotes at a time |
| Mass Update | Mass update one or more quotes at a time |
| Export | Export one or more quotes to a CSV file |

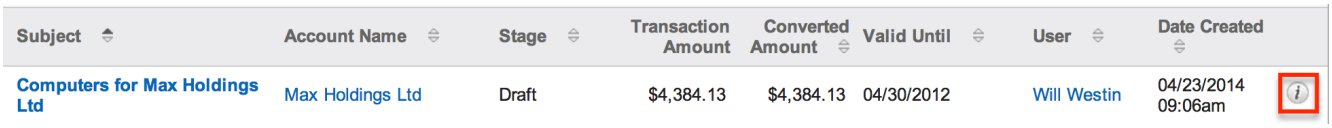
## Favorite Designation

Users have the option to mark quote records as favorites via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Quotes module tab. In the Quotes list view, the star on the left of each quote's row is yellow once marked to indicate a favorite quote. For more information on how to mark records as favorites, please refer to the Favoriting Quotes section of this documentation.




## More Information

Additional details for each quote can be viewed by clicking the "i" icon to the far right of each list view row. This provides users a quick view of additional quote information in addition to what appears in the display column fields. The resulting pop-up window will show the Purchase Order Number, Original P.O. Date, Billing Address, Shipping Address, Subtotal, Tax, Shipping, Total, and Description fields by default. The list of fields appearing here may only be configured through a code-level customization.



| Subject | Account Name | Stage | Transaction Amount | Converted Amount | Valid Until | User | Date Created |
|---|---|---|---|---|---|---|---|
| Computers for Max Holdings Ltd | Max Holdings Ltd | Draft | $4,384.13 | $4,384.13 | 04/30/2012 | Will Westin | 04/23/2014 09:06am |

## Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. Please note that the list view may only be sorted by one column at a time.



| Number | Subject | Account Name |
|---|---|---|
| 1 | Computers for Waverly Trading House | Waverly Trading House |

## Transaction Amount Field Vs. Converted Amount Field

The stock Quotes list view contains two fields, Transaction Amount and Converted Amount, that differ in functionality. When the viewing user's Show Preferred Currency option is selected in their user profile, the Converted Amount field will be displayed in the user's preferred currency. When it is unchecked, the Converted Amount field will be displayed in the system default currency. For information about setting a user's Preferred Currency and Show Preferred Currency options, please refer to the Getting Started documentation.

The primary differences between these fields and options are as follows:

| Field Name | Value Displayed | Sortable in List View | Method to Update Value |
|---|---|---|---|
| Transaction Amount | Transactional amount; the currency and value in which the quote was last saved | No; this field may include values using different currencies, so numerical sorting would not result in a valid ordering of the comparative amounts | Updated by editing the quote record |
| Converted Amount (system default currency) | Transaction Amount converted to the system default currency | Yes; all possible values use a single currency, so sorting is allowed | Updated by a scheduled process when the relevant exchange rate is |

| | | | |
|---|---|---|---|
| | based on the system-defined conversion rate | | modified via Admin > Currencies. For more information on how currency changes affect the Converted Amount value please see Updating Currency Rates |
| Converted Amount (user's preferred currency) | Transaction Amount converted to the viewing user's preferred currency as specified in their user profile based on the system-defined conversion rate | Yes; all possible values use a single currency, so sorting is allowed | Updated by modifying the relevant exchange rate via Admin > Currencies. For more information on how currency changes affect the Converted Amount value please see Updating Currency Rates |

## Quotes Detail View

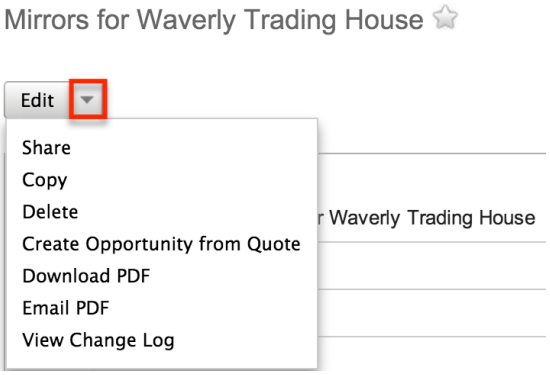
The Quotes detail view displays thorough quote information including all quote fields which are grouped by default into the Overview, Bill to, Address Information, and Other panels. The Line Items panel displays as well to show the details of products being purchased arranged by groups. You can also view a quote's related records (Activities, History, Documents) which appear in subpanels beneath the quote fields. The detail view can be reached by clicking a quote record's link from anywhere in the application including from the Quotes list view.

Please note that you will only be able to view a quote record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

### Actions Menu

The Actions menu on the top left of each quote's detail view allows you to perform

various actions on the current record. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the System documentation in the Administration guide.

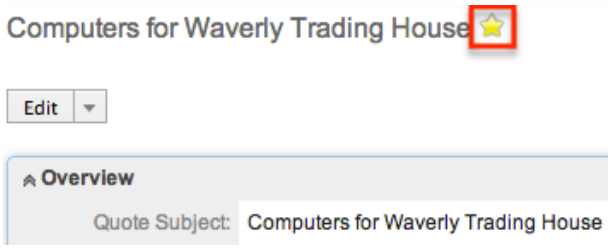



The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this quote |
| Share | Share a link to this quote via email |
| Copy | Duplicate this quote |
| Delete | Delete this quote |
| Create Opportunity from Quote | Use this quote information to create an opportunity record |
| Download PDF | Download this quote in PDF format |
| Email PDF | Email this quote as a PDF attachment |
| View Change Log | View a record of changes to this quote |

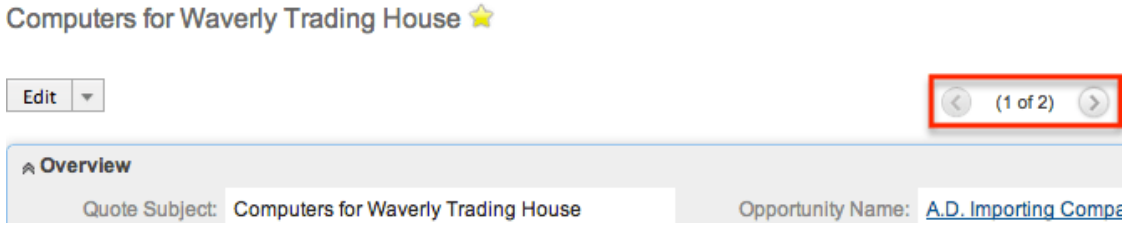
## Favorite Designation

Users have the option to mark quote records as a favorite via the detail view as well as the list view. This allows users to designate records that are important or will be viewed often as they can easily be accessed via search or from the Quotes module tab. In the Quotes detail view, the star on the right of the quote's name is yellow once marked to indicate a favorite quote. For more information on how to mark records as favorites, please refer to the Favoriting Quotes section of this documentation.




## Next or Previous Record

On the upper right of the Quotes detail view, there are two buttons that allow you to page through each quote in the Quotes list view's current search results. Clicking the Previous button displays the previous quote of the current search results while clicking the Next button displays the next quote of the current search results. The text in between shows which quote result you are currently viewing within the total number of current results.




## Subpanels

Beneath a quote record's fields are subpanels containing related records from various modules.

### Related Record Subpanels

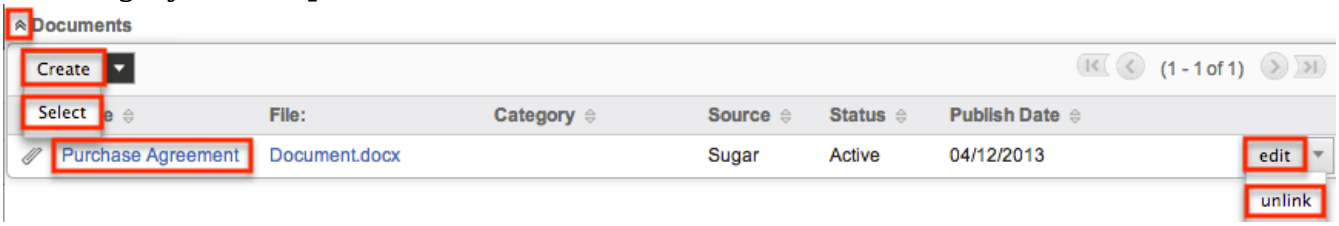
The most common type of subpanel displayed on a quote's detail view contain the quote's related records belonging to the Documents module. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. For example, multiple quotes may be related to an opportunity, which means that the related opportunity will be displayed in a relate field in the quote's Overview panel.

Users with administrator or developer access have the ability to change the fields (e.g. Name, Assigned User, etc.) and labels of the subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.

Related record subpanels allow the following operations to be performed. Please note that administrators in Sugar can change the subpanel's Action menu to be displayed as separate buttons instead of a dropdown via Admin > System Settings. For more information, please refer to the System documentation in the Administration guide.

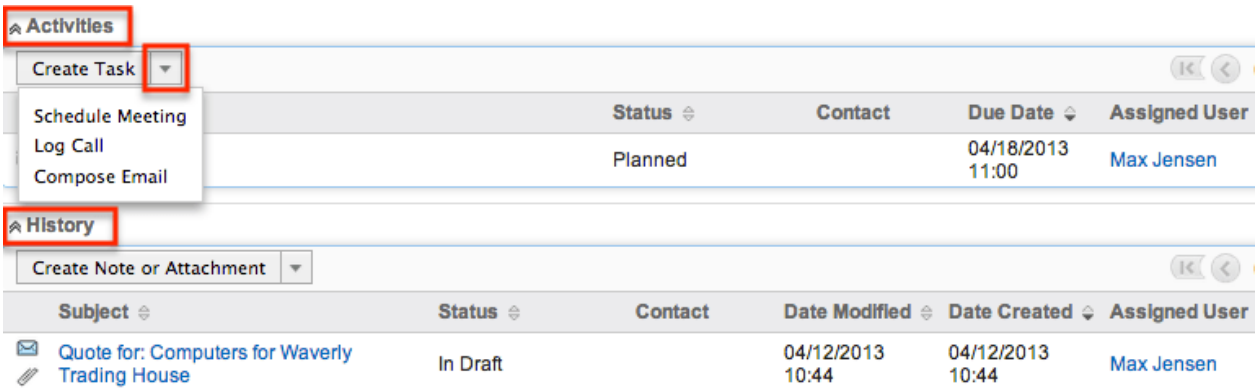
- To view the details of a related record, click the record's name in the subpanel to open it in record view (for Sidecar modules) or detail view (for Legacy modules).
- To relate an existing record to the quote, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the quote, choose "Create" from the subpanel's Action menu, then complete the Quick Create form and click "Save".
- To delete the quote's relationship to a record, choose "Unlink" from the dropdown on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

Please note that administrators can prevent users from moving subpanels to different locations in the detail view. For more information on preventing rearranging of subpanels, please refer to the System documentation in the Administration guide. Check with your system administrator if you are not able to rearrange your subpanels.



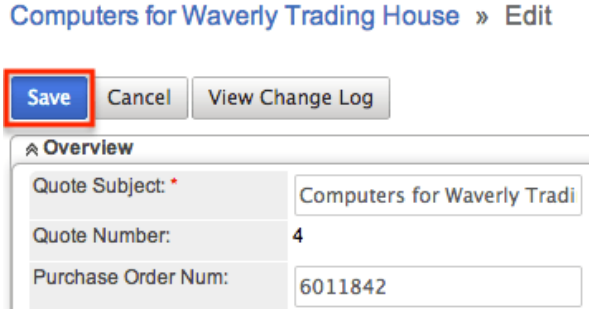

Activities and History Subpanel

The Activities subpanel lists open or upcoming tasks, calls, and meetings that are related to the quote record. Once the activities have taken place or are completed, they will instead appear within the History subpanel. The History subpanel also includes notes and emails associated with the quote record. For more information on the history and activities subpanel, please refer to the User Interface documentation.




## Editing Quotes

Quotes may be edited at any time to update or add information to the record. You can make changes to existing quote records via the Quotes edit view. The edit view is available within the Quotes module and includes all of the Quote fields you should need.

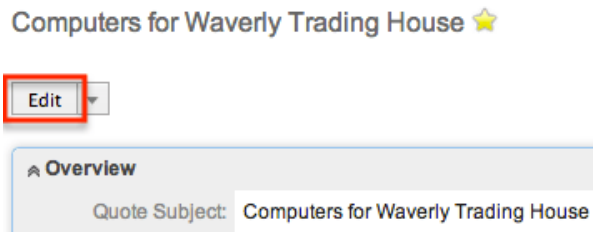



Please note that your ability to edit quotes in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure the Quotes edit view via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

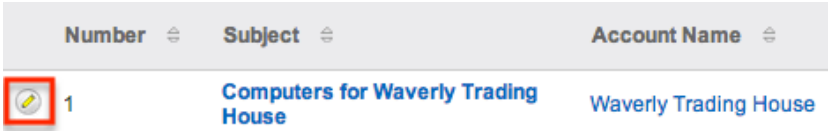
### Editing Via Detail View

You can edit quotes via the detail view by clicking the Edit button on the upper left of the page. Once the edit view layout is open, you can update the necessary fields, then click "Save" to preserve the changes made.




### Editing Via List View

You can edit quotes via the list view by clicking the Pencil icon to the left of each quote's name. The edit view layout will open and you can update the necessary fields, then click "Save" to preserve the changes.




## Deleting Quotes

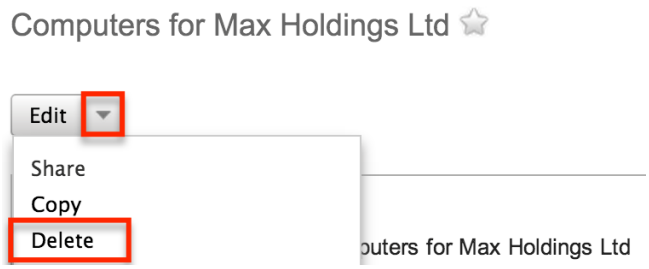
If a quote record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Quotes detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting quote records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

Please note that your ability to delete quotes in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

### Deleting Via Detail View

Use the following steps to delete a quote record via the detail view:

1. Navigate to a quote's detail view.
2. Select "Delete" from the Actions menu.

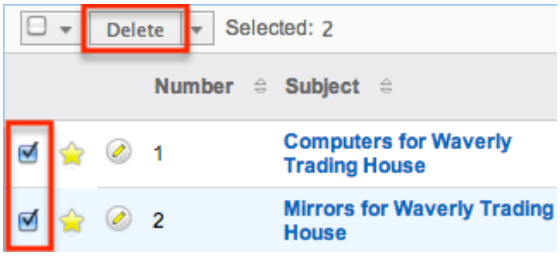



3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

### Deleting Via List View

Use the following steps to delete one or more quote records via the list view:

1. Navigate to the Quotes list view by clicking the Quotes module tab.
2. Use the Basic or Advanced Search to find the Quote records you wish to delete.
3. Select the desired quote records individually or using the checkbox dropdown's options.
4. Choose "Delete" from the Actions menu.



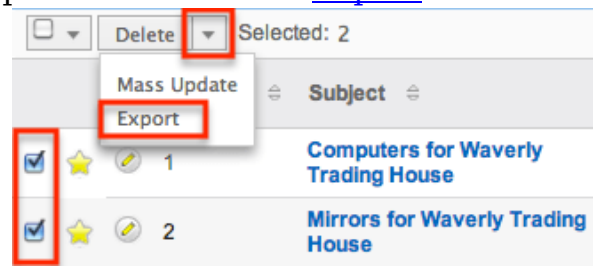

5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Due to PHP memory limitations on the server, there may be occasions when the application times out while deleting a large number of quote records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

## Exporting Quotes

Sugar's Export option allows users to download all fields for the selected quotes to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Quote data with other software such as Microsoft Excel. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of quote records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Quotes may be exported from the Quotes list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for quotes and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.




Please note that your ability to export quotes from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

## Mass Updating Quotes

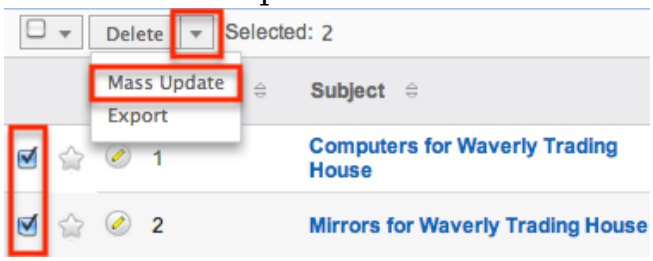
Mass Updating allows users to make the same change to multiple quote records at once from the Quotes list view. Users with administrator or developer level access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide. Due to the PHP memory limitations on the server, there may be occasions when the application times out while mass updating a large number of quote records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Please note that your ability to mass update quotes may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

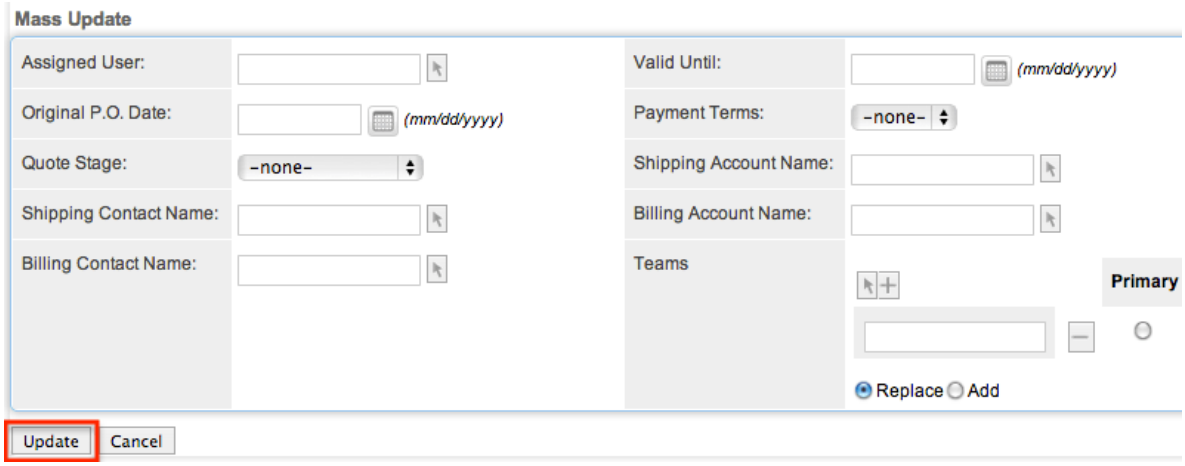
Use the following steps to mass update quote records from the list view:

1. Navigate to the Quotes list view by clicking the Quotes module tab.
2. Use the list view's Basic or Advanced Search to identify quotes you wish to modify.
3. Select the desired quotes individually or using the checkbox dropdown's options.

4. Choose "Mass Update" from the Actions menu.




5. Scroll to the Mass Update panel and set values for the fields you wish to alter. Note: For the Teams field, use "Replace" to remove existing team assignments before adding those specified here. Use "Add" to add the teams specified here to any existing team assignments.




6. Click "Update" to save the changes to all of the currently selected quote records.

## Favoriting Quotes

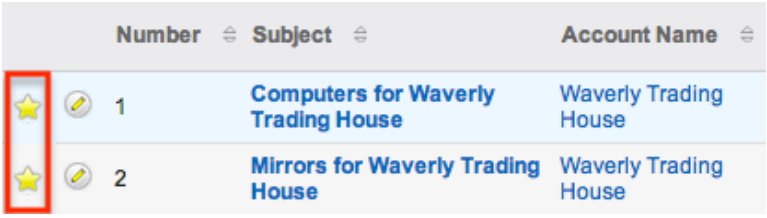
Each Sugar user has the option to designate their own favorite quotes which are important or will be viewed often so that they can easily be accessed via search or from the Quotes module tab. Once records are marked as favorites, use the My Favorites checkbox in the Quotes Basic or Advanced Search to retrieve your favorites or select from your most recent favorites directly from the Quotes module tab.

### Favoriting Via List View

Use the following steps to mark records as favorites via the Quotes list view:

1. Navigate to the Quotes list view by clicking the Quotes module tab.
2. Use the Basic or Advanced Search to find the Quote records you wish to mark as favorites.

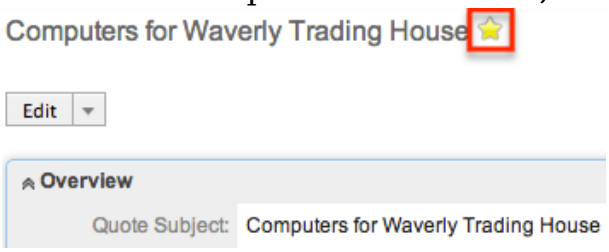
3. Mark the star icon on the left of each desired quote's row.
4. To remove the quote as a favorite, click the star again to revert it to white.




## Favoriting Via Detail View

Use the following steps to mark records as favorites via the Quotes detail view:

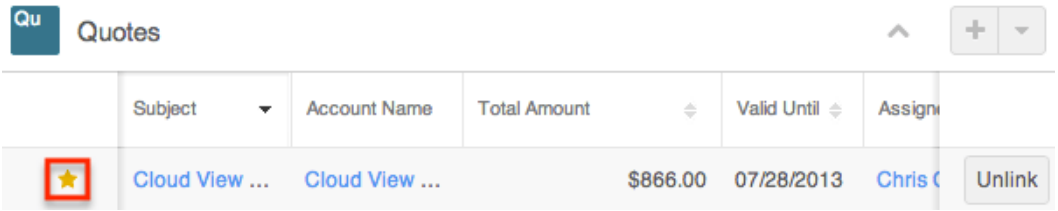
1. Navigate to a quote's detail view.
2. Click the star icon to the right of the quote's name in the upper left of the detail view to designate it as a favorite.
3. To remove the quote as a favorite, click the star again to revert it to white.




## Favoriting Via Subpanel

Use the following steps to mark quote records as favorites via the subpanel in related modules:

1. Navigate to a related module's record view (e.g. Contacts).
2. Click the star icon to the left of the desired record's row in the Quotes subpanel.




3. To remove the quote as a favorite, click the star again to revert it to gray.

# Sharing Quotes

Individual Quote records can be shared with other users in your organization by sending an email with the record's link directly from the detail view. In the quote's detail view, select "Share" from the Actions menu which will open a Compose Email window including the URL of the quote record. Enter the recipient(s) email address in the To field then click "Send".




Users can simply click the link in the email to access the quote record in Sugar. Please note that the user must be logged into Sugar in order to access the record. Users will only be able to view the shared record as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide

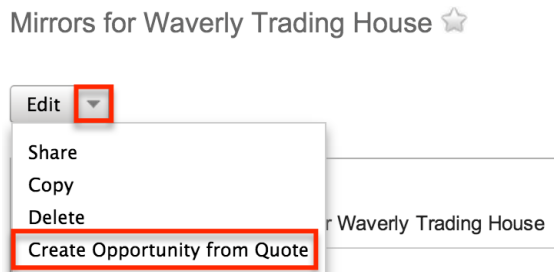
## Creating Opportunities from Quotes

Each opportunity record in Sugar represents a prospective sale and includes relevant sales data as well as relating to other important records such as quotes, contacts, etc. As you interact with your client and present the quote for your products and services, you can create an opportunity from the Quotes detail view to better track your sales. The displayed Opportunity record view is pre-populated with the original quote's values to reflect the opportunity name, account name, expected close date, best, likely, and worst amounts. Any other fields populated will be based off the default values as they are defined in Studio for the Opportunities module.

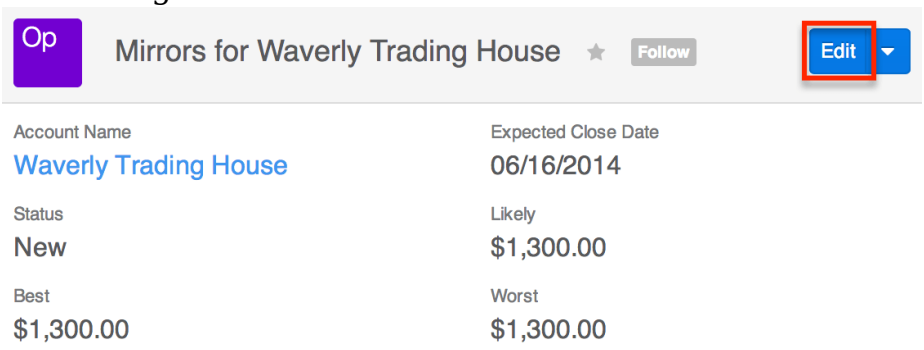
Please note that the opportunity record will automatically be associated to the quote. Also, each quoted line item of the quote will become a revenue line item associated to the newly created opportunity record.

Use the following steps to create an opportunity from a quote:

1. Navigate to a quote's detail view.
2. Select "Create Opportunity from Quote" from the Actions menu.




3. The newly created Opportunity record will be pre-populated with some of the original quote's values and linked to the quote record.
    - You may update the record if you wish by clicking "Edit" then saving the changes.



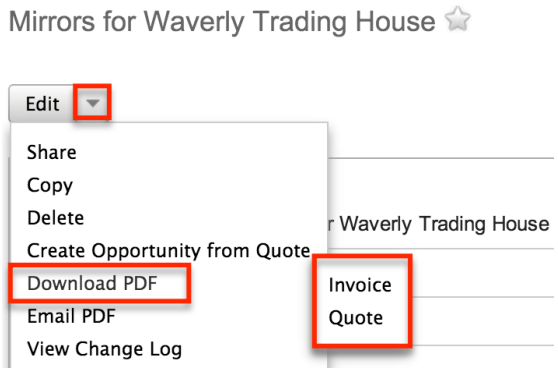

Note: Revenue line items are automatically generated for the opportunity based on the quoted line items in the original quote.

## Downloading Quotes as PDFs

Users have the option to download the quotes as PDF's via the Quotes detail view. The two formats available when downloading the quote to PDF is "Quote" and "Invoice". The Download PDF option enables you to easily download the quote onto your machine and email or mail it to your client outside of the Sugar application. Both PDF formats list the details (e.g. quantity, product name, etc.) of the items or services for purchase as well as the associated price (e.g. list price, unit price, tax, total, etc.). When the quote is initially created in the system, you can download it as a Quote PDF file and send it to the client for review. Once the client approves the quote's terms and agrees to purchase your product or service, you can generate an invoice for payment.

Use the following steps to download a quote as PDF:

1. Navigate to a quote record's detail view.
2. Hover on the Download PDF option in the Actions menu and choose either "Quote" or "Invoice".




3. Open the downloaded file and save it to your machine.
   Quote:

SUGARCRM

10050 N Wolfe Rd.
SW2-130
Cupertino, CA 95014

| Quote | |
|---|---|
| Quote number: | 4 |
| Sales Person: | Max Jensen |
| Valid until: | 06/16/2014 |

| Bill To | Ship To |
|---|---|
| | Jamie Johnson |
| Waverly Trading House | Waverly Trading House |
| 48920 San Carlos Ave | 48920 San Carlos Ave |
| New York, NY, 35772 | New York, NY, 35772 |
| USA | USA |

**Chairs**

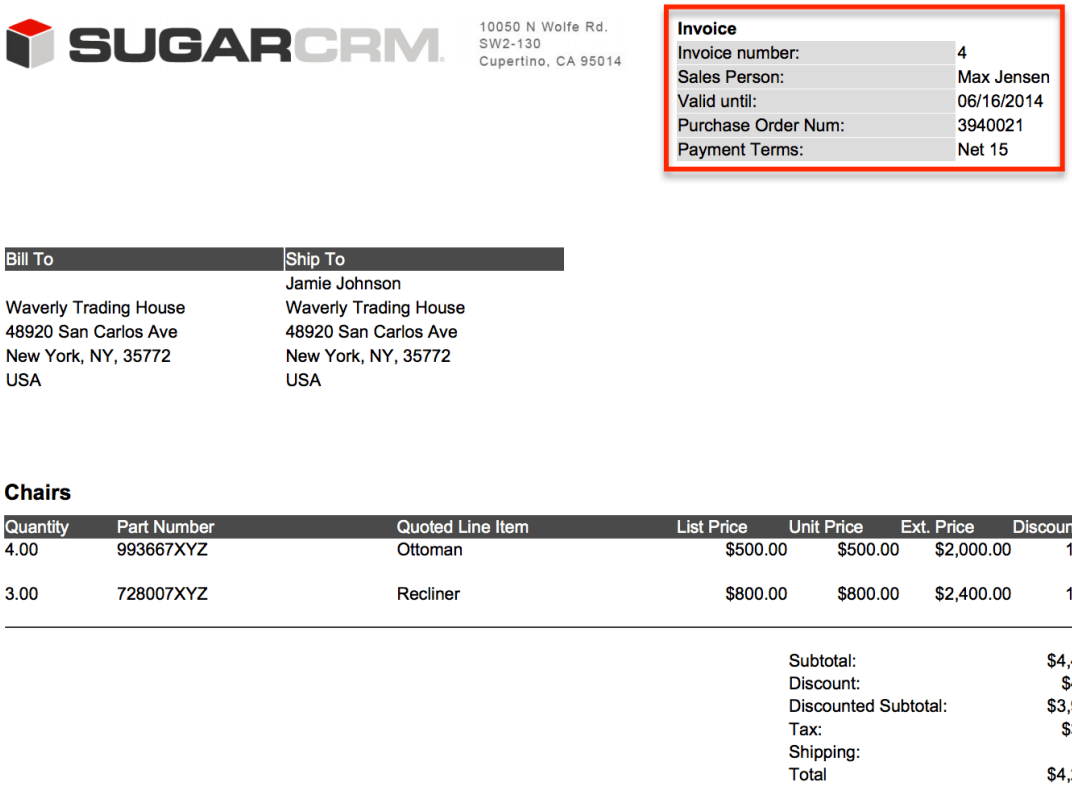
| Quantity | Part Number | Quoted Line Item | List Price | Unit Price | Ext. Price | Discount: |
|---|---|---|---|---|---|---|
| 3.00 | 728007XYZ | Recliner | $800.00 | $800.00 | $2,400.00 | 10.00% |
| 4.00 | 993667XYZ | Ottoman | $500.00 | $500.00 | $2,000.00 | 10.00% |

| | |
|---|---|
| Subtotal: | $4,400.00 |
| Discount: | $440.00 |
| Discounted Subtotal: | $3,960.00 |
| Tax: | $326.70 |
| Shipping: | $0.00 |
| Total | $4,286.70 |

**Grand Total**

| | | | |
|---|---|---|---|
| Currency: | USD | Subtotal: | $4,400.00 |
| | | Discount: | $440.00 |
| | | Discounted Subtotal: | $3,960.00 |
| Tax Rate: | 8.25% | Tax: | $326.70 |
| Shipping Provider: | | Shipping: | $0.00 |
| | | Total | $4,286.70 |

   Invoice:



SUGARCRM

10050 N Wolfe Rd.
SW2-130
Cupertino, CA 95014

**Invoice**

| | |
|---|---|
| Invoice number: | 4 |
| Sales Person: | Max Jensen |
| Valid until: | 06/16/2014 |
| Purchase Order Num: | 3940021 |
| Payment Terms: | Net 15 |

| Bill To | Ship To |
|---|---|
| | Jamie Johnson |
| Waverly Trading House | Waverly Trading House |
| 48920 San Carlos Ave | 48920 San Carlos Ave |
| New York, NY, 35772 | New York, NY, 35772 |
| USA | USA |

**Chairs**

| Quantity | Part Number | Quoted Line Item | List Price | Unit Price | Ext. Price | Discount: |
|---|---|---|---|---|---|---|
| 4.00 | 993667XYZ | Ottoman | $500.00 | $500.00 | $2,000.00 | 10.00% |
| 3.00 | 728007XYZ | Recliner | $800.00 | $800.00 | $2,400.00 | 10.00% |

| | |
|---|---|
| Subtotal: | $4,400.00 |
| Discount: | $440.00 |
| Discounted Subtotal: | $3,960.00 |
| Tax: | $326.70 |
| Shipping: | $0.00 |
| Total | $4,286.70 |

# Emailing Quotes as PDFs

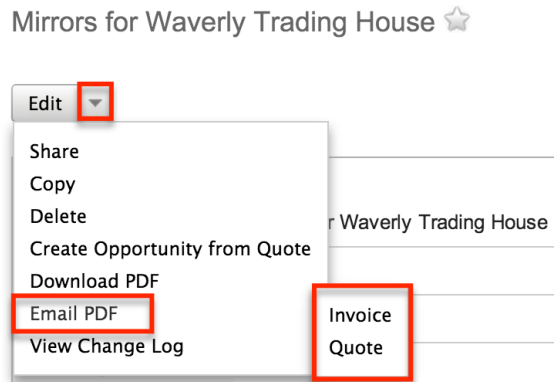
Users also have the option to email quotes to clients in PDF format (i.e. Quote or Invoice) using Sugar's email client. The Email PDF option generates and attaches the PDF document of the quote to be emailed to the client. Both the Quote and Invoice formats list the details (e.g. quantity, product name, etc.) of the items or services for purchase as well as the associated price (e.g. list price, unit price, tax, total, etc.). Normally, the quote will be sent to the client to approve the quote's terms then the invoice is sent once they agree to purchase your product or service.

Please note that administrators in Sugar must first configure the outbound mail server for the system via Admin > Email Settings in order for users to send outbound emails. For more information on setting up the system email settings, please refer to the Emails documentation in the Administration guide. Users will also need to have their email settings configured in their user preferences prior to sending outbound email from the Emails module. For more information on setting up your user preferences' email settings, please refer to the Getting Started documentation.

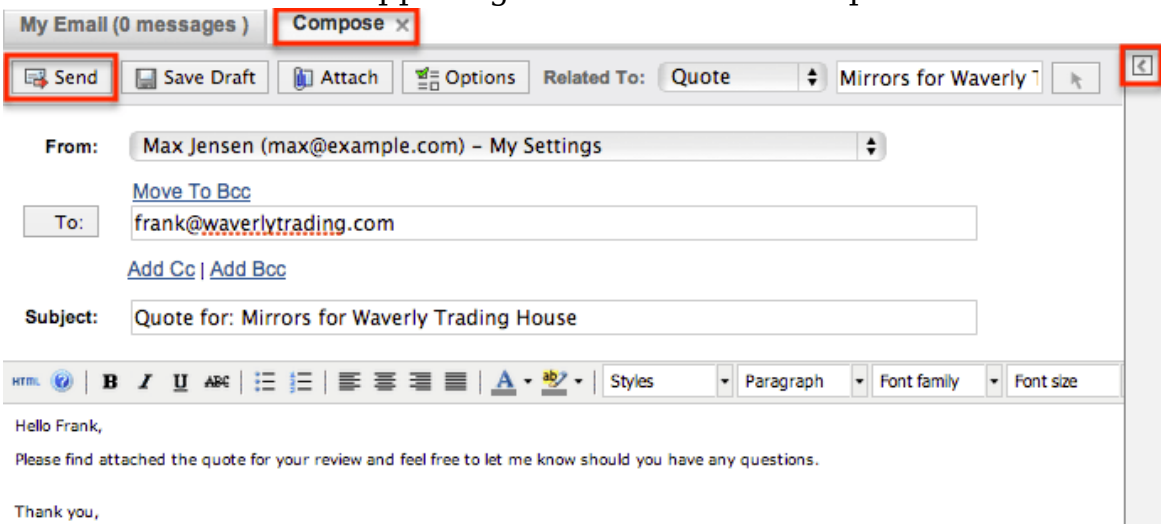
Use the following steps to email a quote as PDF:

1. Navigate to a quote record's detail view.

2. Hover on the Email PDF option in the Actions menu and choose either "Quote" or "Invoice".

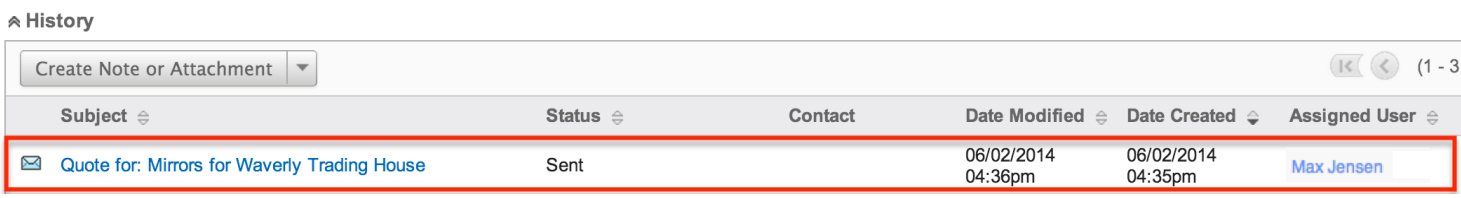



3. The compose email option will open in the Emails module.
    - The email's To field will automatically populate with the email address of the selected account or contact (if related).
    - You can update the Subject field if you wish and enter a body for the email message.
    - Please note that the Quote or Invoice PDF document will automatically be attached to the email. To view the attached PDF document, click the left arrow on the upper right corner of the Compose window.



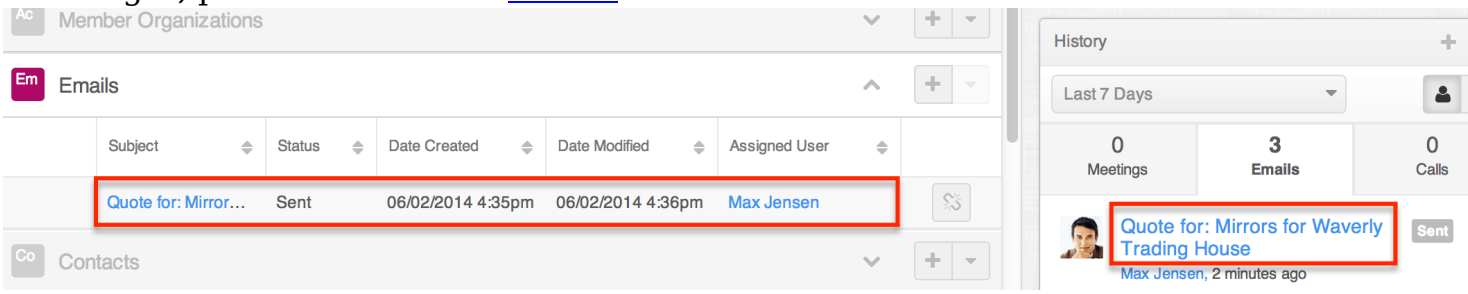

4. Click "Send" to send the quote or invoice to the client.

Once the email is sent successfully, the email record will appear in the History subpanel of the quote's detail view.



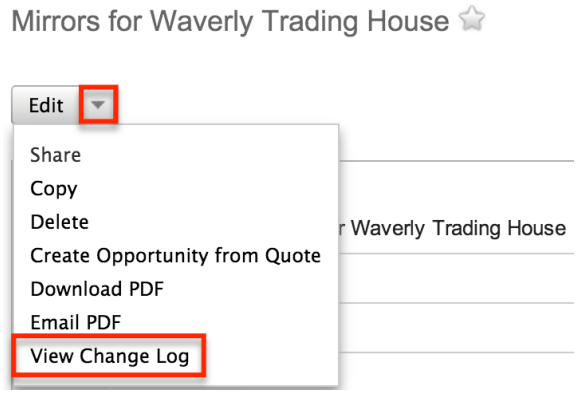

The email record will also appear in the History dashlet and Emails subpanel for the account or contact (if related) record. For more information on sending emails

from Sugar, please refer to the Emails documentation.




## Viewing Quote Change Logs

Changes made to each quote record are tracked over time, and users are able to view the history of changes via the change log in each quote's detail view. To view the change log, navigate to a quote's detail view and select "View Change Log" from the Actions menu. Please note that only fields marked as "Audit" in Admin > Studio will be displayed in the change log. For more information on designating for audit, please refer to the Studio documentation in the Administration guide.




## Updating Currency Rates

When saving a quote in a currency that differs from the system-defined default currency, Sugar will store the conversion rate for that currency at the record level. This conversion rate is used to calculate the Converted Amount when the field is set to use the system default currency (as opposed to the user's preferred currency which is explained below). To keep amounts historically accurate, the conversion rate will only update on a quote provided the quote stage is not set to "Closed Accepted", "Closed Lost", or "Closed Dead". If the quote is in any other stage, the conversion rate will update under the following scenarios:

- The quote undergoes a save event (e.g. mass update, manual save, etc.) and the record's currency has a different conversion rate defined in Admin > Currencies than is currently saved in the quote.

- An administrator updates the currency exchange rate under Admin > Currencies. This will trigger a scheduled job which updates all quotes saved with that currency to the new rate.

When the viewing user's profile has the Show Preferred Currency option selected, the Converted Amount field displays the Transactional Amount in the user's preferred currency. In this case, the conversion rate used to calculate the Converted Amount's value is drawn directly from the conversion rate at the system level rather than any conversion rate stored on the record. This means that the value will always use the current conversion rate regardless of the opportunity's sales stage. For this reason, the Converted Amount field should not be considered historically accurate for closed quotes when it is using the user's preferred currency. For information about setting a user's Preferred Currency and Show Preferred Currency options, please refer to the Getting Started documentation.

For more information about currency exchange rates, please refer to the System documentation in the Administration guide.

Last Modified: 09/22/2016 05:48pm

# Quoted Line Items

## Overview

Sugar's Quoted Line Items module consists of all products that have already been sold or are in the process of being sold to clients. The list of products sold by your organization is housed in Admin > Product Catalog and administrators have the ability to add products as necessary. When creating quoted line items, you have the option to either select products from the catalog or create new products via the Quoted Line Items module. There are various ways you can create quoted line items in Sugar such as via the Quoted Line Items module, Quotes module, duplication, importing quoted line items, etc. Once the quoted line item record is created, you can view and edit information pertaining to the quoted line item via the Quoted Line Items record view. This documentation will cover how to use the Quoted Line Items module as well as the various actions and options available from within the module.

## Quoted Line Item Fields

The Quoted Line Items module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's

needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

| Field | Description |
|---|---|
| Account Name | The account to which the quoted line item belongs |
| Asset Number | The product's internal inventory number |
| Book Value | The book value of the product upon order |
| Book Value Date | The date on which the product was ordered |
| Calculated Quoted Line Item Amount | The quoted line item amount auto-populated based on the unit price, quantity, and discount amount.<br><br>Note: The field cannot be modified manually. |
| Category | The category to which the quoted line item's product belongs<br><br>Note: For more information on creating product categories, please refer to the documentation in the Administration guide. |
| Contact Name | The contact to which the quoted line item belongs |
| Cost | The actual cost of the quoted line item's product displayed either a) the system default currency when the user's Show Preferred Currency option is disabled or b) the user's preferred currency when their Show Preferred Currency option is enabled<br><br>When the opportunity's currency differs from the displayed currency as described above, a dark grey box will also appear with the Best amount in the transactional currency. For more information, please refer to the System documentation in the Administration Guide. |

| | |
|---|---|
| | Note: The value is automatically populated based on the selected product and may not be modified manually. |
| Currency | The currency type (e.g. US Dollars) in which the account will pay for the quoted line item |
| Date Created | The date the quoted line item record was created |
| Date Modified | The date the quoted line item record was last modified |
| Description | A description or other information about the quoted line item |
| Discount Amount | The quoted line item's discount amount displayed either a) the system default currency when the user's Show Preferred Currency option is disabled or b) the user's preferred currency when their Show Preferred Currency option is enabled<br><br>When the opportunity's currency differs from the displayed currency as described above, a dark grey box will also appear with the Discount Amount in the transactional currency. For more information, please refer to the System documentation in the Administration Guide. |
| Discount in % | Indication that the offered discount rate is a percentage value |
| Discount Total | The total amount of discount offered on the quoted line item |
| Expected Close Date | The date when the quoted line item is expected to close or already has closed |
| List Price | The quoted list price of the product displayed either a) the system default currency when the user's Show Preferred Currency option is disabled or b) the user's preferred currency when their Show Preferred Currency option is enabled |

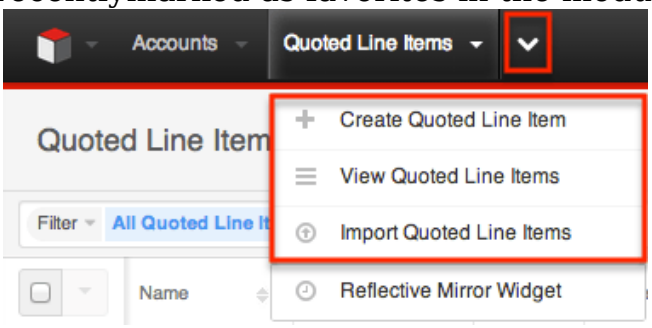
| | |
|---|---|
| | When the opportunity's currency differs from the displayed currency as described above, a dark grey box will also appear with the Best amount in the transactional currency. For more information, please refer to the System documentation in the Administration Guide.<br><br>Note: The value is automatically populated based on the selected product and may not be modified manually. |
| Manufacturer | The manufacturer for the product<br><br>Note: For more information on creating and managing manufacturers, please refer to the Products and Quotes documentation in the Administration guide. |
| Mft Part Number | The manufacturer's part number for the quoted line item's product |
| Modified by Name | The Sugar user who last modified the quoted line item record |
| Name | The product's name as selected from the product catalog list or manually entered as new<br><br>Note: For more information on creating and managing the product catalog, please refer to the Products and Quotes |
| Pricing Factor | The variable pricing factor depending on the pricing formula |
| Pricing Formula | The pricing formula for the quoted line item |
| Product URL | The web address of product if available online |
| Purchased | The actual purchase date of the product |
| Quantity | The number of products being purchased |
| Quote Name | The quote to which the quoted line item belongs<br>Note: Quoted line items only appear on |

| | |
|---|---|
| | a quote record when it is created directly from the Quotes module. For more information, please refer to the Creating Via Quotes Module section of this documentation. |
| Serial Number | The serial number for the product |
| Status | The current status of the quoted line item |
| Support Contact | The name of user responsible for providing product support |
| Support Desc | Brief description or other information regarding the support provided |
| Support Expires | The date when product support ends |
| Support Starts | The date when product support starts |
| Support Term | The term (e.g. six months, one year, etc.) in which support will be provided for the product |
| Support Title | The title of the support representative providing product support |
| Tax Class | Tax classification (e.g. taxable, non-taxable) for the quoted line item |
| Teams | The Sugar team(s) assigned to the quoted line item record |
| Type | The specified product type<br><br>Note: For more information on creating product types, please refer to the Products and Quotes documentation in the Administration guide. |
| Unit Price | The unit price of the product displayed either a) the system default currency when the user's Show Preferred Currency option is disabled or b) the user's preferred currency when their Show Preferred Currency option is enabled<br><br>When the opportunity's currency differs from the displayed currency as described above, a dark grey box will also appear with the Unit Price amount |

| | |
|---|---|
| | in the transactional currency. For more information, please refer to the System documentation in the Administration Guide. |
| Vendor Part Number | The vendor's part number for the product |
| Weight | The weight of the product |

## Quoted Line Items Module Tab

The Quoted Line Items module tab is typically found by clicking the arrow to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Quoted Line Items" to access the list view. Once the Quoted Line Items tab displays on the navigation bar, you can click the triangle within the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of quoted line items you last viewed in the module. The Favorites Menu displays the list of quoted line items you most recentlymarked as favorites in the module.




The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|---|---|
| Create Quoted Line Items | Opens the record view layout to create a new quoted line item |
| View Quoted Line Items | Opens the list view layout to search and display quoted line items |
| Import Quoted Line Items | Opens the import wizard to create or update quoted line items using external data |

If you do not see the Quoted Line Items module tab in Sugar, please check the following:

- The Quoted Line Items module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Quoted Line Items module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Quoted Line Items module for your entire Sugar instance. Reach out to your Sugar administrator to have the Quoted Line Items module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

## Creating Quoted Line Items

There are various methods for creating quoted line items in Sugar including via the Quoted Line Items module, Quotes module, quick create, duplication, and import. The full record view layout opens when creating the record directly from the Quoted Line Items menu and includes all of the relevant fields for your organization's quoted line items. Please note that administrators have the ability to create and manage items from the product catalog, product category, product type, and manufacturer list via Admin > Products and Quotes. For more information on how to create and manage these quoted line item fields, please refer to the Products and Quotes documentation in the Administration guide. The Record View layout can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

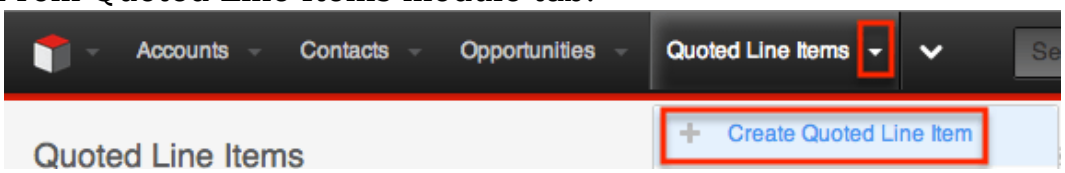
Note: Quoted line items only appear on a quote record when it is created directly from the Quotes module. For more information, please refer to the Creating Via Quotes Module section of this documentation.

### Creating Via Quoted Line Items Module

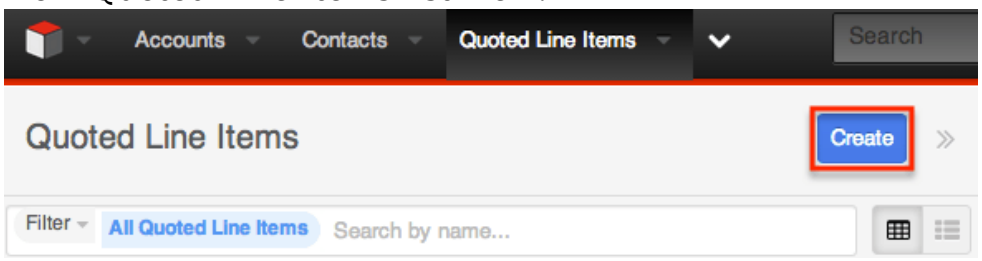
One of the most common methods of quoted line item creation is via the Create Quoted Line Item option in the module tab or the Create button on the list view. This opens the record view layout which allows you to enter all of the relevant information for the quoted line item.
Use the following steps to create a quoted line item via the Quoted Line Items module:

1. Click the triangle in the Quoted Line Items module tab to open the actions

menu and select "Create Quoted Line Item". You can also click the Create button on the upper right of the Quoted Line Items list view.
From Quoted Line Items module tab:

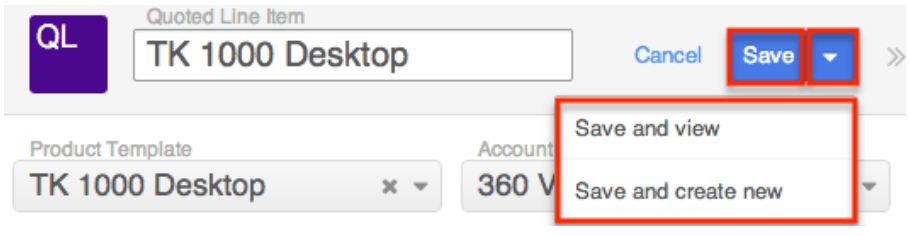



From Quoted Line Items list view:




2. Enter appropriate values for the fields in the record view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.
    - You can either select an existing product from the product catalog or enter a new product in the Quoted Line Item field. If you choose to select a product from the product catalog, several fields will populate automatically to match the chosen product.
    - Please note that new products you create via the Quoted Line Items module will not be added to the product catalog.
3. Once the necessary information is entered, click "Save".

    - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.




## Creating Via Quotes Module

The Quotes record view layout allows you to select products from the product catalog to add as line items when creating the quote. You can also manually enter new products that are not available in the product catalog to your quote. The

quoted line item added to each quote line item creates a new record in the Quoted Line Items module when the quote is saved. For more information on adding quoted line items to quote line items, please refer to the Creating Quotes section of the Quotes documentation.

**Line Items**

Group Name: **Mirrors** Group Stage: **Draft**

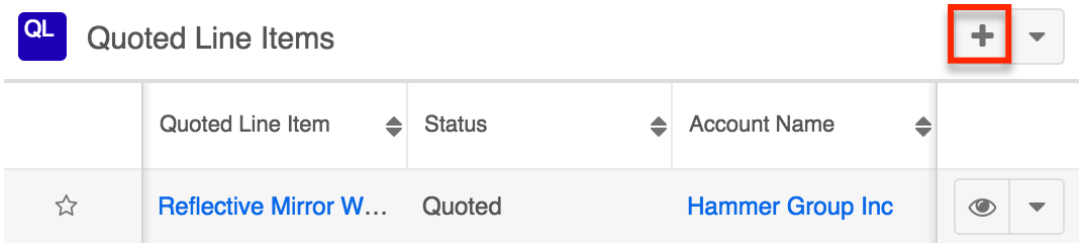
| | Quantity | Quoted Line Item | Cost | List | Unit Price |
|---|---|---|---|---|---|
| 1 | 25 | Reflective Mirror Widget | $200.00 | $325.00 | $260.00 |

## Creating Via Quick Create

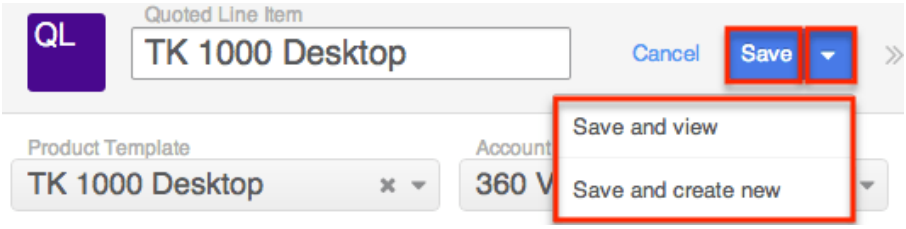
You can also quick create a quoted line item from any Quoted Line Items subpanel on related module records. Simply click the Plus button on the upper right of the Quoted Line Items subpanel to create a new record.

Please note that administrators have the ability to disable subpanels for the entire instance via Admin > Display Modules and Subpanels. Reach out to your Sugar administrator if the Quoted Line Items subpanel is not displayed in related module records. For more information, please refer to the Developer Tools documentation in the Administration guide.
Use the following steps to create a quoted line item via quick create:

1. Navigate to a related module's record view (e.g. Accounts).
2. Click the Plus button on the upper right of the Quote Line Items subpanel.




3. Enter appropriate values in the fields in the record view form. All required fields will indicate "Required" in the field and must be completed prior to saving.
4. Once the necessary information is entered, click "Save".
    - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.

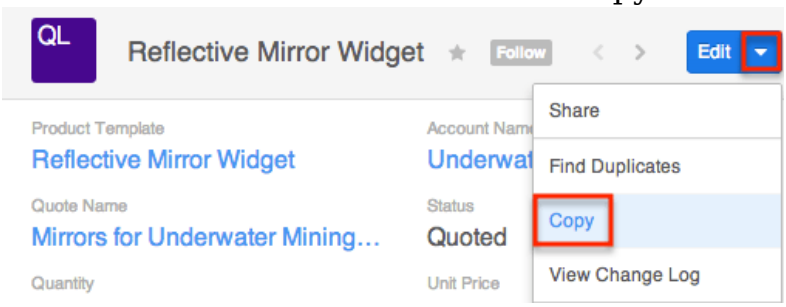



## Creating Via Duplication

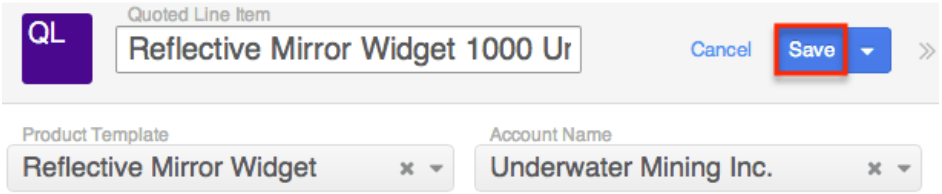
You can also create a new quoted line item by duplicating an existing quoted line item record. The Copy option is useful if the quoted line item you are creating has similar information to an existing quoted line item record.

Use the following steps to create a quoted line item by duplicating an existing record:

1. Navigate to a quoted line item's record view.
2. Click the Actions menu and select "Copy".




3. The displayed record view is pre-populated with the original quoted line item's values. Update the necessary fields, then click "Save".
    - Please note that you can also click the Actions Menu to the right of the Save button to select the "Save and view" or "Save and create new" options. Save and view will display the record's details after the save is complete. The Save and create new option saves the current record and opens a new, blank record view in edit mode where the user can create another record.

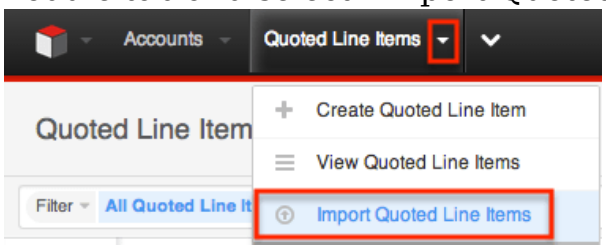



## Importing Quoted Line Items

The import function allows you to push multiple quoted line item records into

Sugar using a comma (or other character) delimited file instead of creating them one-by-one. For more information on importing, please refer to theImport documentation.

Use the following steps to import quoted line items via the Import Quoted Lined Items option:

1. Click the triangle to access the Actions menu in the Quoted Line Items module tab and select "Import Quoted Line Items".


2. In Step 1, select the import file and choose "Create new records only". Click "Next".
3. In Step 2, confirm the import file properties. Click "Next".
4. In Step 3, confirm the field mappings for the import. Click "Next".
5. In Step 5, view the import results.
    - The Created Records tab will show all of the new quoted line item records.
    - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
    - The Errors tab will show records that were not imported due to errors detected during import.

## Viewing Quoted Line Items

There are various options available for viewing quoted line item records in Sugar including via Quoted Line Items list view, Quoted Line Items record view, Quoted Line Items Recently Viewed menu, dashlets, activity streams, and reports. Please note that you will only be able to see quoted line item records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

### Viewing Via List View

The Quoted Line Items list view displays all quoted line item records meeting the current search criteria. Users can also access the activity stream to view posts specific to the quoted line item record. For more information on the record view's

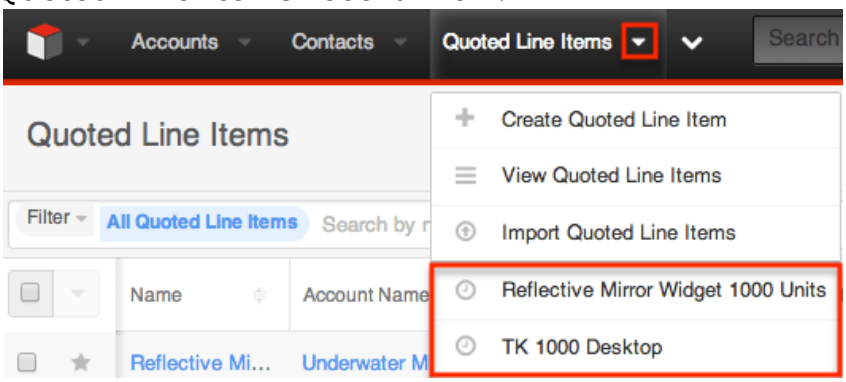
Activity Stream, please refer to the Activity Stream section of this documentation. The Intelligence pane can also be viewed to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record. For more information regarding the record view's Intelligence Pane, please refer to the Intelligence Pane section of this documentation. To access the list view, simply click theQuoted Line Items module tab. While list view shows key product fields, you can click the quoted line item's name to open the record view. For more information on viewing quoted line items via list view, please refer to the Quoted Line Items List View sectionof this documentation.

## Viewing Via Record View

The Quoted Line Items record view displays thorough quoted line item information including all relevant fields followed by subpanels of the quoted line item's related records belonging to various modules. Users can also access the activity stream to view posts specific to the quoted line item record. For more information on the Record View's Activity Stream, please refer to the Activity Stream section of this documentation. The Intelligence pane can also be viewed to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's sales, cases, activities, etc. For more information regarding the Record View's Intelligence Pane, please refer to the Intelligence Pane section of this documentation. The record view can be reached by clicking a quoted line item record's link from anywhere in the application including from the Quoted Line Items list view. For more information on viewing quoted line items via the record view, please refer to theQuoted Line Items Record View section of this documentation.

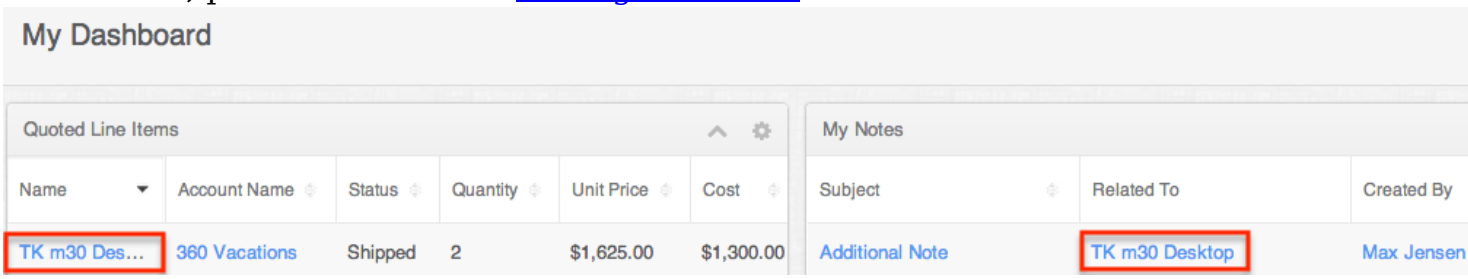
## Viewing Via Recently Viewed

As you work, Sugar will keep track of which quoted line items you have recently viewed. Click the Actions menu in the Quoted Line Items module tab to see a list of your most recently viewed quoted line items, and click each name to open the Quoted Line Items record view.



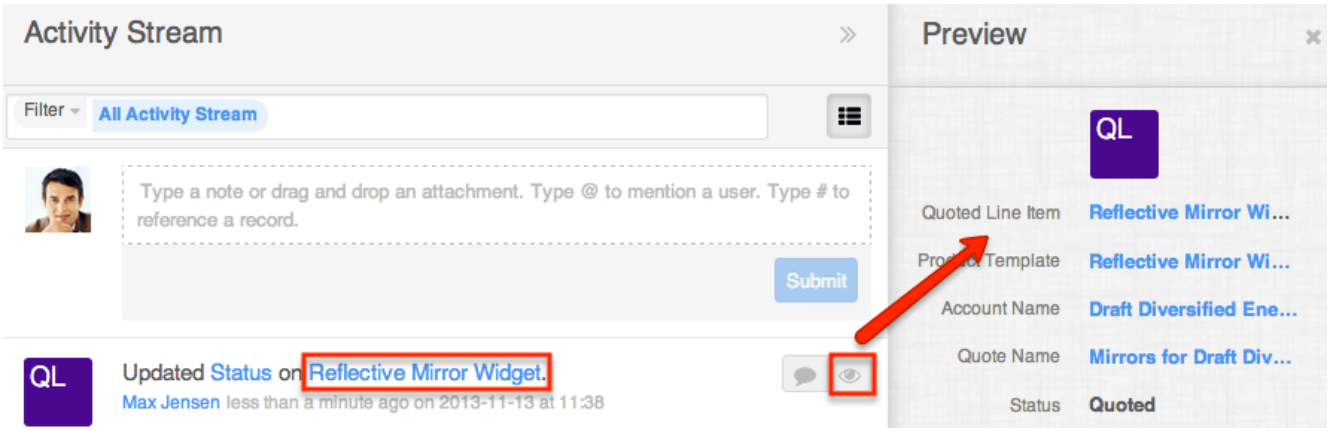
## Viewing Via Dashlets

Sugar Dashlets allow users to get a quick view of various records, activities, reports, etc. Dashlets may be added to a user's Home page or to the intelligence pane of any module. You can view quoted line item information in List View dashlets specific to the Quoted Line Items module (e.g. Quoted Line Items dashlet), as well as List View dashlets based on other modules such as "My Notes". Clicking aquoted line item's name from any dashlet will open the Quoted Line Items record view. For more information on using dashlets and viewing quoted line item records via dashlets, please refer to the Intelligence Pane documentation.




## Viewing Via Activity Streams

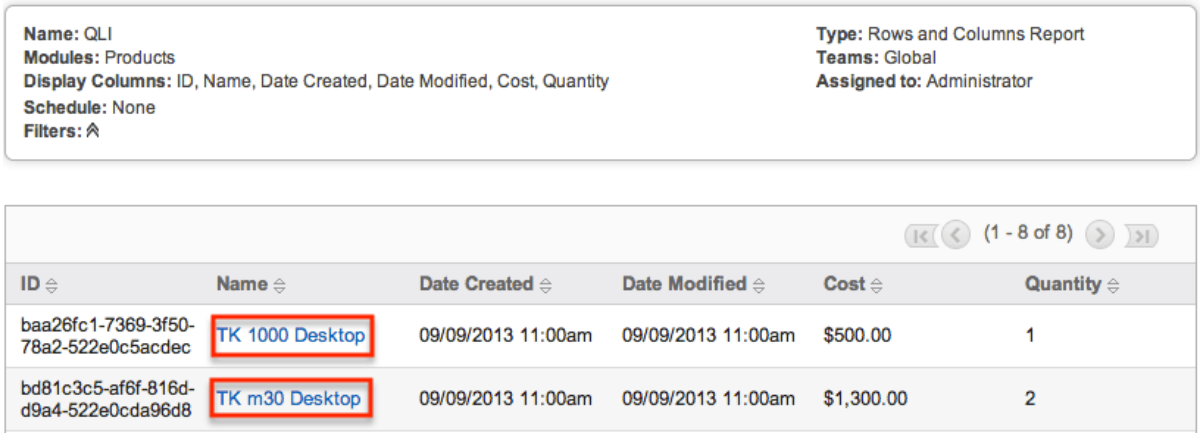
The activity stream allows users to view each other's activities in Sugar and the actions that took place for the various modules (e.g. Quoted Line Items, etc.) via posts (record post, user post, etc). You can access the Quoted Line Items record view by clicking the quoted line item's name referenced in the post. You can also preview the quoted line item record's detail directly from the activity stream by clicking the Preview button to the right of the post. For more information on viewing records via the activity stream, please refer to the Activity Streams Documentation.




## Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to

gather key data regarding quoted line items and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the Quoted Line Items record view by clicking the quoted line item's name in the report results. Please note that you can only directly access record views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the documentation.




Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

## Searching Quoted Line Items

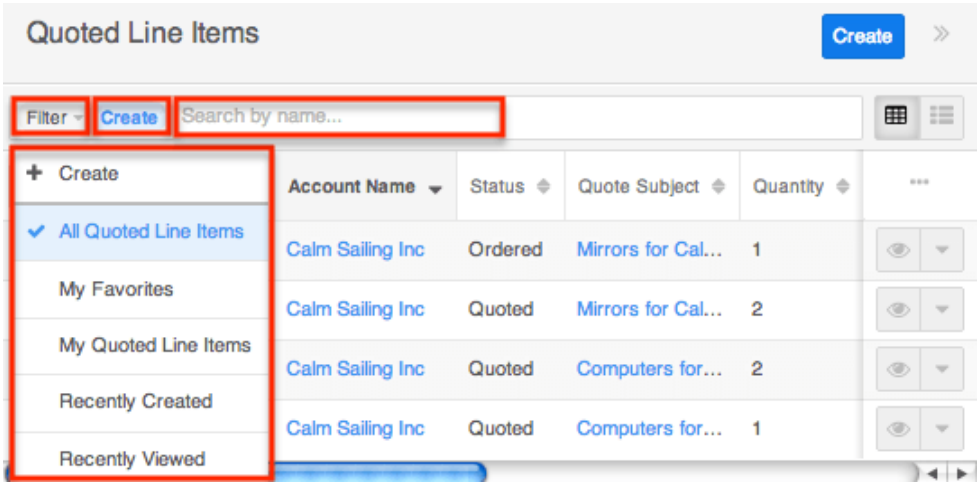
The Quoted Line Items list view includes a module search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Quoted Line Items list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

## Module Search

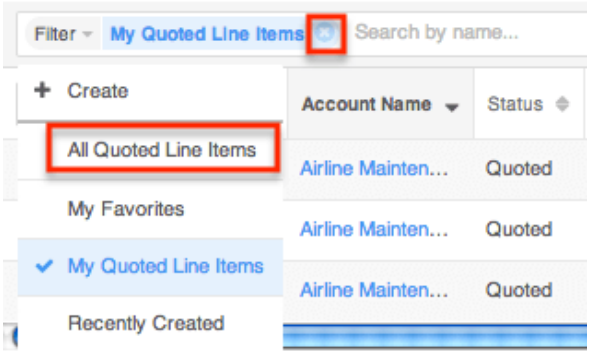
Module search enables users to easily search by the quoted line item name within the Quoted Line Items module and pull up matching records in the list view.The search also provides a Filter option which can be used in combination with the open Search box to narrow your search further using the available options as follows:

- Create : Create a new custom filter which you can use to filter your search
  - Note: You can also click "Create" to the right of the Filter option.
- All Quoted Line Items : Returns all records in the module to which you have access
- My Favorites : Returns only records you have marked as favorites
- My Quoted Line Items: Returns only records assigned to you
- Recently Created : Returns only records you created in the module within the last 7 days
- Recently Viewed : Returns only records you have viewed in the module within the last 7 days




When you choose a filter, Sugar will return records which match both the selected filter and any name provided in the "Search by name..." bar in the filtered list view results. For example, if you select "My Quoted Line Items" in the Filter options and enter a quoted line item name, Sugar will only records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search bar. To see all quoted line item records to which you have access, simply select the All Quoted Line Items option in the filter and remove any text from the search bar. You can also click the Clear icon within the selected filter option (e.g. My Quoted Line Items) in the Search bar to clear the filter and pull up all list view search results. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved

when navigating away.




Please note that you will only be able to see quoted line item records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Administrators can configure what fields appear on the Quoted Line Items Module Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

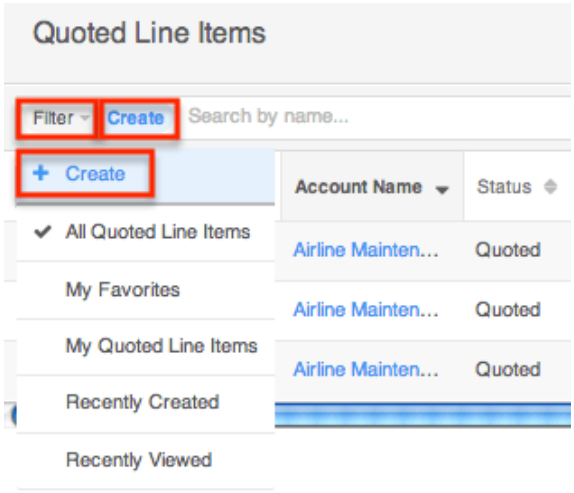
Creating a Filter

Users can also create new filters via the Create option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the Quoted Line Items list view.You have the option to add multiple fields to your new filter by clicking the Plus button to the right of the filter selection dropdown lists and set select operators along with their value(s).A filter's criteria need to be true for a record in order for it to appear in the list view search result. Additionally, filters with no specified values may be saved as a custom filter to act as a filtertemplate when a user often searches using the same fields but with varying values. Please note that only fields you have view access for will appear in the Filter list when creating a search filter.

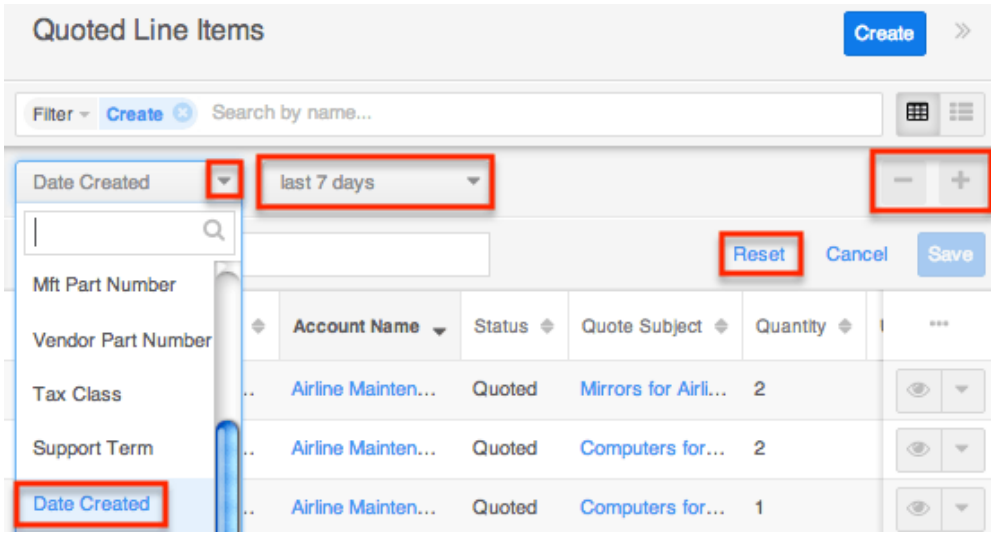
When you run a search using a created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter.Please note that searches using the open Search box only are not preserved when navigating away.

The following steps cover creating a new Date Created filter as an example:

1. Click the Filter option on the Quoted Line Items search bar then select "Create".
    - You can also click "Create" to the right of the Filter option.




2. Select the field you wish to add to your filter as well as the condition and matching criteria.
    - Note: Only fields you have view access for will be available to add in the Filter list.
3. To add additional fields to the new filter, click the Plus button to the right of the filter dropdown list.
    - To remove fields from the new filter, click the Minus button to the right of the filter.
    - To clear any filter values (e.g. last 7 days), simply click the "x" to the right of the value (if applicable) or select "Reset" to the left of the Save button.




The list view will automatically display results matching your filters as you create and modify the criteria.

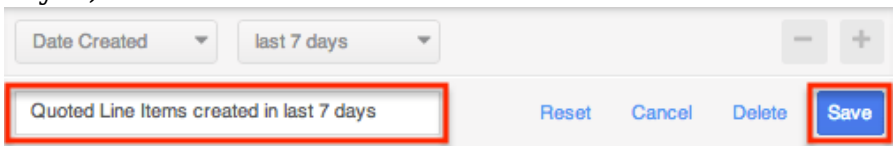
## Saving a Filter

Saving a filter will preserve the chosen fields as well as the condition(s) of the matching value(s). Additionally, it will allow users to easily select previously

created and saved filters from the Filter options.

The following steps cover saving a new search by Name filter as an example:

1. Create a new filter to perform a search on your desired fields.
2. Enter in a name for the new filter (e.g. "Quoted Line Items created in last 7 Days").




3. Click "Save" to add this filter to the module's Filter options.

## Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search is used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.




To use global search, you need to first enter the keyword into the search box and pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the Search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

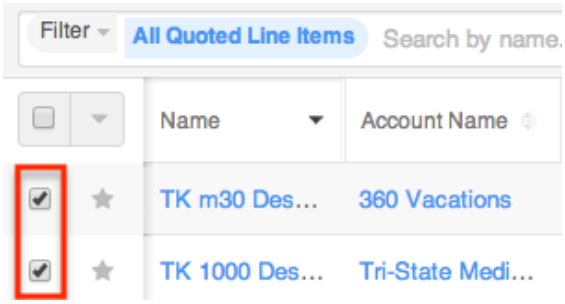
# Quoted Line Items List View

The Quoted Line Items list view displays all quoted line item records meeting the current search criteria to which your user has access. You can view the basic details of each quoted line item within the field columns. Please note that you will only be able to see quoted line item records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

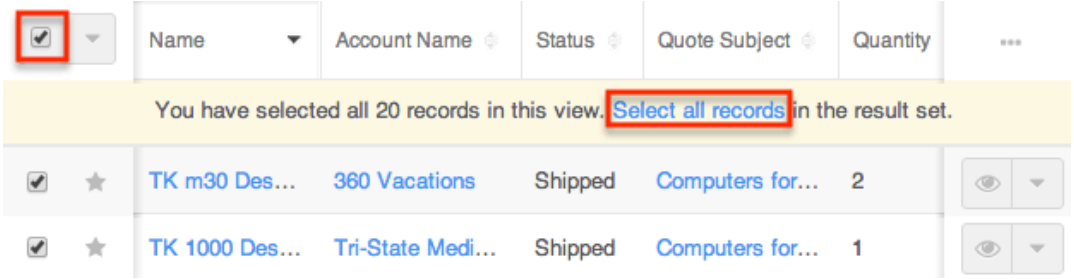
Users with administrator or developer access have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Checkbox Selection

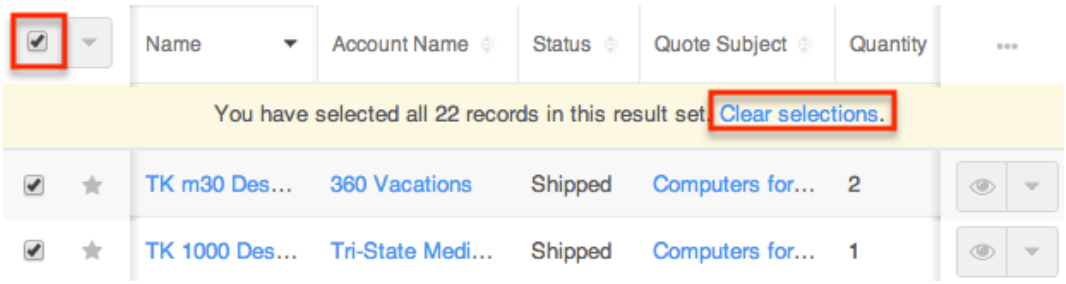
You can perform several actions on quoted line item records directly from the list view by first selecting the desired records. To select individual quoted line item records on the Quoted Line Items list view, mark the checkbox on the left of each row.




To select all quoted line item records displayed on the current set of list view results, click the checkbox to the left of the Actions menu. A dialog will appear below the list view column headers indicating that you have selected all records on the list view's current results set (e.g. 20). To select all records matching the current search results set, click "Select all records" in the dialog.

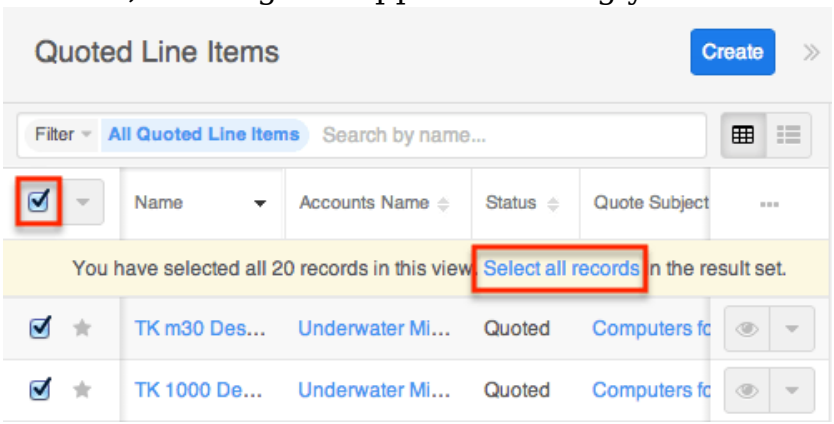



If you wish to clear the selection for all records on the list view result set, simply click "Clear selections" in the dialog. You can also clear the selections for all records by clicking the checkbox option again to remove the check marks.

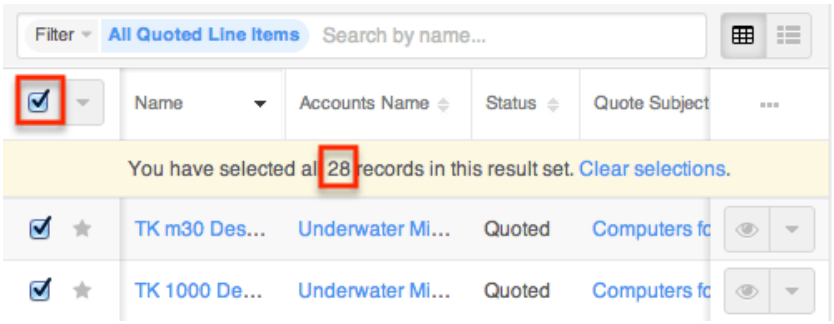



## Total Record Count

You can view the total record count on the Quoted Line Items list view by selecting all records displayed on the current set of list view results. Once the records are selected, a dialog will appear allowing you to select all records in the results set.

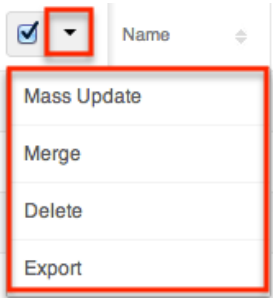



The total count of all records on the list view result set will appear in the dialog.




## Mass Actions Menu

The Actions menu to the right of the checkbox option allows you to perform various actions on the currently selected records.

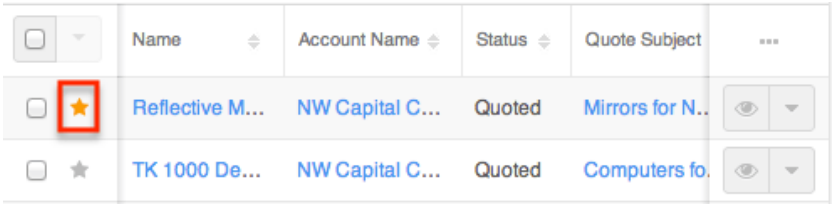



The options in the Mass Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Mass Update | Mass update one or more quoted line items at a time |
| Merge | Merge two or more duplicate quoted line items |
| Delete | Delete one or more quoted line items at a time |
| Export | Export one or more quoted line items to a CSV file |
| Recalculate Values | (Available in certain circumstances) Updates calculated values to reflect changes to calculated fields made in Studio |

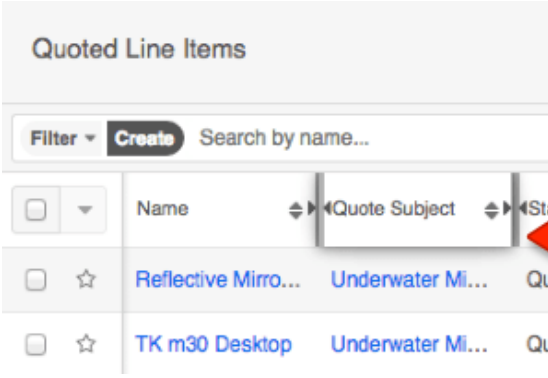
## Favorite Designation

Users have the option to mark quoted line item records as favorites via the list view as well as the record view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the Quoted Line Items module tab. In the Quoted Line Items list view, the star on the left of each record's row is orange once marked to indicate a favorite quoted line item. For more information on how to mark records as favorites, please refer to the Favoriting Quoted Line Items section of this documentation.



## ColumnReordering

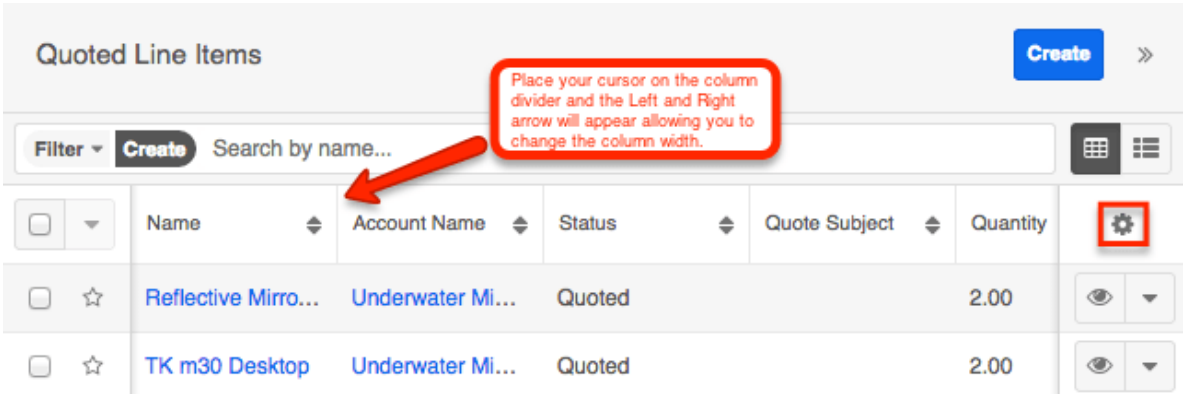
List view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared.You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the default column order.




## Column Resizing

Users can easily adjust the size of columns in the Quoted Line Itemslist view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the current list view is different from the default column width. Changes to the column width made by administrators in Studio are only respected if the user has not resized the specific column in the list view. The column size set by the user will supersede the default column width configured in Studio until the user resets the list view back to the default widths. For more information on how admins can set column widths, please refer to the Studio documentation in the Administration guide.

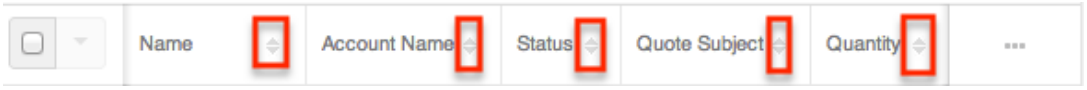
Note: Sugar enforces a minimum width for currency fields (e.g. Best, Likely, etc.) in list view columns which prevents the columns from being collapsed beyond this limit.




## Column Sorting

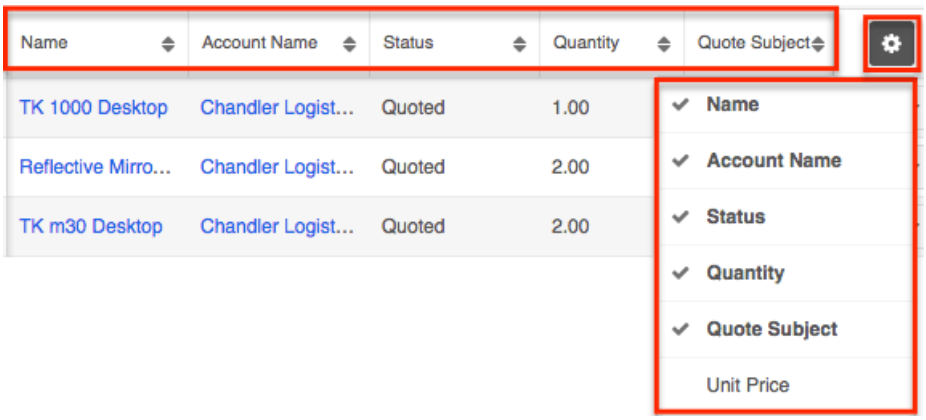
List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows.

Note: List views may only be sorted by one column at a time and cannot be sorted by custom relate fields.



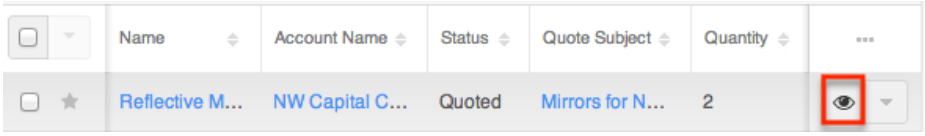

## Column Selection

Sugar gives users the ability to personalize the list view by specifying which fields they want to be displayed in the list view. You can click the Column Selection icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column on your list view. Please note that administrators have the ability to configure what fields are available to display in the list view via Admin > Studio. For more information on configuring fields to display in the list view, please refer to the Studio documentation in the Administration Guide.

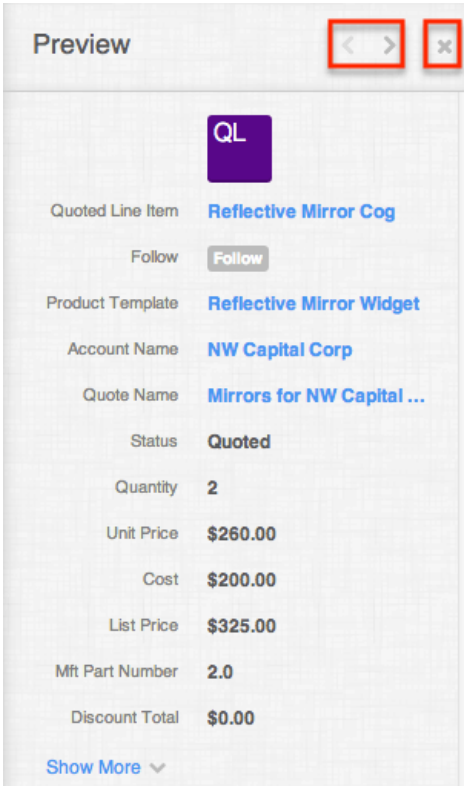


## Preview

Users can view a record's details directly from the Quoted Line Items list view by clicking the Preview icon to the far right of each quoted line item's row.

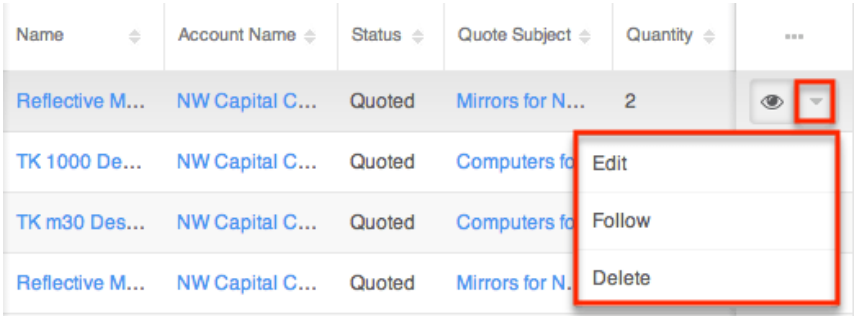



The record's data will display to the right of the list view providing key information regarding the record as well as the related activity stream information. On the upper right of the intelligence pane, there is a Left and Right arrow button that allows you to scroll through the list view's current search results by previewing the next or previous record. To close the preview, simply click the "X" on the upper right of the intelligence pane.




## Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to edit, follow, or delete specific records directly from the list view.

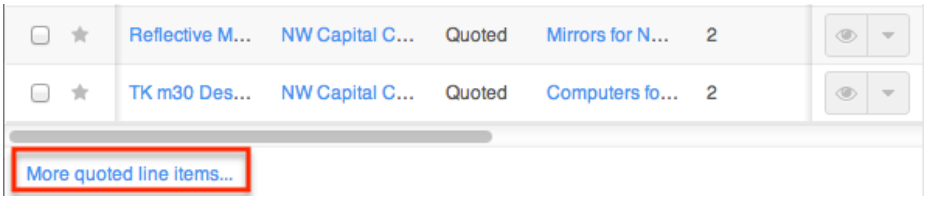



The options in the Record Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this quoted line item |
| Follow | Follow this quoted line item |
| Delete | Delete this quoted line item |

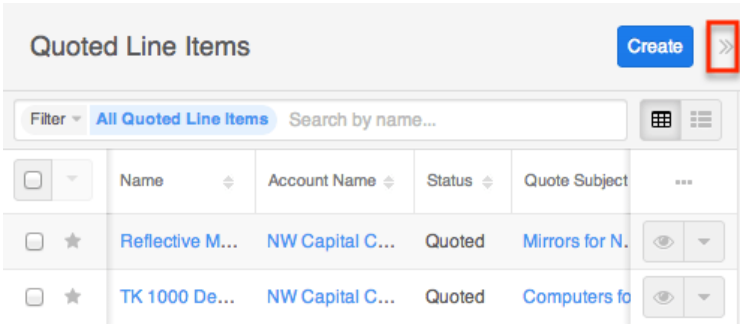
## More Quoted Line Items

The list view loads an initial number of records meeting the current search criteria with the option to show additional results at the user's request. By default, Sugar displays 20 records per list view results set, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide. To load the next set of list view results, simply click the More Quoted Line Items link at the bottom of the list view.



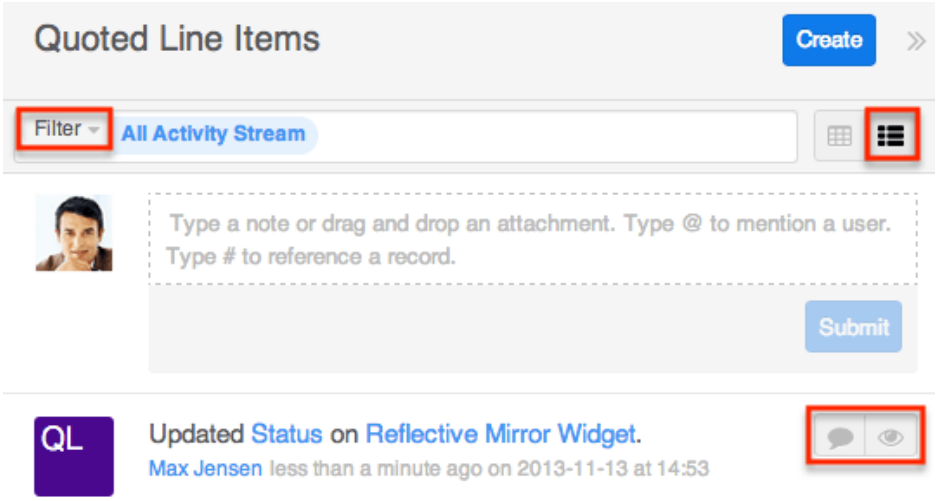

## Right Hand Side Drawer

On the upper right of the Quotes Line Items list view there is a double arrow icon which allows users to expand the list view to the full screen width. The intelligence pane to the right of the list view will be hidden when the list view is expanded. To reduce the list view's width and reveal the intelligence pane, simply click the double arrow icon again.




## Activity Stream

The Quoted Line Items module's activity stream displays user posts made on the Quoted Line Items module and record posts relevant to an individual quoted line item record. To view the module's activity stream, simply click the Activity Stream button to the right of the list view's search bar. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts using the comment button to the far right of each post. You can also preview the record referenced in record posts by clicking the Preview button to the right of each post. The activity stream can be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box and selecting the desired message type.

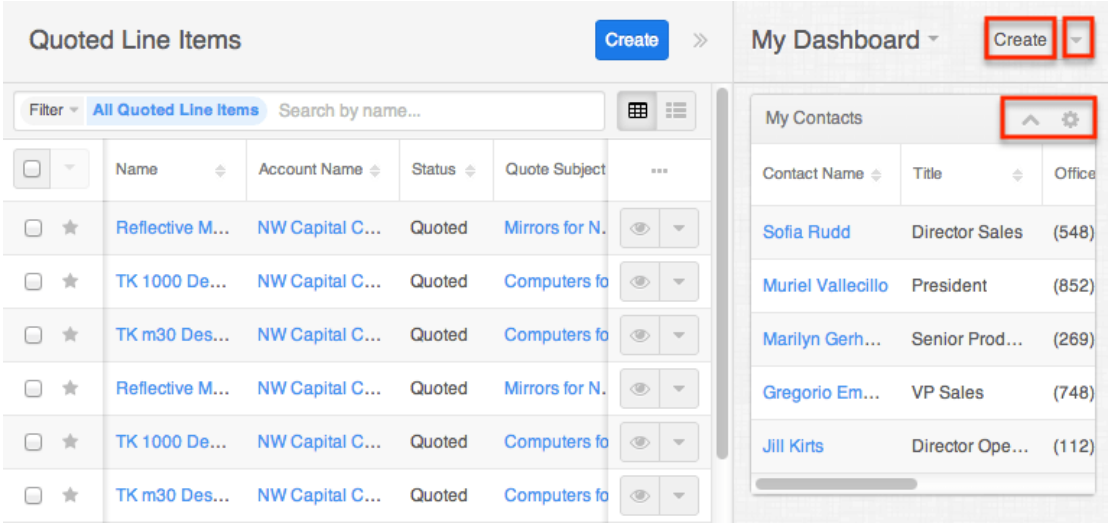


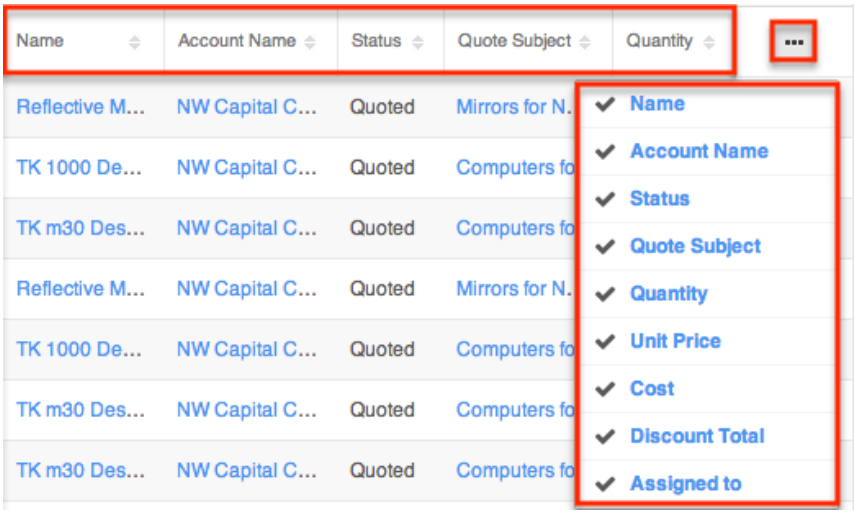

## Intelligence Pane

An intelligence pane displays to the right of the Quoted Line Items list view and provides users with valuable record information via various dashlets.The Help dashboard normally displays by default along with the List View Help dashlet and Learning Resources dashlet. The List View Help dashletprovides users with a brief introduction to the module along with a link (e.g. Quoted Line Itemsdocumentation) to the corresponding documentation in the Application guide.

The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab.For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard".Users may create other dashboards for use with the Quoted Line Items module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets (e.g. My Contacts, etc.) to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do not wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Quoted Line Items module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.



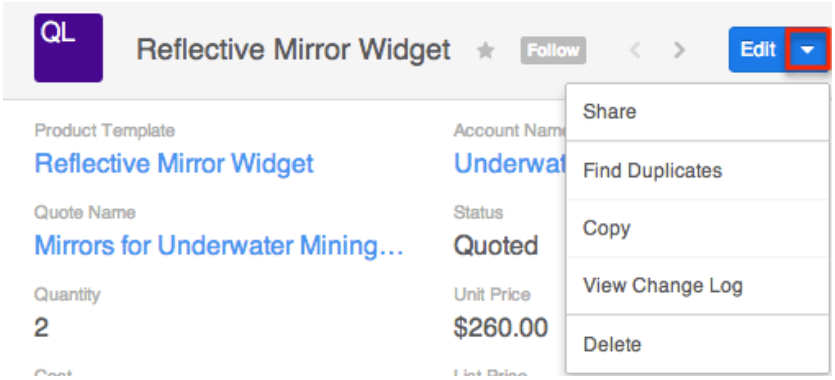
# Quoted Line Items Record View

The Quoted Line Items record view displays thorough quoted line item information including all relevant fields. Beneath the fields you can toggle between viewing a quoted line item's subpanels of related records (e.g. Documents) and the record's activity stream. The record view can be reached by clicking a quoted line item record's link from anywhere in the application including from the Quoted Line Items list view.

Please note that you will only be able to view a quoted line item record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Users with administrator or developer access have the ability to change the record view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Actions Menu

The Actions menu on the top right of each quoted line item's record view allows you to perform various actions on the current record.



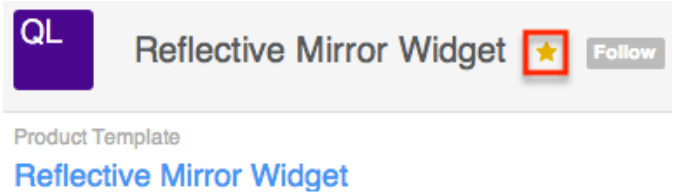

The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this quoted line item |
| Share | Share a link to this quoted line item via email |
| Download PDF | Download quoted line item information as a PDF file |
| Email PDF | Email quoted line item information as a PDF attachment |

| | |
|---|---|
| Find Duplicates | Locate potential duplicates of this quoted line item |
| Copy | Duplicate this quoted line item |
| View Change Log | View a record of changes to this quoted line item |
| Delete | Delete this quoted line item |

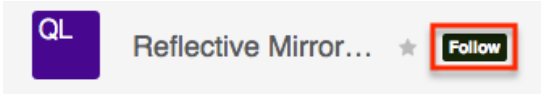
## Favorite Designation

Users have the option to mark quoted line item records as favorites via the record view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the Quoted Line Items module tab. In the Quoted Line Items record view, the star on the right of the record's name is orange once favorited. For more information on how to mark records as favorites, please refer to the Favoriting Quoted Line Items section of this documentation.



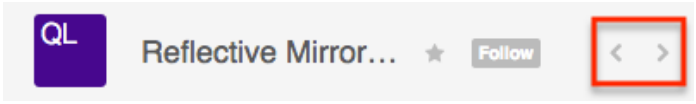

## Following Designation

Users also have the option to follow quoted line item records via the record view or list view. This allows users to view record posts from followed quoted line items on their Home page and Quoted Line Items list view activity streams. Each user can personalize their activity stream by viewing posts for records that are most important to them. From the record view, users may follow or unfollow quoted line items to which they have access using the Follow button to the right of the record's name. For more information on how to mark records to follow via the list view, please refer to the Record Actions Menu section of this documentation.Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. If you wish to stop following a specific quoted line item record, click the Following button to revert it to gray. Should a user lose access to a record in Sugar, they will automatically stop following that record.



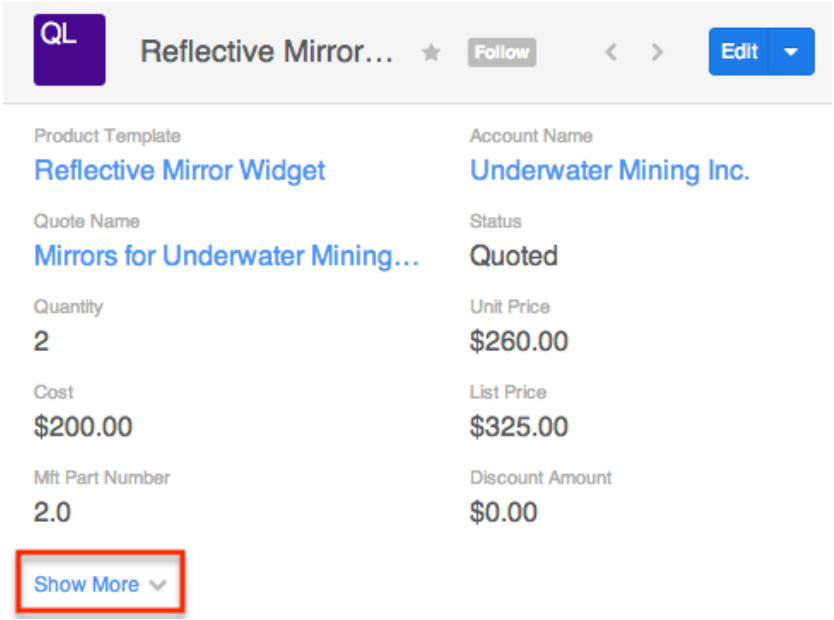
## Next or Previous Record

On the upper right of the Quoted Line Items record view, there are two buttons that allow you to page through each record in the Quoted Line Items list view's current search results. Clicking the Left arrow button displays the previous quoted line item of the current search results while clicking the Right arrow button displays the next record of the current search results.



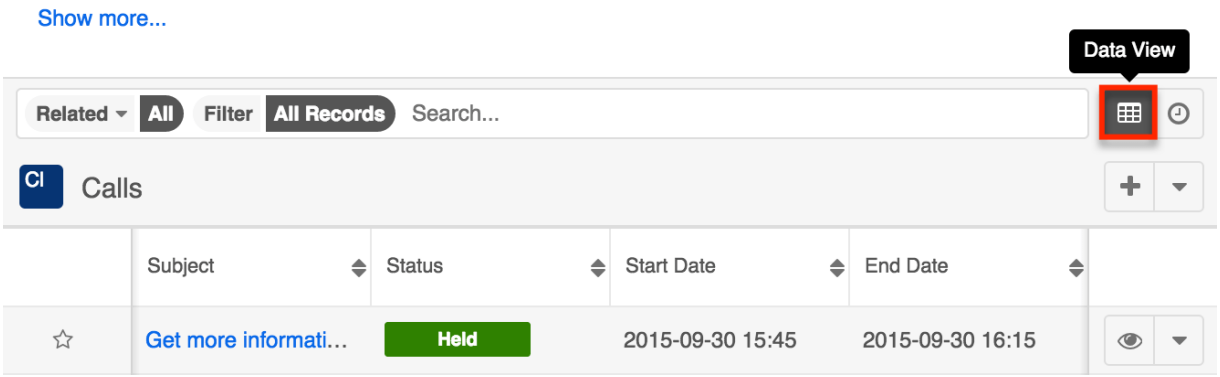

## Show More

The Quoted Line Items record view typically display a few key fields (e.g. status, quantity, quote name, etc.) on the business card panel with the option to view more fields by clicking the Show More link on the bottom left. Please note that administrators can configure what fields appear on the business card panel via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.



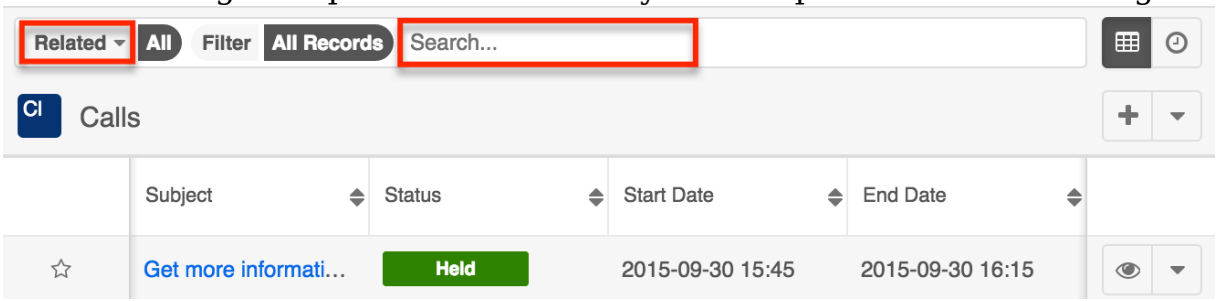

## Subpanels

Beneath a quoted line item record's fields are subpanels containing related records from various modules. Selecting the Data View button will display the subpanels rather than the record's activity stream.

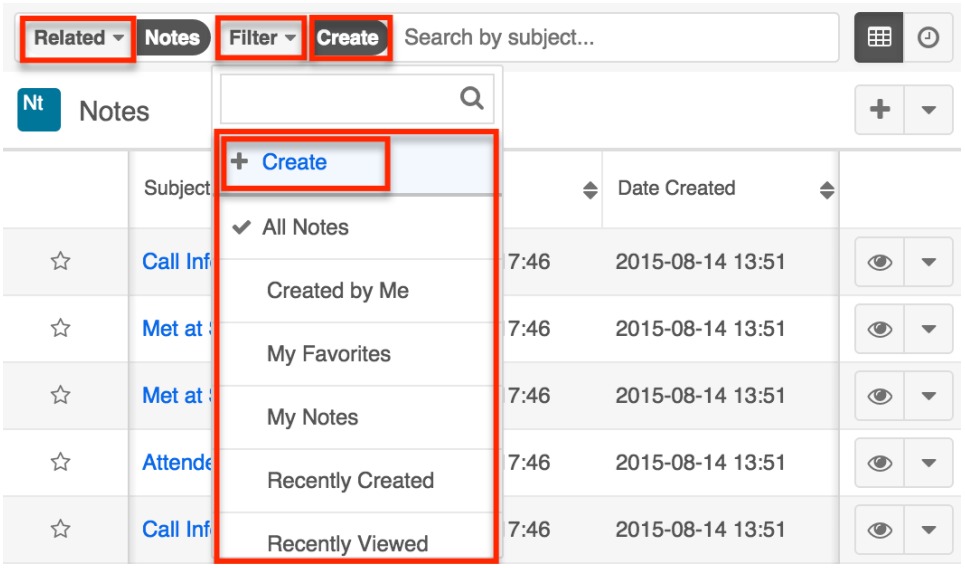



Filter Options

While in Data View, all of the quoted line item record's related records will be displayed beneath the record's fields. Users have the ability to search for records which appear in the subpanels as well as filter the view to only display a specific module (e.g. Documents). To locate a record by name, enter the keyword into the Search bar, and the subpanel(s) with the matching record(s) will appear below. To filter, simply click the Related option to the far left of the Search bar and select the module whose subpanel you wish to view. Filter and search may be combined to only display matching records within a selected module. To see all subpanels to which you have access, simply select "All" in the Related options and remove any text from the search bar.When you run a search using a saved or created filter, the search will be preserved when you navigate away from the page.Returning to the page will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.

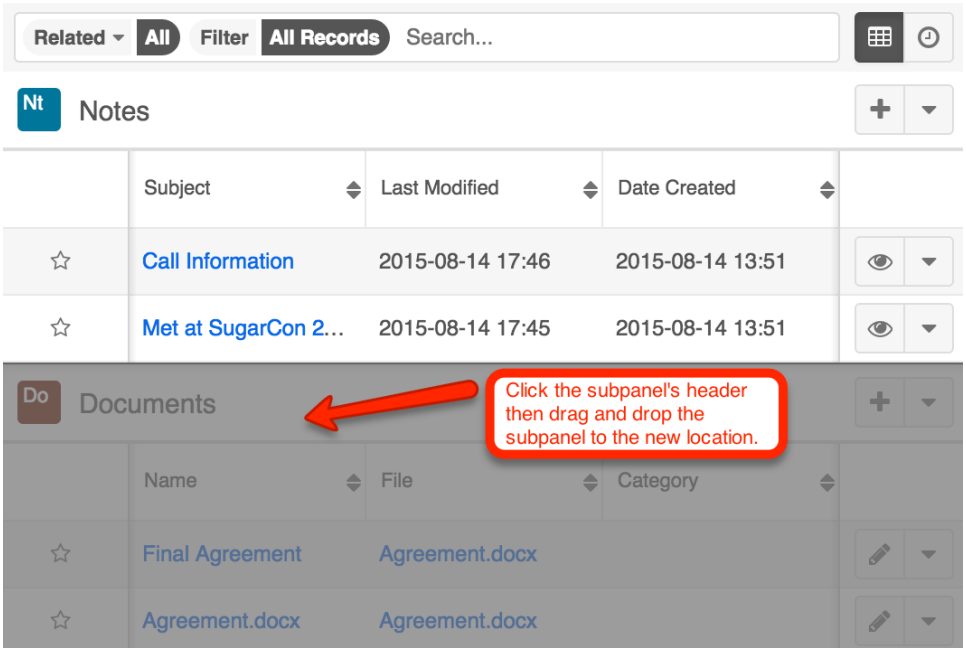



When a Sidecar module (e.g. Notes) is selected from the Related options, you have the option to filter the related subpanels further using one of the available options (e.g. My Favorites, Recently Created, etc.). Please note that you can also create custom filters for related Sidecar modules. Once the related module (e.g. Notes) is selected, either click the Filter option and select "Create" or click "Create" to the right of the Filter option. For more information on creating related records filter, please refer to the Creating a Related Records Filter section of the Search documentation.




## Reordering Subpanels

Users can easily move subpanels to a new location on the record view by dragging and dropping the subpanel's header. The new subpanel order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared.




## Related Record Subpanels

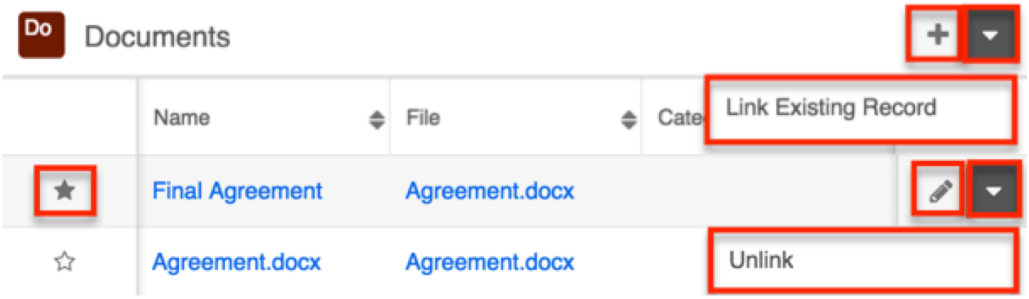
The type of subpanel displayed out-of-the-box on a quoted line item's record view is the Documents and Related Quoted Line Items subpanel. For every relationship between two modules, the relationship type determines whether a related record

will be displayed in the field listing or in a subpanel. Quoted line items may be related to multiple documents, so the associated documents will be displayed in a subpanel below the record's fields.

Users with administrator or developer access have the ability to change the fields (e.g. Name, Status, etc.) and labels of the subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.

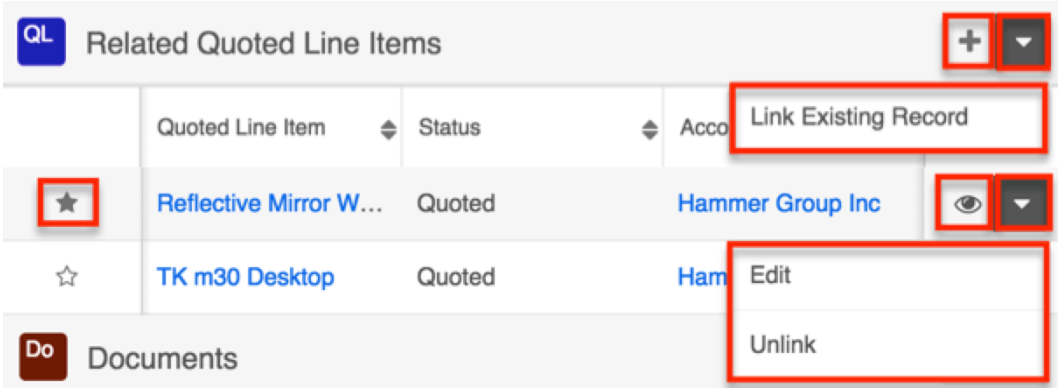
Related record subpanels allow the following operations to be performed:

- To view the details of a related record, click the record's name in the subpanel to open it in record view.
- To relate an existing record to the quoted line item, choose "Link Existing Record" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the quoted line item, click the Plus button to the left of the Actions menu, then complete the record view layout and click "Save".
- To delete the quoted line item's relationship to a record, choose "Unlink" from the Actions menu on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To mark the record as a favorite, click the star icon to the left of the desired record's row.
- To collapse or expand the subpanel, click anywhere on the subpanel's header.
- To change the column size in the subpanel, place your cursor on the column divider and when the Left and Right arrow appears, click and drag the column to the desired size. For more information on resizing columns, please refer to the Column Resizing section of this documentation.
    - Sugar enforces a minimum width for currency fields (e.g. Best, Likely, etc.) in list view columns which prevents the columns from being collapsed beyond this limit.
    - Note: The subpanel column width will not be preserved when you navigate away from the page.



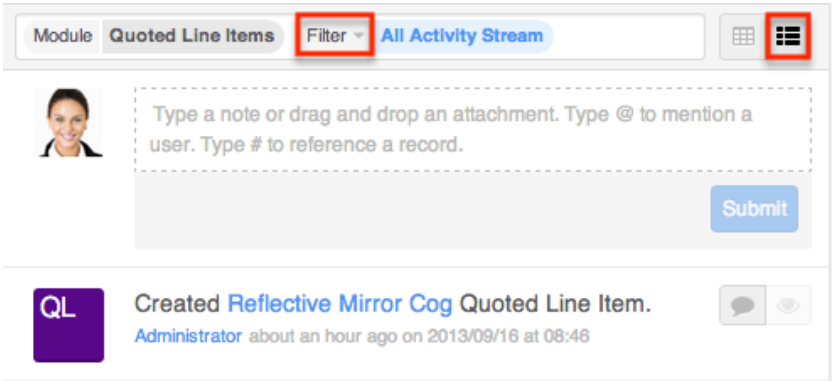
Related Quoted Line Items

The Related Quoted Line Items subpanel allows users to relate similar quoted line items to the quoted line item record to keep track of it in the system. Simply choose "Link Existing Record" from the subpanel's Action menu, then locate and select the desired record to relate to the current quoted line item record. The related quoted line item(s) will appear in the Related Quoted Line Items subpanel. To inline edit the record directly from the subpanel, choose "Edit" from the Actions menu on the far right of the record's row and click "Save" to preserve the change. To delete the related quoted line item's relationship, choose "Unlink" from the Actions menu. You can preview the related record as well by clicking the Preview icon to the left of the Actions menu. Click the star icon to the left of the desired record's row to mark the record as a favorite.




## Activity Stream

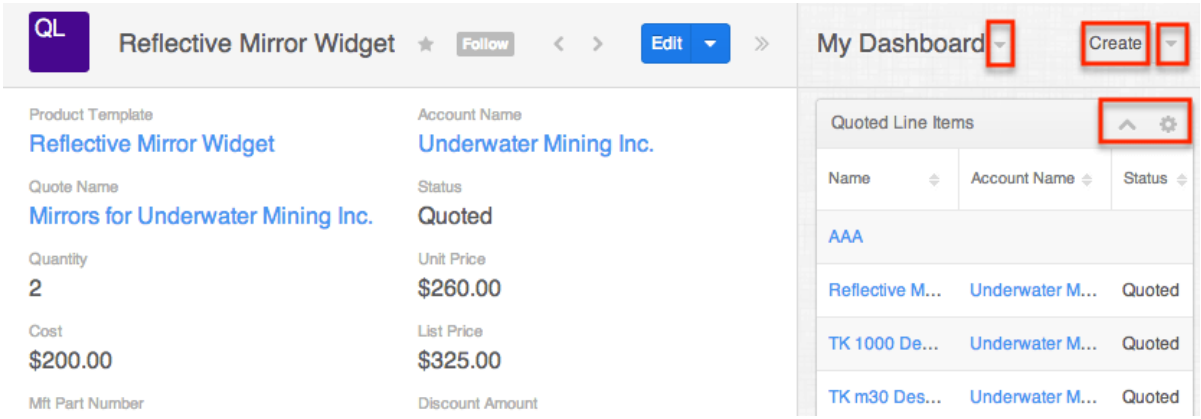
The record view's activity stream displays user posts and record posts specific to the individual quoted line item record. To view the record's activity stream, simply click the Activity Stream button below the quoted line item's fields. Users can view all posts in the record view's activity stream even if they do not follow the record in Sugar. Please note that you must follow the record if you wish to view the record view posts via the Home page or List View activity stream. For more information on how to add posts to the activity stream, please refer to the[Activity Streams](#) documentation. You can add comments to posts by clicking the Comment button to the far right of each post, entering in your comment, then clicking "Reply". You can also preview the record referenced in the record post by clicking the Preview button. The activity stream can also be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box then selecting the desired message type.




## Intelligence Pane

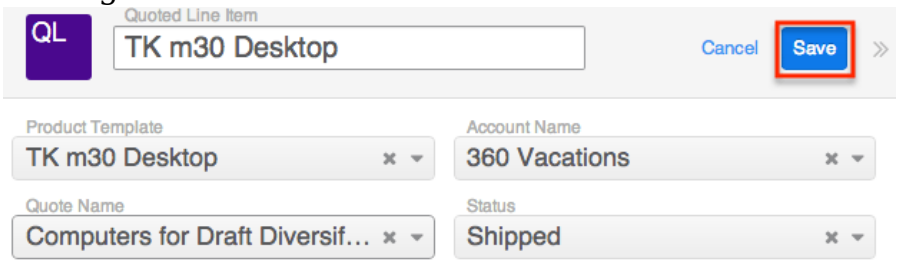
An intelligence pane displays to the right of the quoted line item's record view and provides users with valuable information specific to the quoted line item record.The Help Dashboard normally displays by default along with the Record View Help dashlet and Learning Resources dashlet. The Record View Help dashletprovides users with a brief introduction to the module along with some instructions to help users utilize and navigate around the record view. A link to the corresponding documentation (e.g. Quoted Line Itemsdocumentation) in the Application guide is also provided within the Help dashlet. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard, which will display some stock dashlets (e.g. Planned Activities dashlet, History dashlet , etc.) by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard".Users may choose to view any of their dashboards using the triangle to the right of the current dashboard's name and may create other dashboards for use with the Quoted Line Items module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do not wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Quoted Line Items module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.




## Editing Quoted Line Items

Quoted Line Items may be edited at any time to update or add information to the record. You can make changes to existing quoted line item records via the Quoted Line Items record view. The record view is available within the Quoted Line Items module and includes all of the fields you should need. Your quoted line item record will include some fields which are automatically populated when and if a Product Catalog item is selected.

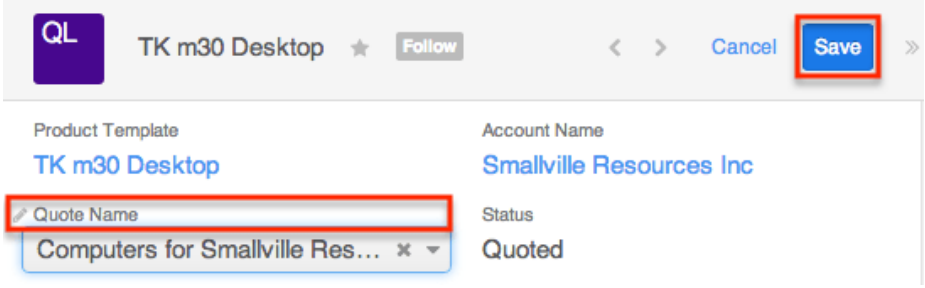



Please note that your ability to edit quoted line items in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure the Quoted Line Items record view via Admin > Studio. For more information on configuring layouts, please refer to the documentation in the Administration guide.

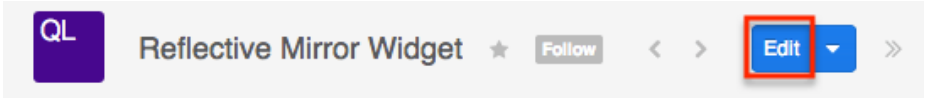
### Editing Inline Via Record View

Users can edit individual fields on the Quoted Line Items record view without entering the full edit mode by clicking thefield name. Fields which are available for inline editing will display a pencil icon when hovering on the field name or value.This will allow users to type or select a new value. Click "Save" to preserve the changes made to the field.



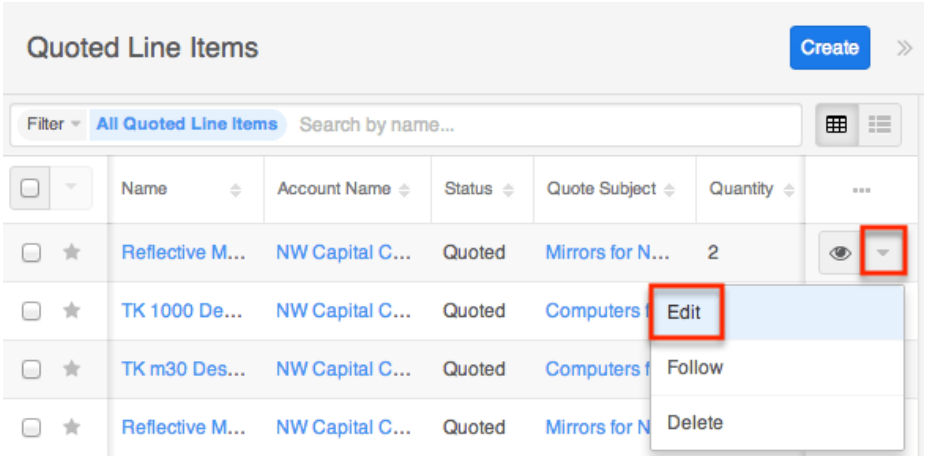

## Editing Via Record View

You can edit many quoted line item fields at once via the record view by clicking the Edit button on the upper right of the page. Once the record view layout is open, update the necessary fields, then click "Save" to preserve the changes made.

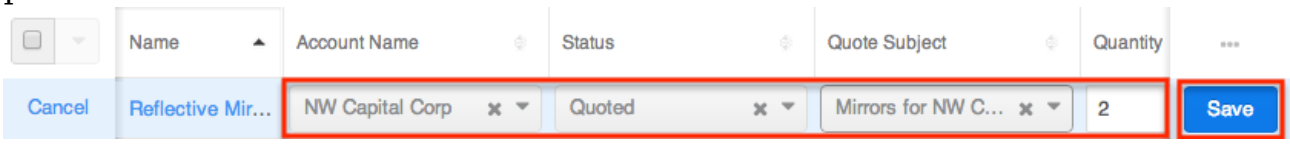



## Editing Inline Via List View

You can also edit individual fields on the Quoted Line Items list view without entering the full edit mode. Click the Record Actions menu to the far right of the record's row and select "Edit".




The fields on the record's row will open up allowing user's to type or select a new value. You can click the double arrow icon on the upper right of the page to expand the list view for editing. Click "Save" to preserve the changes made to the quoted line item record.




Note: Text area fields are not inline editable from list views.

# Deleting Quoted Line Items

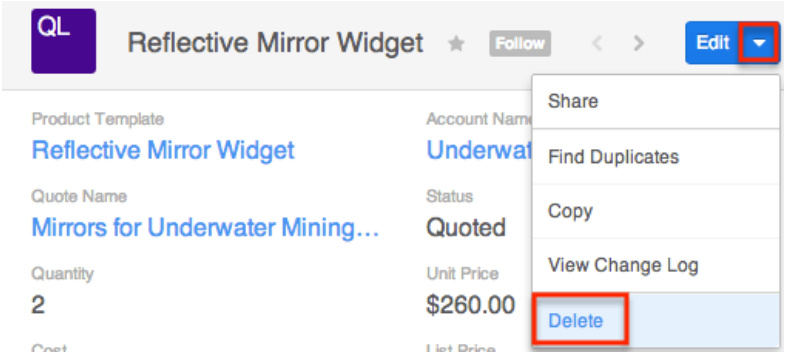
If a quoted line item record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Quoted Line Items record view or list view. Deleting via the record view allows you to delete a single record while the list view allows for mass deleting multiple records at once as well as single record deletions. Deleting quoted line item records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

Please note that your ability to delete quoted line items in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

## Deleting Via Record View

Use the following steps to delete a quoted line item record via the record view:

1. Navigate to a quoted line item's record view.
2. Select "Delete" from the Actions menu.




3. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

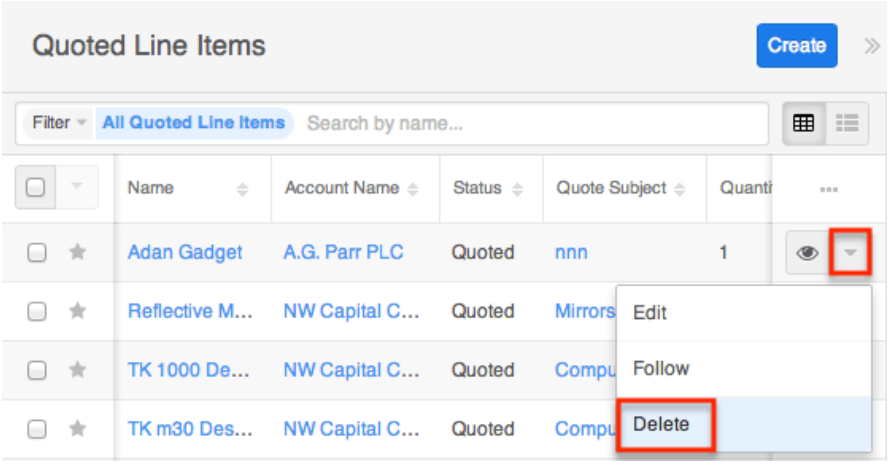
## Deleting Via List View

Use the following steps to delete a quoted line item record via the list view:

1. Navigate to the Quoted Line Items list view by clicking the Quoted Line Items module tab.
2. Use the Module Search to find the Quoted Line Item record you wish to

delete.

3. Click the Record Actions menu to the far right of the record's row and select "Delete".

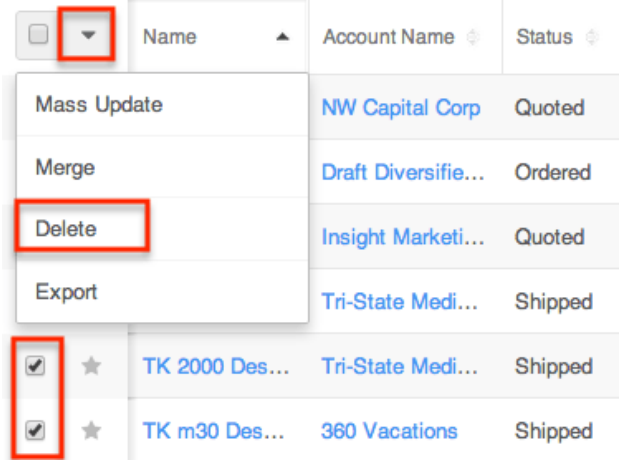



4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

## Mass Deleting Via List View

Use the following steps to delete one or more quoted line item records via the list view:

1. Navigate to the Quoted Line Items list view by clicking the Quoted Line Items module tab.
2. Use the Module Search to find the Quoted Line Item records you wish to delete.
3. Select the desired records then choose "Delete" from the Actions menu.




4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

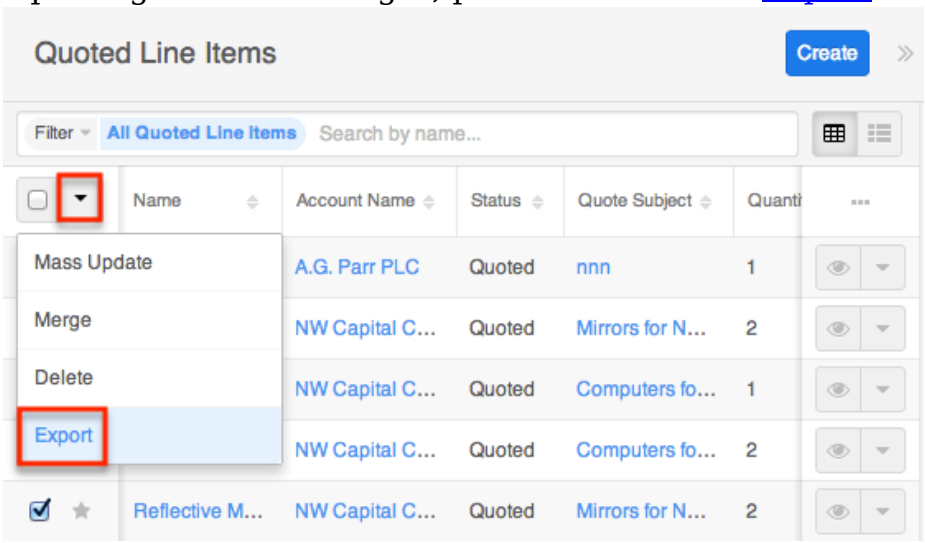
You can also use the Select All feature in the list view, which will allow you to

easily select the first 1000 records in the result set. If you wish to delete more than 1000 records or delete a specific group of records on the list view, please use the in module search to perform the deletions in smaller batches.

## Exporting Quoted Line Items

Sugar's Export option allows users to download all fields for the selected quoted line items to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Quoted Line Item data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered quoted line items back into Sugar. For more information on updating existing records via import, please refer to the Import documentation.Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of quoted line item records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Records may be exported from the Quoted Line Items list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for quoted line items and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.




Please note that your ability to export quoted line items from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

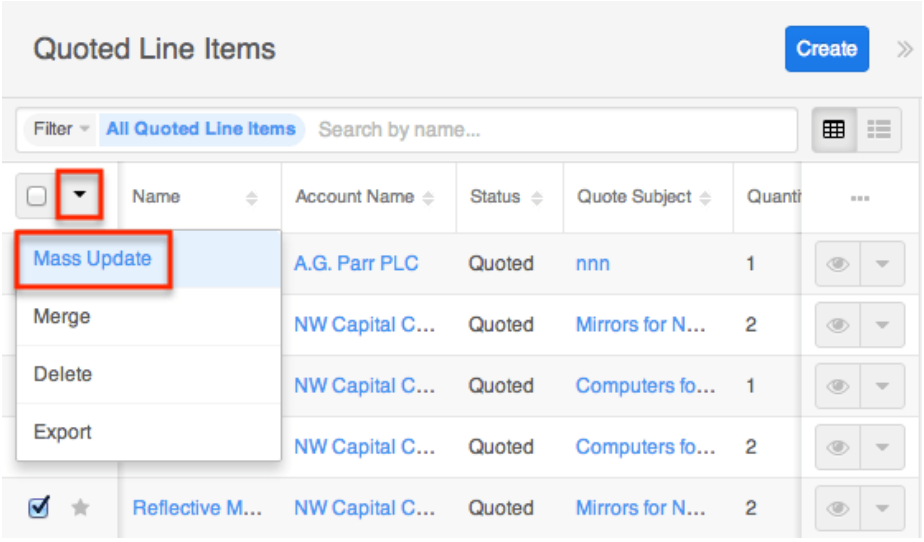
## Mass Updating Quoted Line Items

Mass Updating allows users to make the same change to multiple records at once from the Quoted Line Items list view. Users with administrator or developer level access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide. You can use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to update more than 1000 records or update a specific group of records on the list view, please use the filter option in module search to perform the updates in smaller batches.

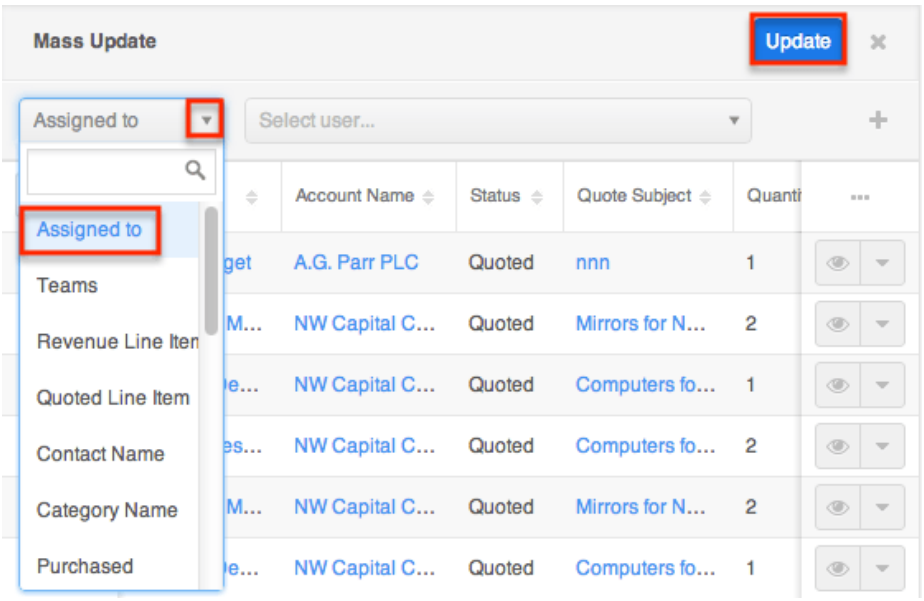
Please note that your ability to mass update quoted line items may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

Use the following steps to mass update quoted line item records from the list view:

1. Navigate to the Quoted Line Items list view by clicking the Quoted Line Items module tab.
2. Use the Module Search to identify quoted line items you wish to modify.
3. Select the desired quoted line items then choose "Mass Update" from the Actions menu.




4. The Mass Update panel will appear below the search bar. Set values for the field(s) you wish to alter.
    - To add additional fields for mass update, click the Plus icon to the right of the dropdown list.
    - Note: For the Teams field, mark "Append Team(s)" to add the teams specified here to any existing team assignments. Not marking the checkbox will replace the existing team assignment with the new one.




5. Click "Update" to save the changes to all of the currently selected quoted line item records.

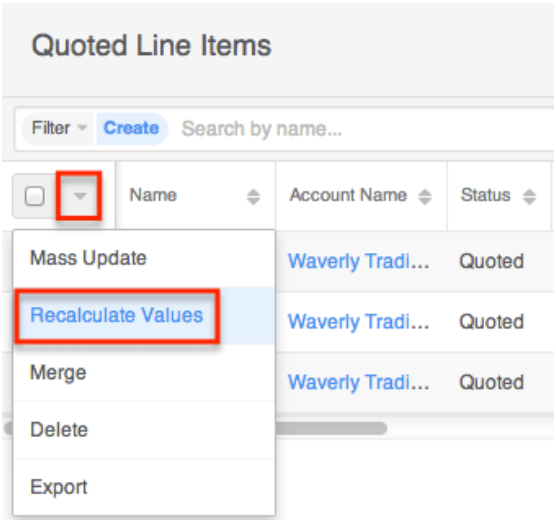
## Recalculating Calculated Values

This feature allows calculated values to be recalculated following the addition or alteration of a calculated field in Studio.For more information on calculated fields, please refer to theStudio documentation in the Administration guide.Sugar allows you to select up to 1000 records at a time for recalculating values. If you desire to recalculate values for more than 1000 records, you will need to perform the recalculation in several batches.

Note: This action will not appear unless the user is an Admin or has developer-level access to the module and if there is at least one calculated value in that module.Please note that your ability to recalculate valuesmay be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Recalculate Valuesoption.

The following steps cover recalculating values forrecords from the Quoted Line Itemslist view as an example:

1. Navigate to the Quoted Line Itemslist view by clicking the Quoted Line Itemsmodule tab.
2. Use the list view'sModule Search to identify quoted line itemsyou wish to update.
3. Select the desired quoted line itemsthen choose"Recalculate Values" from the Actions menu.



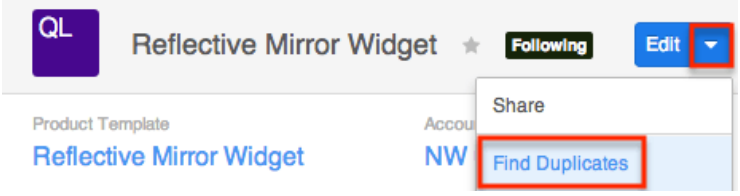

## Finding Duplicate Quoted Line Items

Between multiple users working in Sugar, importing new records, etc. it is possible for duplicate quoted line item records to be accidentally input to the system. Before creating a new quoted line item record, a good practice is to first check that the quoted line item does not already exist in Sugar. You can locate duplicate records for cleanup using module search from the Quoted Line Items list view. Searching for quoted line items with similar names or other information can turn search into a powerful, duplicates-finding tool. Sugar also provides a wizard for finding potential duplicates that is available from the Quoted Line Items record view and may be used as shown below. If duplicate quoted line item records are detected, you can perform a merge per the Merging Quoted Line Items section of this documentation.

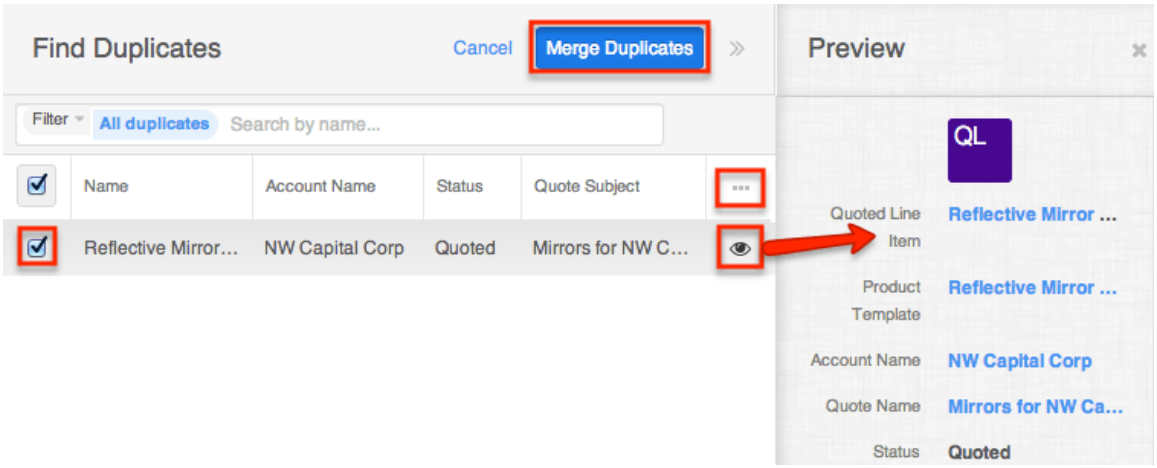
Please note that your ability to use the Find Duplicates action may be restricted by any role which prevents quoted line item deletion. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Find Duplicates option.

Use the following steps to locate duplicate quoted line items using the Find Duplicates option from the Quoted Line Items record view:

1. Navigate to a quoted line item's record view.
2. Choose "Find Duplicates" from the Actions menu.



3. Potential duplicate quoted line item records will be listed on the Find Duplicates page. Select the duplicate record(s) you wish to merge then click "Merge Duplicates".
    - You can preview the duplicate record's details by clicking the Preview button to the far right of the records row.
    - You can search for specific records from the Quoted Line Items list view if you wish to check for more possible duplicates. For more information on performing a search, please refer to the Module Search section of this documentation.
    - You can also click the Column Selection icon above the Preview button to change the list of fields that display on the list view column headers.




Once you click "Merge Duplicates", the merging process with the current record will begin. For instructions on performing the merge that follows, please refer to Steps 3-9 of the Merging Via List View section of this documentation.

## Merging Quoted Line Items

When duplicate records are identified in Sugar, you have the option to merge two or more quoted line items into a single record. Once the merge is complete, the duplicate quoted line item record(s) will be deleted, and the primary record will remain. Please note that all relationships belonging to the duplicate quoted line items will be merged to the primary record with the related records now linked to the resulting, merged quoted line item record.

Note: Date Created, Date Modified, and Password field types are not supported when merging duplicate records in Sugar.

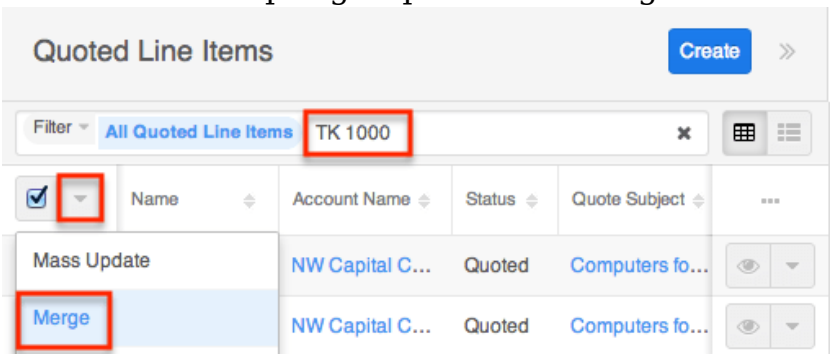
### Merging Via List View

Module Search may be used to identify duplicate quoted line items by, for

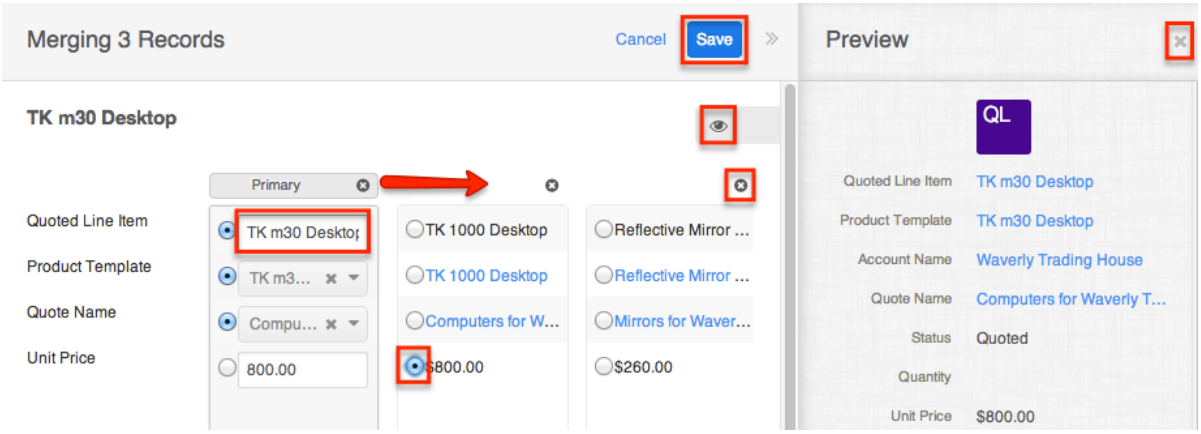
example, searching for records with similar name. Once your search has identified duplicate quoted line items, you can merge them directly from the Quoted Line Items list view.

Use the following steps to merge quoted line items via the list view:

1. Use the list view's Module Search to identify duplicate quoted line items.
2. Possible duplicates will be displayed in the list view. Select the duplicate record(s) that you wish to merge.
    - Please note that up to five records may be merged at once in Sugar. An error message ("Invalid number of records passed. The valid range is from 2 to 5 records.") will appear if more than five records are selected when attempting to perform a merge.




3. Select "Merge" from the Actions menu to display the Merging Records page. The primary record's field values are displayed on the left while other record's values are in columns to the right. For convenience, fields with differing values will appear on the top of the list. Saving the merge will preserve only the field values marked with the radio button into a single record.




If3 or more records are selected to be merged, an X icon will appear at the top right of each record. Clicking the "X" will remove the record from the merge process but will not delete the record.

4. To change which record is considered the primary, drag and drop the Primary label on the top of a different column.
5. Review the field values in each column and click the radio button to the left of the value that should appear on the final record. You can also manually type or select a new value for any field as necessary.
    - Note: Fields you do not have Edit access for cannot be edited on the merging records page.
6. Preview what the final, merged record will contain as you work by clicking the eye icon to display the preview in the Intelligence Pane.
7. Click "Save" once all fields you wish to appear on the single, merged record have their radio buttons selected.
8. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Confirm" to proceed.

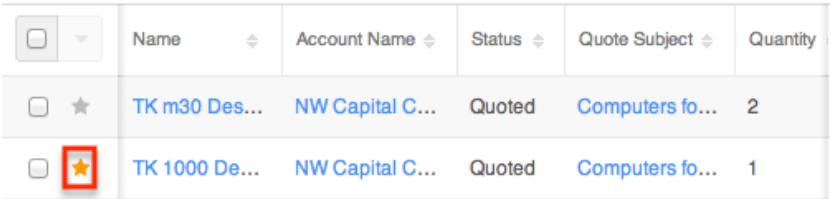
## Favoriting Quoted Line Items

Each Sugar user has the option to designate their own favorite quoted line items which are important or will be viewed often so that they can easily be accessed via search or from the Quoted Line Items module tab. Once records are marked as favorites, select "My Favorites" from the Filter option next to the Search bar to retrieve your favorites or select from you r most recent favorites directly from the

### Favoriting Via List View

Use the following steps to mark records as favorites via the Quoted Line Items list view:

1. Navigate to the Quoted Line Items list view by clicking the Quoted Line Items module tab.
2. Use the Module Search to find the records you wish to mark as favorites.
3. Mark the star icon on the left of each desired quoted line item's row.

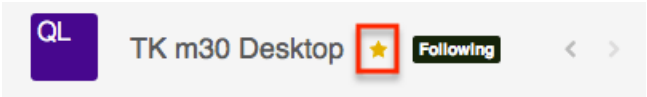



4. To remove the quoted line item as a favorite, click the star again to revert it to gray.

### Favoriting Via Record View

Use the following steps to mark records as favorites via the Quoted Line Items record view:

1. Navigate to a quoted line item's record view.
2. Click the star icon to the right of the quoted line item's name in the upper left of the record view to designate it as a favorite.

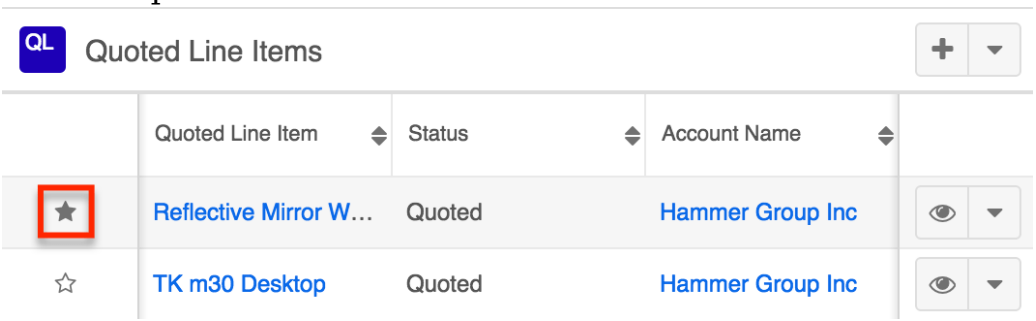



3. To remove the quoted line item as a favorite, click the star again to revert it to gray.

### Favoriting Via Subpanel

Use the following steps to mark quoted line item records as favorites via the subpanel in related modules:

1. Navigate to a related module's record view.
2. Click the star icon to the left of the desired record's row in the Quoted Line Items subpanel.




3. To remove the quoted line item as a favorite, click the star again to revert it to white.

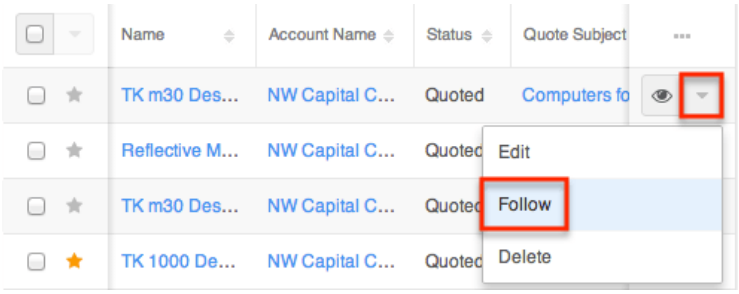
## Following Quoted Line Items

Users can also choose to follow specific quoted line item records to which they have access to in Sugar by clicking the Follow button (If grayed out) to the right of the record's name. This allows each user to personalize their activity stream by specifying which records' posts should appear on the activity streams displayed on their Home page and Quoted Line Items list view.Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. Should a user lose access to a record in Sugar, they will automatically stop following that record.

### Following Via List View

Use the following steps to mark a record to follow via the Quoted Line Items list view:

1. Navigate to the Quoted Line Items list view by clicking the Quoted Line Items module tab.
2. Use the Module Search to find the records you wish to follow.
3. Click the Record Actions menu to the far right of the records row and select "Follow".

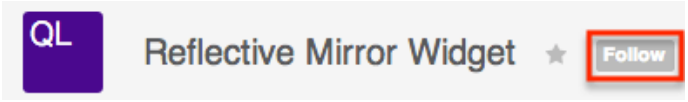



4. To stop following the quoted line item, click the Record Actions menu then select "Unfollow".

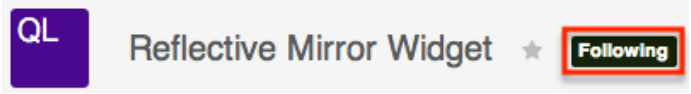
### Following Via Record View

Use the following steps to mark a record to follow via the Quoted Line Items record view:

1. Navigate to a Quoted Line Items record view.
2. Click the Follow button to the right of the quoted line items name.



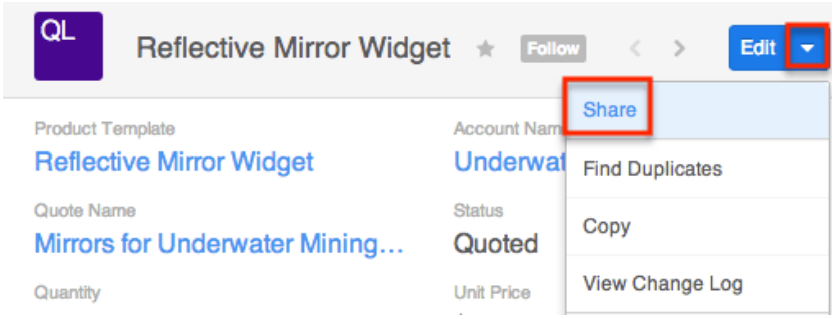

3. To stop following the quoted line item, click the Follow button again to revert it to gray.




## Sharing Quoted Line Items

Individual Quoted Line Item records can be shared with other users in your organization by sending an email with the record's link directly from the record view. In the quoted line item's record view, select "Share" from the Actions menu

which will open a Compose Email window including the URL of the quoted line item record. Enter the recipient(s) email address in the To field then click "Send".




Users can simply click the link in the email to access the quoted line item record in Sugar. Please note that the user must be logged into Sugar in order to access the record. Users will only be able to view the shared record as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

## Downloading Quoted Line Item Information as a PDF

Users have the option to download quoted line item information as a PDF file via the Quoted Line Items record view by clicking the Actions menu and selecting "Download PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Download PDF option in the Actions menu. Simply select one of the templates to generate the PDF file to view or save onto your local machine. Please note that the Download PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.

## Emailing Quoted Line Item Information as a PDF

Users also have the option to email quoted line item information as a PDF file using any of the available Quoted Line Items module templates using Sugar's email client. Simply click the Actions menu and select "Email PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Email PDF option in the Actions menu.

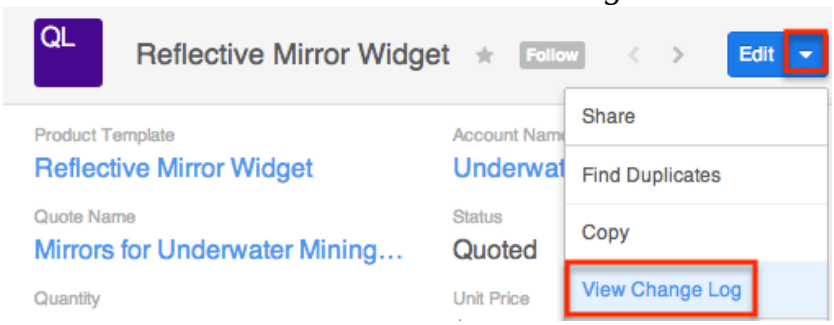
Select one of the templates to open a Compose window in the Emails module. The email's To field will automatically populate with the email address of the quoted line item record, and the Subject field will display the quoted line item's name. The email is automatically related to the quoted line item record, and the chosen

quoted line item PDF will be attached. You can update the fields as necessary and enter a body for the email message then click "Send". For more information on sending emails via the Emails module, please refer to the Emails documentation.

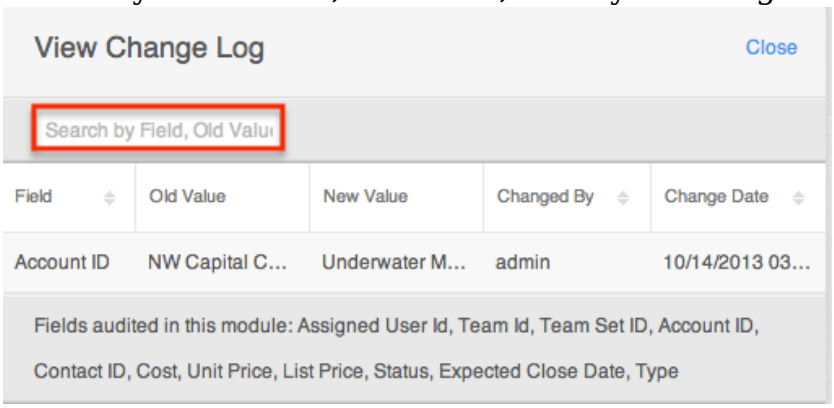
Please note that the Email PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.

## Viewing Quoted Line Item Change Logs

Changes made to each quoted line item record are tracked over time, and users are able to view the history of changes via the change log in each quoted line item's record view. To view the change log, navigate to a quoted line item in record view and select "View Change Log" from the Actions menu. Please note that only fields marked as "Audit" in Admin > Studio will be displayed in the change log. For more information on designating for audit, please refer to the Studio documentation in the Administration guide.




Once the change log opens, you can view the details of historical changes and can search by field name, old value, etc. by entering the keyword into the search box.




## Updating Currency Rates

When saving a quoted line itemin a currency that differs from the system-defined default currency, Sugar will store the conversion rate for that currency at the record level. This conversion rate is used to calculate the converted amountswhen they are set to use the system default currency (as opposed to the user's preferred currency which is explained below). To keep amounts historically accurate, the conversion rate will only update on a quoted line itemprovided the status is not set to "Shipped". If the line itemis in any other sales stage, the conversion rate will update under the followingscenarios:

- The quoted line itemundergoes a save event (e.g. mass update, manual save, etc.) and the record's currency has a different conversion rate defined in Admin > Currencies than is currently saved in the line item.
- An administrator updates the currency exchange rate under Admin > Currencies. This will trigger a scheduled job which updates all quoted line itemssaved with that currency to the newrate.

When the viewing user's profile has the Show Preferred Currency option selected, the converted amountfields display in the user's preferred currency. In this case, the conversion rate is drawn directly from the conversion rate at the system level rather than any conversion rate stored on the record. This means that the value will always use the current conversion rate regardless of the quoted line item'sstatus. For this reason, the Price and List fields should not be considered historically accurate for closed business when it is using the user's preferred currency. For information about setting a user's Preferred Currency and Show Preferred Currency options, please refer to theUser Profile documentation.

For more information about currency exchange rates, please refer to theSystem documentation in the Administration guide.

Last Modified: 03/03/2016 04:18pm

# Contracts

## Overview

Sugar's Contracts module consists of individual business arrangements your organization has with vendors, customers, or association. There are various ways you can create contracts in Sugar such as via the Contracts module, importing contracts, duplication, etc. Once the contract record is created, you can view and edit information pertaining to the contract via the Contracts detail view. Each contract record may then relate to other Sugar records such as opportunities, documents, quotes, and many others. This documentation will cover how to use the

Contracts module as well as the various actions and options available from within the module.

Note: This module is hidden by default. The administrator must display it for your use.

## Contract Fields

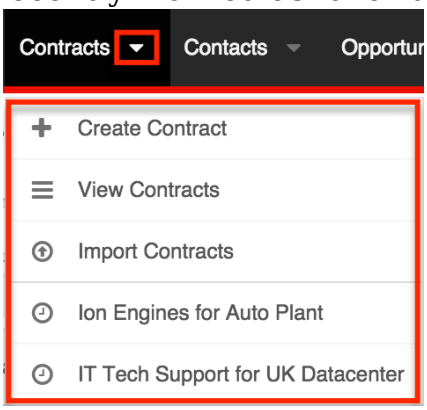
The Contracts module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

| Field | Description |
|---|---|
| Account Name | The account to which the contract belongs |
| Assigned To | The Sugar user assigned to the contract |
| Company Signed Date | Date on which your organization signed the contract |
| Contract Name | The name or designation of the contract |
| Contract Term | Calculation of days between the start and end date of the contract |
| Contract Value | The value of the contract for the specified currency |
| Currency | The currency used to represent the contract value |
| Customer Signed Date | Date on which the account signed this contract |
| Date Created | The date the contract record was created |
| Date Modified | The date the contract record was last modified |
| Description | A description or other information about the contract |
| End Date | Date on which this contract expires |
| Expiration Notice | Date and time to send a reminder to the assigned user indicating that this contract will expire shortly |

| | |
|---|---|
| | Note : Assignment notifications must be turned on and the "Process Workflow Tasks" scheduler must be running. |
| Opportunity Name | The opportunity if any, from which the contract originated or is related to |
| Reference Code | The internal designation used to refer to this contract |
| Start Date | Date on which this contract takes effect |
| Status | The current status of the contract (e.g. Not Started, In Progress, Signed) |
| Teams | The Sugar team(s) assigned to the contract record |
| Type | The type assigned to the contract<br>Note : Types are created in Admin > Contract Types and come with no options by default. |

## Contracts Module Tab

The Contracts module tab is typically located under the More tab on the navigation bar at the top of any Sugar screen to the right of the home cube icon. Depending on your settings, you may have to click "Show More" in order to see the Contracts module tab. Click the tab to access the Contracts list view. You can also click the triangle on the Contracts module tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of contracts you last viewed in the module. The Favorites menu displays the list of contracts you most recently marked as favorites in the module.




The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|---|---|
| | |

| | |
|---|---|
| Create Contract | Opens the edit view layout to create a new contract |
| View Contracts | Opens the list view layout to search and display contracts |
| Import Contracts | Opens the import wizard to create or update contracts using external data |

If you do not see the Contracts module tab in Sugar, please check the following:

- The Contracts module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Contracts module in the Hide Modules list, simply move it to the Display Modules list and save. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Contracts module for your entire Sugar instance. Reach out to your Sugar administrator to have the Contracts module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

## Creating Contracts

There are various methods for creating contracts in Sugar including via the Contracts module, quick create, duplication, and importing contracts. The full edit view layout opens when creating the contract directly from the Contracts menu and includes all of the relevant fields for your organization's contracts. The quick create form is a shortened version of the contracts edit view and typically contains fewer fields. When using quick create to make a contract while viewing an existing record of another module, Sugar automatically creates a relationship between both records. For example, if you are viewing an account record (e.g. ABC Company) and create a new contract via the quick create form, the Account Name field in the contract record will automatically populate with "ABC Company", thus creating the relationship. Both the Edit View and Quick Create layouts can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

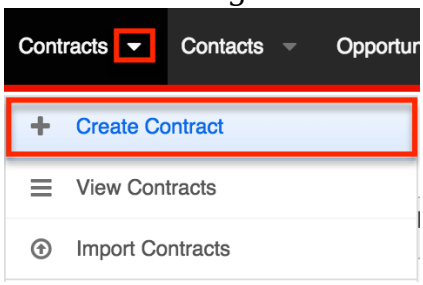
### Creating Via Contracts Module

One of the most common methods of contract creation is via the Create Contract option in the Contracts module tab. This opens up the edit view layout which

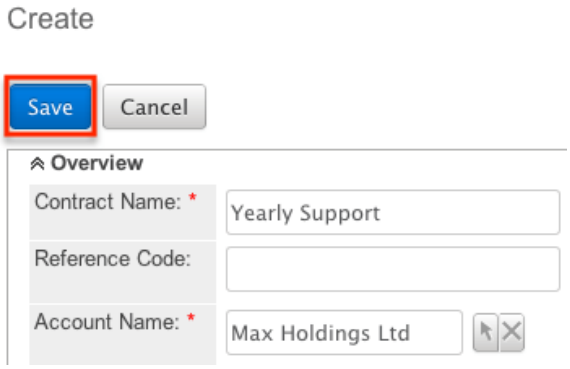
allows you to enter in all the relevant information for the contract.

Use the following steps to create a contract via the Contracts module:

1. Click the triangle on the Contracts module tab and select "Create Contract".




2. Enter appropriate values for the fields in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".

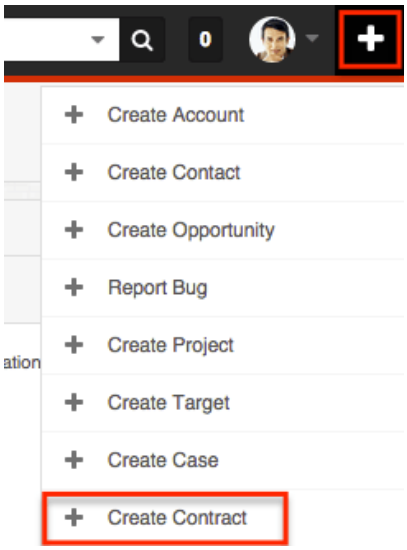



## Creating Via Quick Create

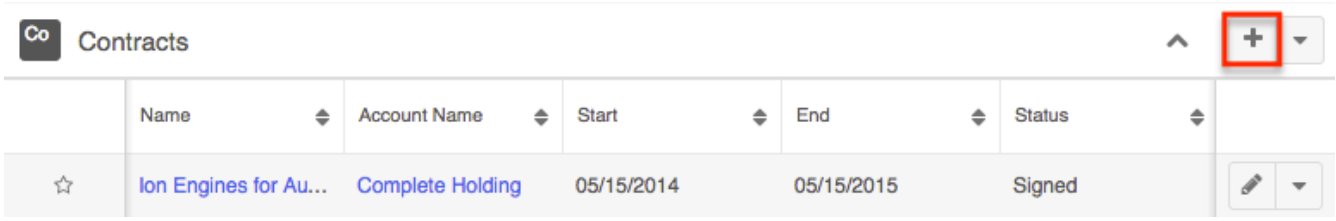
The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also quick create a contract from any Contracts subpanel on related module records.
Note: Quick create for the Contracts module is disabled by default, but can be enabled via Admin > Configure Navigation Bar Quick Create. For more information on how to enable modules to be used for Quick Create, please refer to the Developer Tools documentation in the Administration guide.

Use the following steps to create a contract via Quick Create:

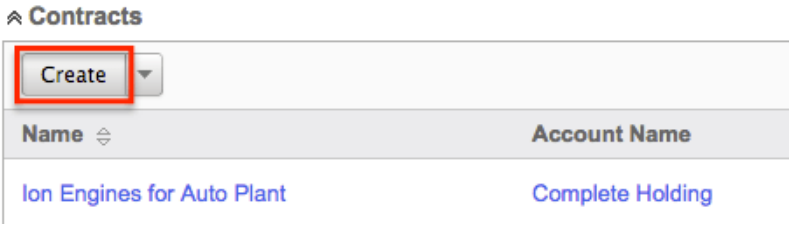
1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Contract". You can also quick create contracts using the following methods below:
   From Quick Create menu:




From Contracts subpanel (Sidecar modules):




From Contracts subpanel (Legacy modules):



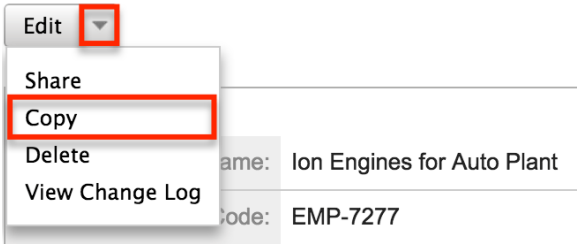

2. Enter appropriate values in the fields in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
3. If creating the contract via the Contracts subpanel in a Legacy module and additional fields are desired, click the Full Form button to use edit view instead.
4. Once the necessary information is entered, click "Save".



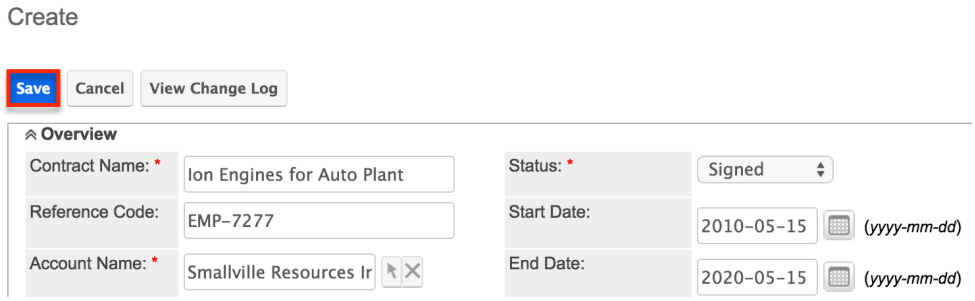

## Creating Via Duplication

You can also create a new contract by duplicating an existing contract record. The duplicate option is useful if the contract you are creating has similar information to an existing contract.
Use the following steps to create a contract by duplicating an existing record:

1. Navigate to a contract record's detail view.
2. Select "Copy" from the Actions menu.



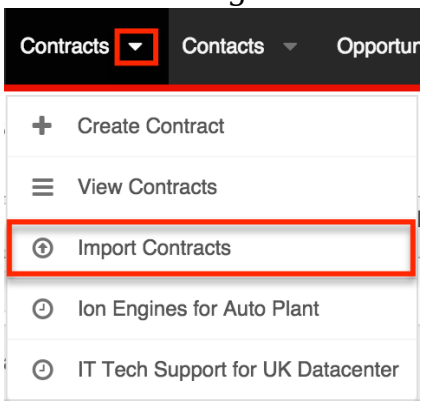

3. The displayed edit view is pre-populated with the original contract's values. Update the necessary fields, then click "Save".




## Importing Contracts

The import function allows you to push multiple contract records into Sugar using a comma (or other character) delimited file instead of creating them one-by-one. For more information on importing, please refer to the Import documentation.
Use the following steps to import contracts via the Import Contracts option:

1. Click the triangle on the Contracts module tab and select "Import Contracts".



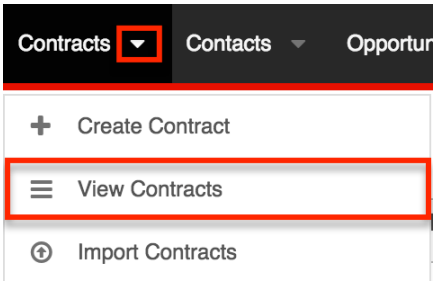
2. In Step 1, select the source of the data you are importing. Click "Next".
3. In Step 2, select the import file and choose "Create new records only". Click "Next".
4. In Step 3, confirm the import file properties. Click "Next".
5. In Step 4, confirm the field mappings for the import. Click "Next".
6. In Step 6, view the import results.
    - The Created Records tab will show all of the new contract records.
    - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
    - The Errors tab will show records that were not imported due to errors detected during import.

## Viewing Contracts

There are various options available for viewing contract records in Sugar including via Contracts list view, Contracts detail view, Contracts Recently Viewed menu, dashlets, and reports. Please note that you will only be able to see contract records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

### Viewing Via List View

The Contracts list view displays all contract records meeting the current search criteria. To access the list view, simply click the triangle on the Contracts module tab and select "View Contracts".




While list view shows key contract fields, you can click the contract's name to open the record in detail view. For more information on viewing contracts via list view, please refer to the Contracts List View section.

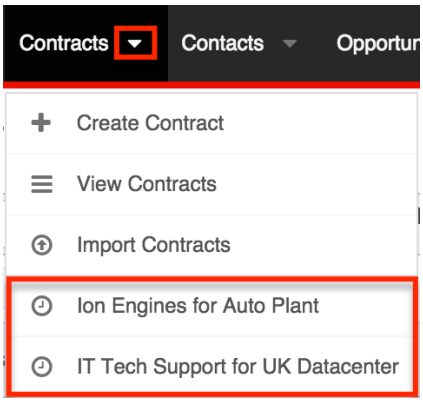
### Viewing Via Detail View

The Contracts detail view displays thorough contract information including all contract fields followed by subpanels of the contract's related records belonging to

various modules. The detail view can be reached by clicking a contract record's link from anywhere in the application including from the Contracts list view. For more information on viewing contracts via detail view, please refer to the Contracts Detail View section.

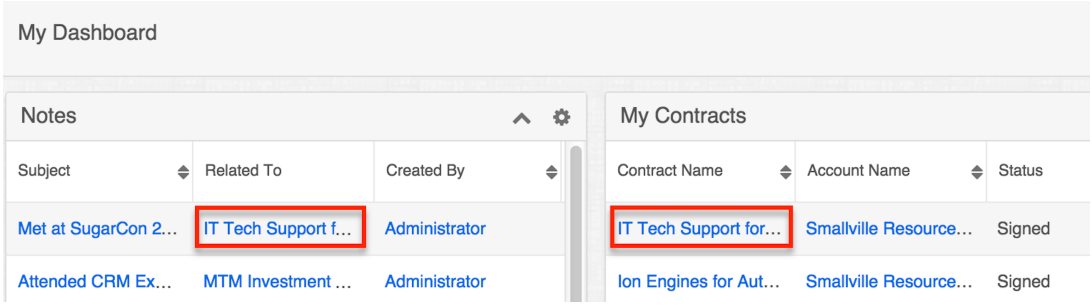
## Viewing Via Recently Viewed

As you work, Sugar will keep track of which contracts you have recently viewed. Click the triangle on the Contracts module tab to see a list of your most recently viewed contracts and click each name to open the contract in detail view.




## Viewing Via Dashlets

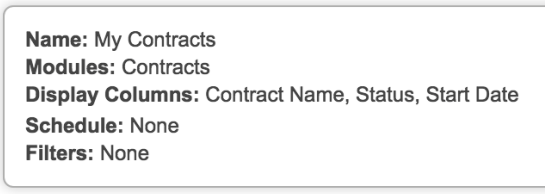
The Home page displays a collection of Sugar Dashlets which allow users to get a quick view of various records, activities, reports, etc. You can view contract information in dashlets based on other modules such as "My Notes". Clicking a contract's name from any dashlet will open the contract in detail view. For more information on using dashlets and viewing contract records via dashlets, please refer to the Dashlets section of the Home documentation.

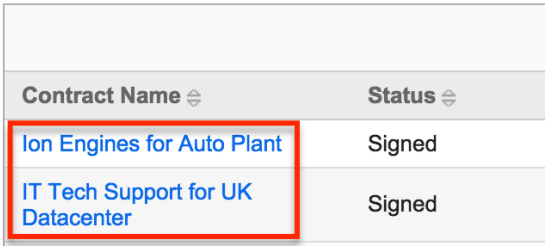



## Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding contracts and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex

filters to only display specific subsets of your records. Once the report is run, you will be able to view the contract record's detail view by clicking the contract's name in the report results. Please note that you can only directly access contract detail views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation.




Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Users documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

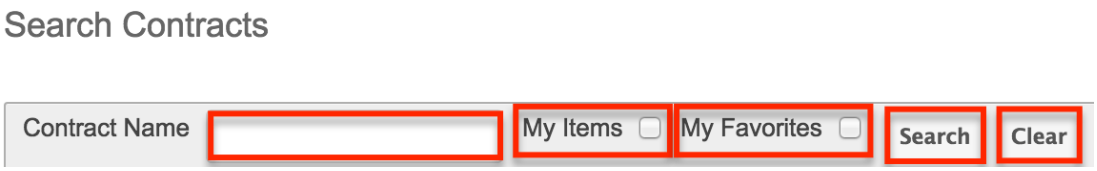
## Searching Contracts

The Contracts list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Contracts list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.
For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

### Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.
The buttons and checkboxes available in Basic Search panel have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Items : Select this box to return only records assigned to you.
- My Favorites : Select this box to return only records you have marked as favorites.



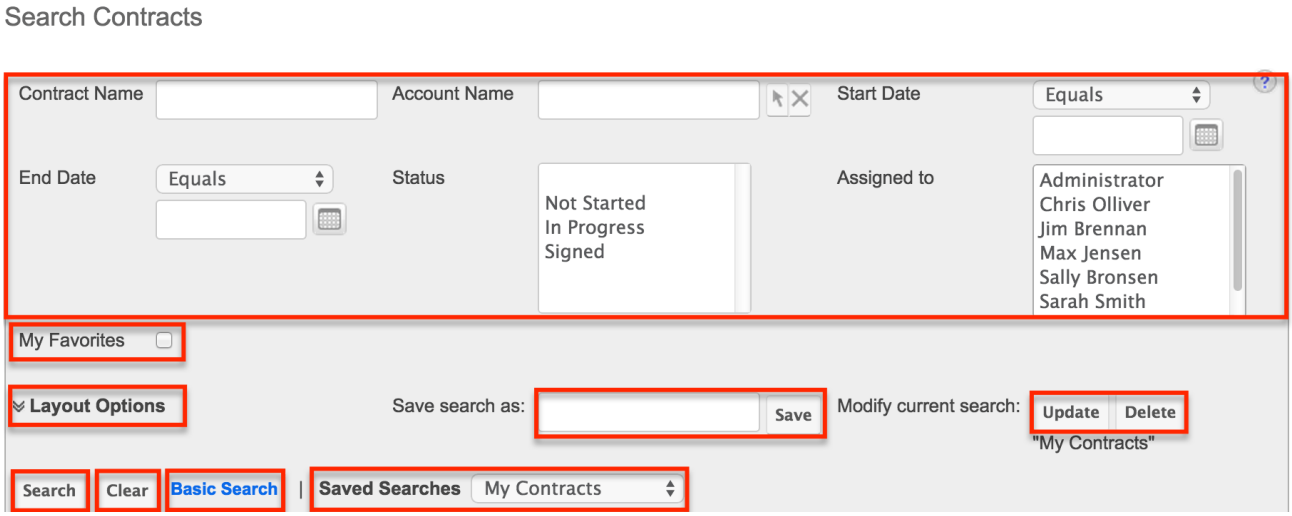

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Items" and enter a contract name, Sugar will only return contract records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all contract records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see contract records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.
Administrators can configure what fields appear on the Contracts Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Advanced Search

Advanced Search offers a more in-depth search experience than Basic Search including additional fields, layout options, and saved search capability. From the Advanced search panel, you can click "Basic Search" for simplified searching.
The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.

- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Favorites : Select this box to return only records you have marked as favorites.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the Layout Options section of the Search documentation.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section of the Search documentation.




When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select "My Favorites" and enter in a contract name to search, Sugar will only return contract records with a matching name that you have marked as favorites. When searching by a multiselect or dropdown field (e.g. "Assigned to"), however, Sugar will return records matching any of these selections. Once the search completes, the relevant results will populate in the list view below the search panel. To see all contract records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see contract records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

Administrators can configure what fields appear on the Contracts Advanced Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search may be used with Global Search to search

throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.




To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the Search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

## Contracts List View

The Contracts list view displays all contract records meeting the current search criteria and to which your user has access. You can view the basic details of each contract within the field columns. Please note that you will only be able to see contract records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

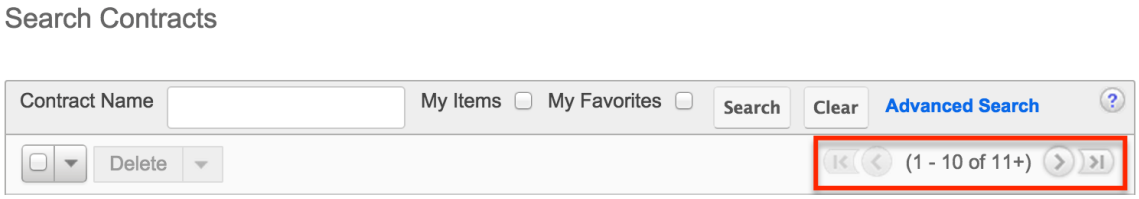
You have the option to change what fields are displayed in list view by configuring your layout options in the Contracts Advanced Search. For more information on configuring your list view, please refer to the Layout Options section of the Search documentation. Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

### Pagination

List view displays the current search results broken into pages that you can scroll

through rather than displaying potentially thousands of rows at once. To the right just below the search panel you can see which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of your current results.

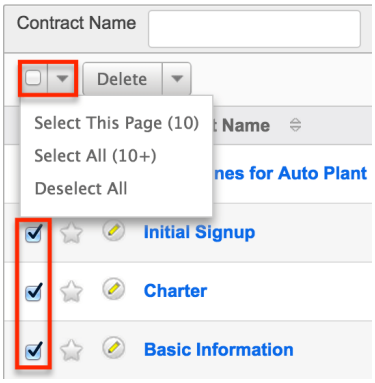
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.




## Checkbox Selection

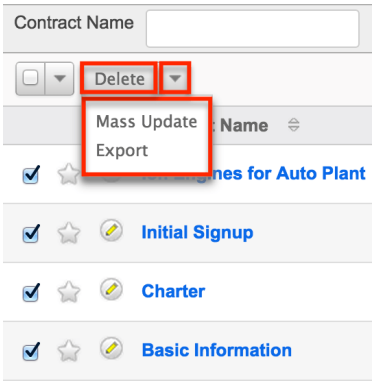
You can perform several actions on contract records directly from the list view by first selecting the desired records. To select individual contract records on the Contracts list view, mark the checkbox on the left of each row. To select or deselect multiple contract records on the list view, use the options in the checkbox dropdown menu:

- Select This Page : Selects all records shown on the current page of contract results.
- Select All : Selects all records in the current search results across all pages of contract results.
- Deselect All : Deselects all records that are currently selected.




## Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.

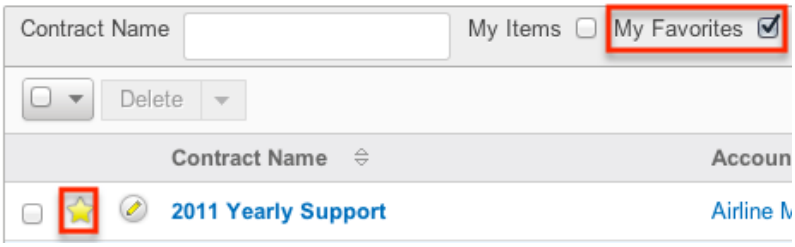



The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Delete | Delete one or more contracts at a time |
| Mass Update | Mass update one or more contracts at a time |
| Export | Export one or more contracts to a CSV file |

## Favorite Designation

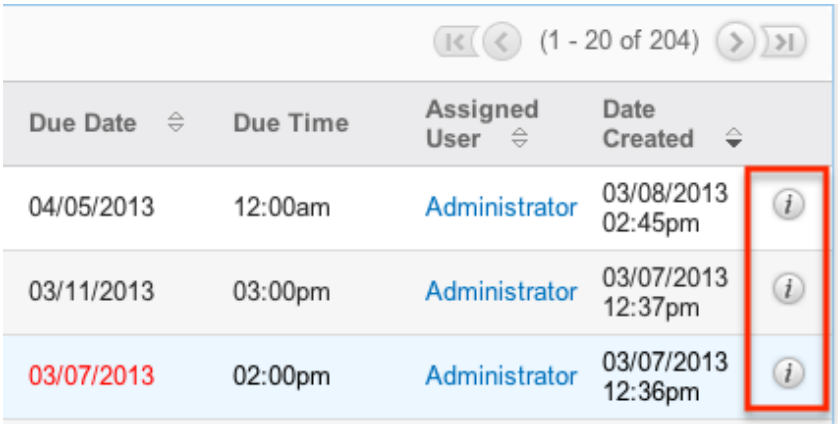
Users have the option to mark contract records as favorites via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Contracts module tab. In the Contracts list view, the star on the left of each contract's row is yellow once marked to indicate a favorite contract. For more information on marking records as favorites, please refer to the Favoriting Contracts section of this documentation.




## More Information

Additional details for each contract can be viewed by clicking the "i" icon to the far right of each list view row. This provides users a quick view of additional contract information in addition to what appears in the display column fields. The resulting

pop-up window will show the Reference Code, and Description fields by default. The list of fields appearing here may only be configured through a code-level customization.




## Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time. You can also set a default order-by column using the layout options in Advanced Search. For more information on setting a default column sort, please refer to the Layout Options section of the Search documentation.




# Contracts Detail View

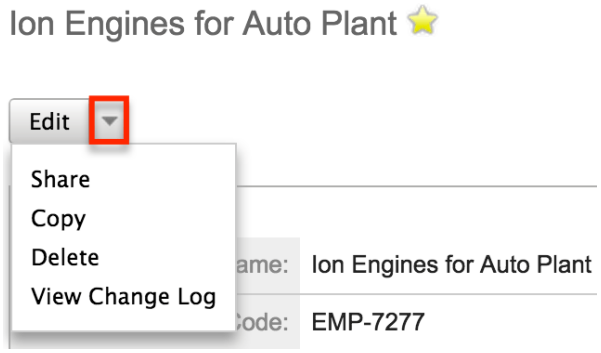
The Contracts detail view displays thorough contract information including all contract fields which are grouped by default into the Overview and Other panels. You can also view a contract's related records (Documents, Notes, Contacts, etc.) which appear in subpanels beneath the contract fields. The detail view can be reached by clicking a contract record's link from anywhere in the application including from the Contracts list view.

Please note that you will only be able to view a contract record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the

Studio documentation in the Administration guide.

## Actions Menu

The Actions menu on the top left of each contract's detail view allows you to perform various actions on the current record. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the System documentation in the Administration guide.

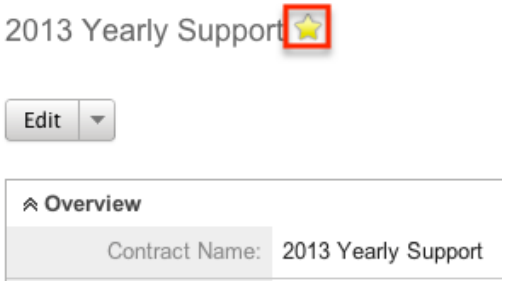



The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this contract |
| Share | Share a link to this contract via email |
| Copy | Copy this contract |
| Delete | Delete this contract |
| View Change Log | View a record of changes to this contract |

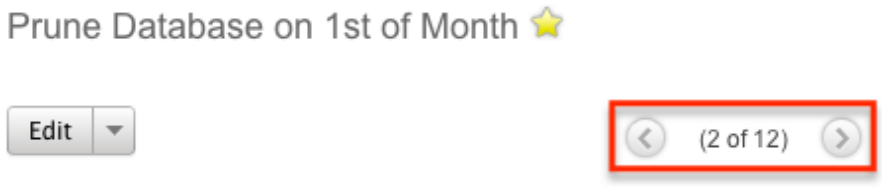
## Favorite Designation

Users have the option to mark contract records as a favorite via the detail view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Contracts module tab. In the Contracts detail view, the star on the right of the contract's name is yellow once marked to indicate a favorite contract. For more information on how to mark records as favorites, please refer to the Favoriting Contracts section of this documentation.




## Next or Previous Record

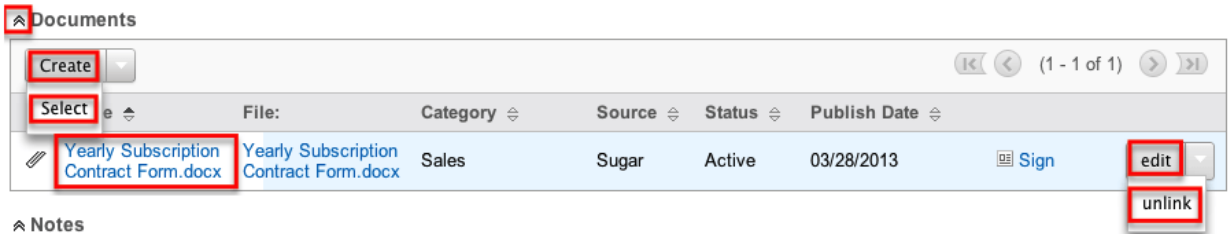
On the upper right of the Contracts detail view, there are two buttons that allow you to page through each contract in the Contracts list view's current search results. Clicking the Previous button displays the previous contract of the current search results while clicking the Next button displays the next contract of the current search results. The text in between shows which contract result you are currently viewing within the total number of current results.




## Related Record Subpanels

The most common type of subpanels displayed on a contract's detail view contain the contract's related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. For example, a contract may be related to only one account but related to multiple contacts. This means that the related account will be displayed amongst the contract's fields while contacts will be displayed in a subpanel beneath the fields.
Users with administrator or developer access have the ability to change the fields (e.g. Name, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.
Related record subpanels allow the following operations to be performed. Please note that administrators in Sugar can change the subpanel's Action menu to be displayed as separate buttons instead of a dropdown via Admin > System Settings. For more information, please refer to the System documentation in the Administration guide.

- To view the details of a related record, click the record's name in the subpanel to open it in detail view.
- To relate an existing record to the contract, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the contract, choose "Create" from the subpanel's Action menu, then complete the Quick Create form and click "Save".
- To edit a related record, choose "Edit" on the far right of the record's row.
- To delete the contract's relationship to a record, choose "Unlink" from the dropdown on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.




Please note that administrators can prevent users from moving subpanels to different locations in the detail view. For more information on preventing rearranging of subpanels, please refer to the System documentation in the Administration guide. Check with your system administrator if you are not able to rearrange your subpanels.

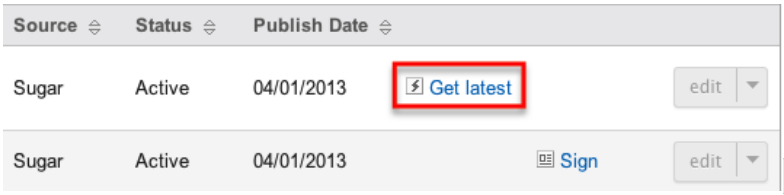
## Signing Documents

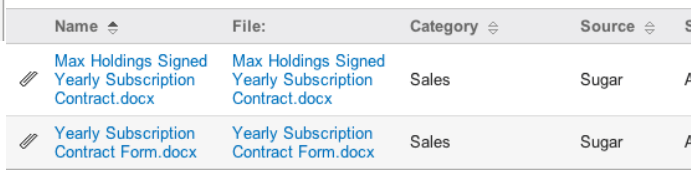
The documents subpanel gives users the ability to create and select documents to be attached to the contract record. Template documents give users the ability to perform additional actions on the document through the contracts module. This feature is best used for a standard contract or agreement document that the organization will have to sign. Once the contract is signed by the organization, users can click "Sign" on the related document record.




This prompts the user to create a new document record for the signed contract, which will be related to the template document as well as the contract record. You will now see both documents, the original contract template and the signed contract, in the documents subpanel of the contract record.

Once a document related to a contract gets revised you have the option of pulling the latest revision to be linked to the contract. Otherwise the version of the document that existed when linked to the contract will remain linked. Click "Get Latest" to link the most recent version of the document to the contract.

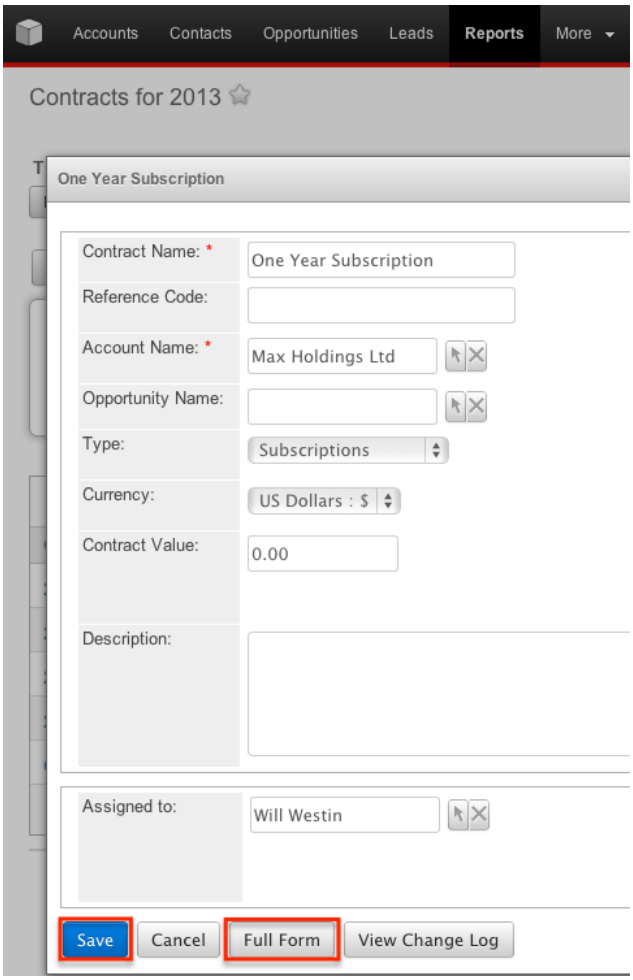



## Editing Contracts

Contracts may be edited at any time to update or add information to the record. You can make changes to existing contract records via the Contracts edit view and quick create forms. Edit view is available within the Contracts module and includes all of the Contract fields you should need.

Quick create is available for editing contracts from outside the Contracts module and opens as a pop-up without navigating away from your current page. It generally contains fewer fields, but the Full Form button may be used to access the full edit view should you need to edit additional fields.

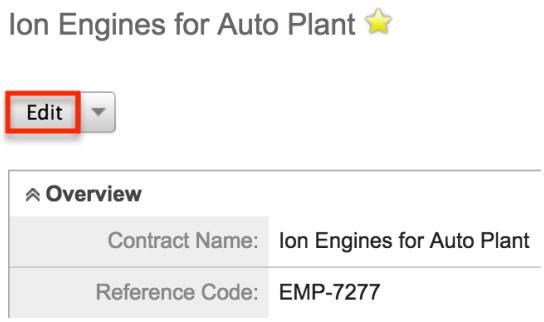



Please note that your ability to edit contracts in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure both the Contracts edit view and quick create via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

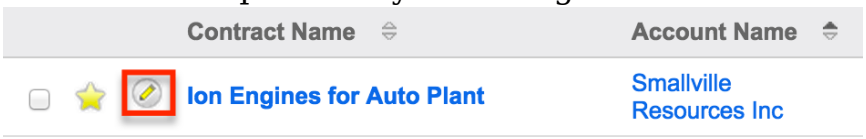
## Editing Via Detail View

You can edit contracts via the detail view by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve your changes.




### Editing Via List View

You can edit contracts via the list view by clicking the Pencil icon to the left of each contract's name. A pop-up window will open with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve your changes.



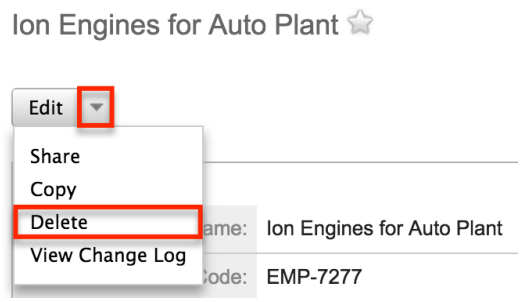

## Deleting Contracts

If a contract record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Contracts detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting contract records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.
Please note that your ability to delete contracts may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

### Deleting Via Detail View

Use the following steps to delete a contract record via the detail view:

1. Navigate to a contract record's detail view.
2. Select "Delete" from the Actions menu.

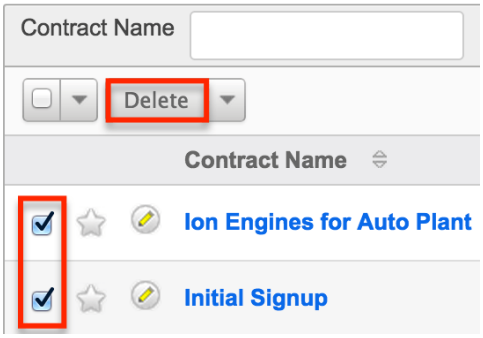



3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

### Mass Deleting Via List View

Use the following steps to delete one or more contract records via the list view:

1. Navigate to the Contracts list view by clicking the Contracts module tab.
2. Use the Basic or Advanced Search to find the contract records you wish to delete.
3. Select the desired contract records individually or using the checkbox dropdown's options.
4. Choose "Delete" from the Actions menu.




5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

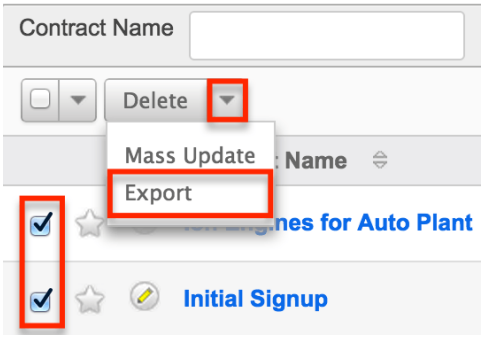
Due to PHP memory limitations on the server, there may be occasions when the application times out while deleting a large number of contract records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

## Exporting Contracts

Sugar's Export option allows users to download all fields for the selected contracts to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Contract data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered contracts back into Sugar. For more information on updating existing

records via import, please refer to the Import documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of contract records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Contracts may be exported from the Contracts list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for contracts and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.



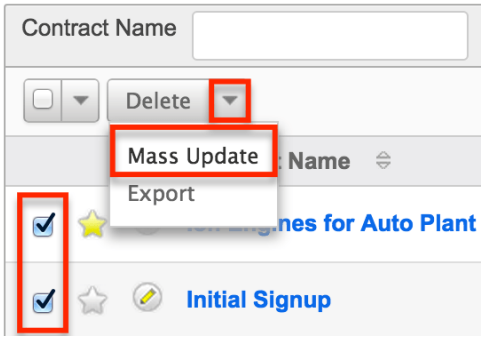

Please note that your ability to export contracts from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

## Mass Updating Contracts

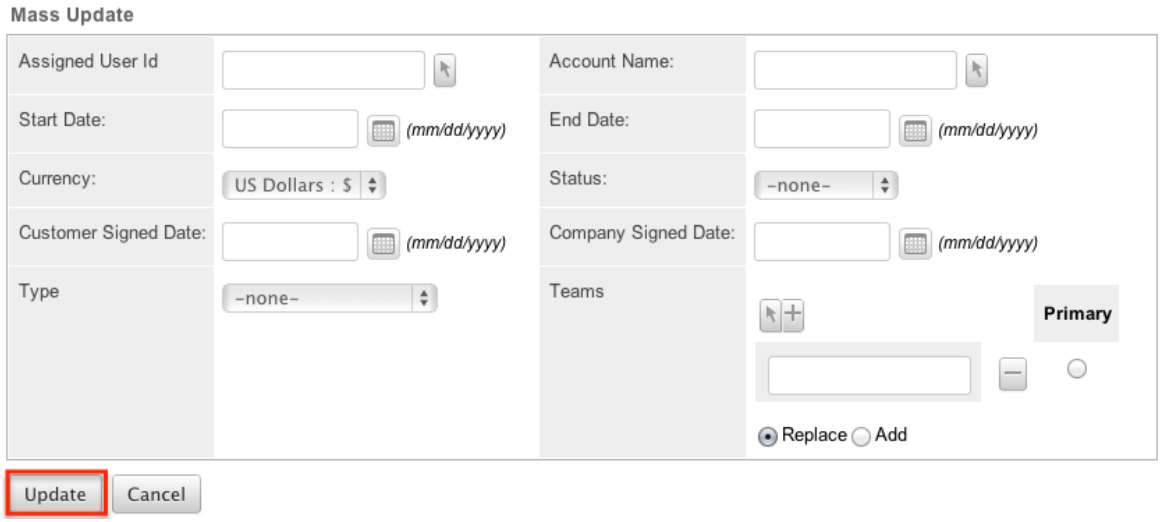
Mass Updating allows users to make the same change to multiple contract records at once from the Contracts list view. Users with administrator or developer access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide. Due to the PHP memory limitations on the server, there may be occasions when the application times out while mass updating a large number of contract records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Please note that your ability to mass update contracts may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.
Use the following steps to mass update contract records from the list view:

1. Navigate to the Contracts list view by clicking the Contracts module tab.
2. Use the list view's Basic or Advanced Search to find contracts you wish to modify.
3. Select the desired contracts individually or using the checkbox dropdown's options.
4. Choose "Mass Update" from the Actions menu.




5. Scroll to the Mass Update panel and set values for the fields you wish to alter. Note: For the Teams field, use "Replace" to remove existing team assignments before adding those specified here. Use "Add" to add the teams specified here to any existing team assignments.




6. Click "Update" to save the changes to all of the currently selected contract records.

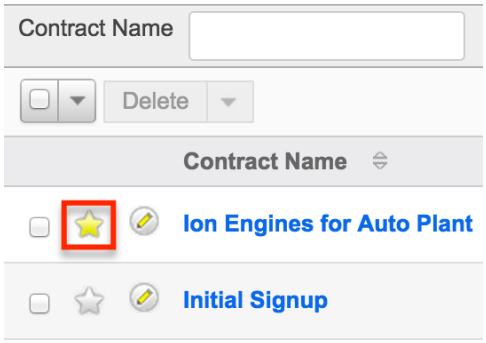
## Favoriting Contracts

Each Sugar user has the option to designate their own favorite contracts which are important or will be viewed often. Once records are marked as favorites, use the My Favorites checkbox in the Contracts Basic or Advanced Search to retrieve your favorites or select from your most recent favorites directly from the Contracts module tab .

## Favoriting Via List View

Use the following steps to mark records as favorites via the Contracts list view:

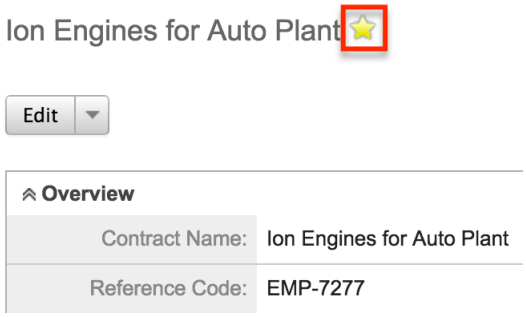
1. Navigate to the Contracts list view by clicking the Contracts module tab.
2. Use the Basic or Advanced Search to find the contract records you wish to mark as favorites.
3. Click the star icon on the left of each desired contract's row.
4. To remove the contract as a favorite, click the star again to revert it to white.




## Favoriting Via Detail View

Use the following steps to mark records as favorites via the Contracts detail view:

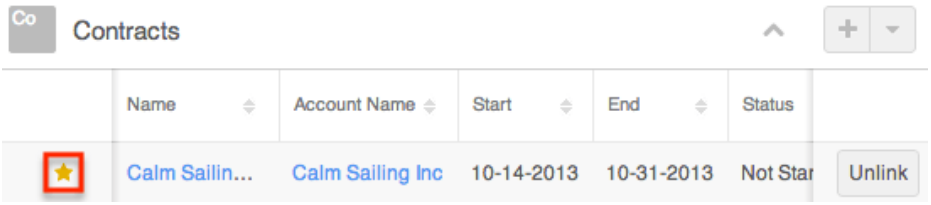
1. Navigate to a contract record's detail view.
2. Click the star icon to the right of the contract's name in the upper left of the detail view to designate it as a favorite.
3. To remove the contract as a favorite, click the star again to revert it to white.




## Favoriting Via Subpanel

Use the following steps to mark contract records as favorites via the subpanel in related modules:

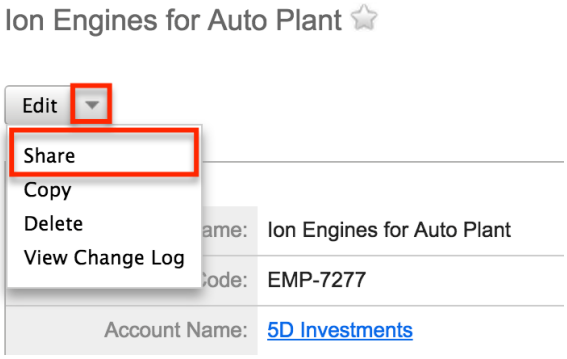
1. Navigate to a related module's record view (e.g. Contacts).
2. Click the star icon to the left of the desired record's row in the Contracts subpanel.




3. To remove the contract as a favorite, click the star again to revert it to gray.

## Sharing Contracts

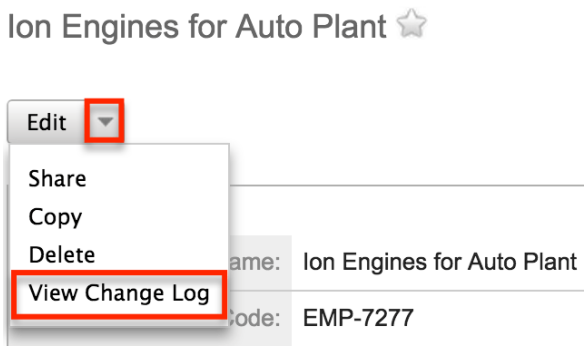
Individual Contract records can be shared with other users in your organization by sending an email with the record's link directly from the detail view. In the contract's detail view, select "Share" from the Actions menu which will open a Compose Email window including the URL of the account record. Enter the recipient(s) email address in the To field then click "Send".




Users can simply click the link in the email to access the contract record in Sugar. Please note that the user must be logged into Sugar in order to access the record. Users will only be able to view the shared record as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

## Viewing Contract Change Logs

Changes made to each contract record are tracked over time, and users are able to view the history of changes via the change log in each contract's detail view. To view the change log, navigate to a contract in detail view and select "View Change Log" from the Actions menu. Please note that only fields marked as "Audit" in Admin > Studio will be displayed in the change log. For more information on designating for audit, please refer to the Studio documentation in the Administration guide.




Last Modified: 10/28/2015 02:56pm

# Documents

## Overview

Sugar's Documents module gives your users a way to access and update company-specific files. These files can range from internal policies to customer-distributed content. There are various ways you can create documents in Sugar such as via the Documents module and via the quick create menu. Once the document record is created, you can view and edit information pertaining to the document via the Documents detail view. Each document record may then relate to other Sugar records such as accounts, cases, opportunities, and many others. This documentation will cover how to use the Documents module as well as the various actions and options available from within the module.

## Document Fields

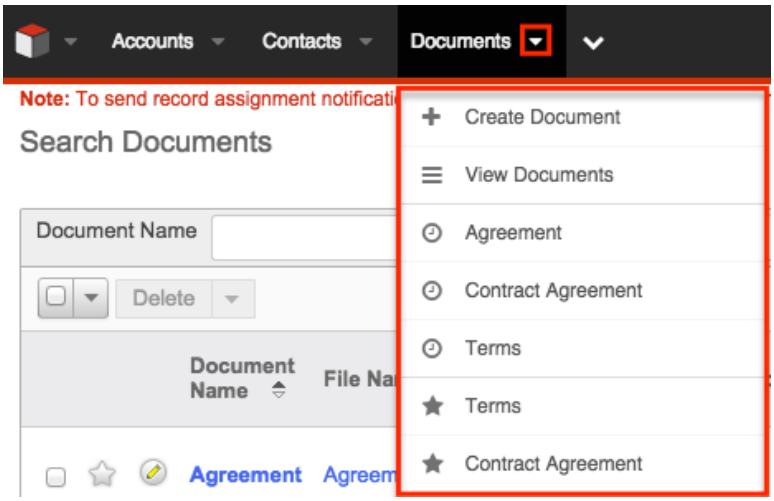
The Documents module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

| Field | Description |
|---|---|
| Assigned To | The Sugar user assigned to the document |
| Category | Primary category for locating documents |
| Description | A description or other information about |

| | |
|---|---|
| | the document |
| Document Name | The name or designation of the Document (Defaults to the filename of the Document) |
| Document Type | The type of the Document (e.g. NDA, Mail Merge, License Agreement, etc.) |
| Expiration Date | The date the Document expires |
| File Name | Click "Choose File" to navigate to the location to upload a Document |
| Publish Date | The date the Document is published (Defaults to today) |
| Related Document | A Document record that is related to this Document |
| Related Document Revision | The Related Document's current revision |
| Revision | The most recent revision number for the Document<br>Note: The Revision field becomes read-only after the initial save. |
| Source | Where the Document is stored (i.e Sugar, Google, IBM SmartCloud, etc.) |
| Status | The current status of the document (e.g. Active, Draft, Expired, etc.) |
| Sub Category | Secondary category for locating documents |
| Teams | The Sugar team(s) assigned to the document record |
| Template | Classifies a Document as a template or not |

## Documents Module Tab

The Documents module tab is typically found by clicking the arrow to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Documents" to access the list view. Once the Documents tab displays on the navigation bar, you can click the triangle within the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed Menu displays the list of documents you last viewed in the module. The Favorites Menu displays the list of documents you most recently marked as favorites in the module.




The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|---|---|
| Create Document | Opens the edit view layout to create a new document |
| View Documents | Opens the list view layout to search and display documents |

If you do not see the Documents module tab in Sugar, please check the following:

- The Documents module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Documents module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Documents module for your entire Sugar instance. Reach out to your Sugar administrator to have the Documents module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

## Creating Documents

There are various methods for creating documents in Sugar including via the Documents module, quick create, and via duplication. The full edit view layout opens when creating the document directly from the Documents menu and

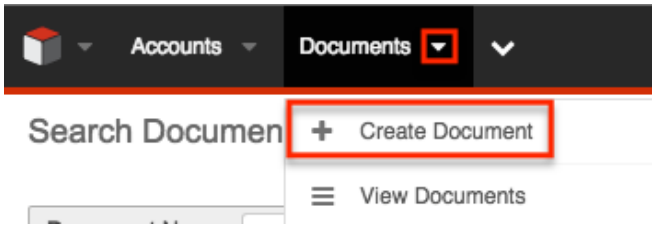
includes all of the relevant fields for your organization's documents. The Edit View layout can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

## Creating Via Documents Module

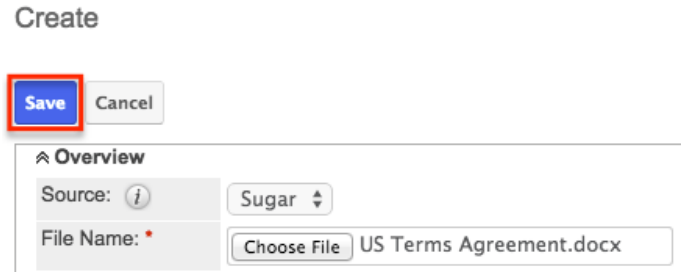
You can create a library of documents and graphics that you can share with other users and contacts, ranging from marketing collateral to contracts. You can also create templates for frequently used documents. One of the most common methods of document creation is via the Create Document option in the Documents module tab. This opens up the edit view layout which allows you to enter in all the relevant information for the document.

Use the following steps to create a document via the Documents module:

1. Click the triangle in the Documents module tab to open the actions menu and select "Create Document".




2. Enter appropriate values for the fields in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".

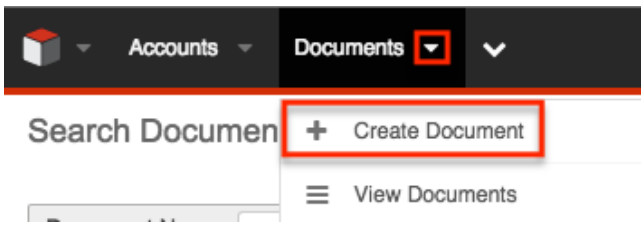



## Creating Via Google Docs

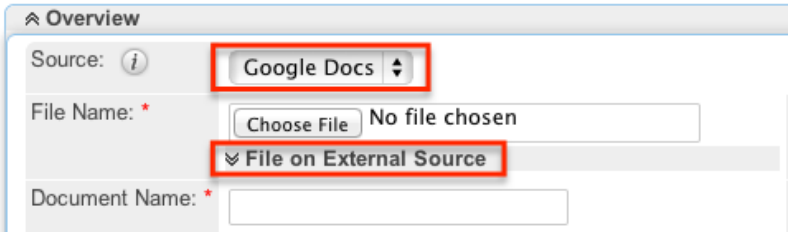
Sugar has the ability to create documents in the system that are linked to external sources, the most popular of these is Google Docs or Google Drive.

Use the following steps to create a document linked to Google Docs via the Documents module:

1. Click the triangle in the Documents module tab to open the actions menu and select "Create Document".




2. Select "Google Docs" from the Source dropdown to reveal the External Source selector.



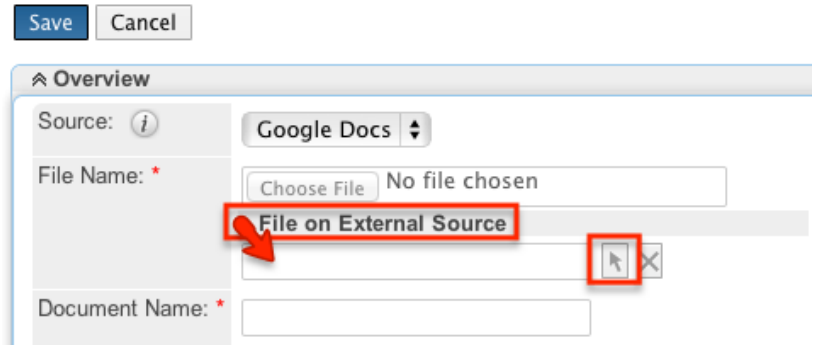

Note: If Google Docs is not an option in the Source dropdown, then you most likely need to connect your Sugar account to your Google Id through your user profile. For more information on how to connect to your Google Id in Sugar, please refer to the Google Docs Integration section in this documentation.

3. Click "Choose File" to navigate to a file on your local computer. The selected file will be uploaded to Google Docs. Not all file extensions are currently supported for uploading to Google Docs.
The following file extensions are currently allowed:

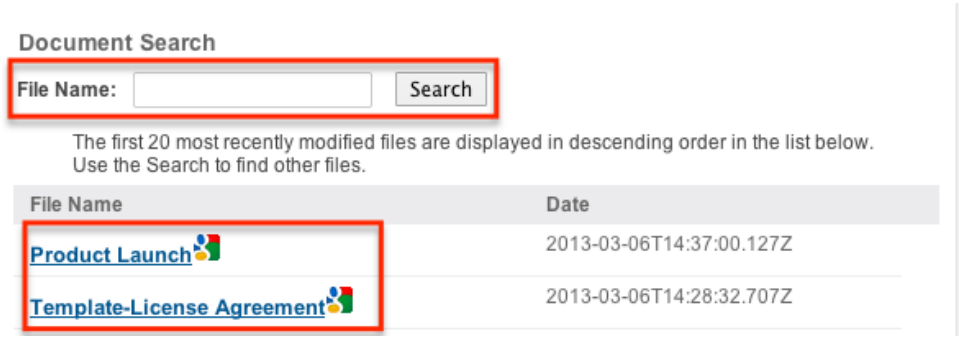
| File | Description |
|---|---|
| CSV | Comma Separated Values |
| DOC | Microsoft Word 97-2004 |
| DOCX | Microsoft Word |
| HTML | Web Text File |
| HTM | Web Text File |
| JPG | Image File |
| ODS | OpenDocument Spreadsheet |
| ODT | OpenDocument Text |
| PDF | Portable Document Format |
| PNG | Image File |
| PPT | Microsoft PowerPoint Presentation |
| PPS | Microsoft PowerPoint Slideshow |
| RTF | Rich Text Format |

| | |
|---|---|
| SXW | OpenOffice.org XML |
| TAB | Tab Separated Values |
| TXT | Plain Text |
| TEXT | Plain Text |
| TSV | Tab Separated Values |
| XLS | Microsoft Excel 97-2004 Workbook |
| XLSX | Microsoft Excel Workbook |

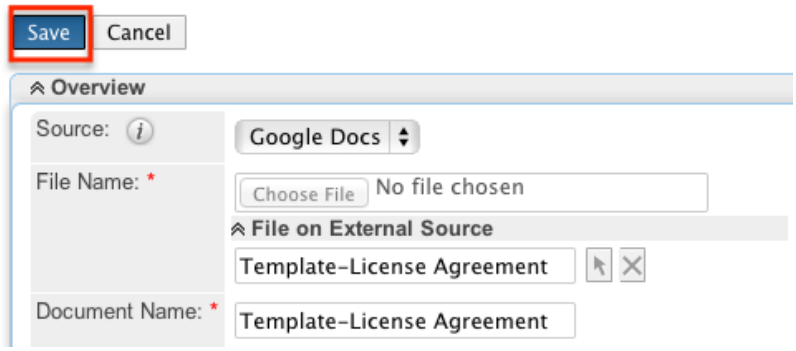
Alternatively click "File on External Source" to reveal the external source selector.




Click the arrow button to launch the selector. This window will show the 20 most recently modified documents in your Google Drive.
Note: This will only show documents owned by you in your Google Drive, and will show documents through all folders in your drive.
Use the Search box to find a specific document. Select a document by clicking on the document's file name.




Enter appropriate values for the remaining fields in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
Once the necessary information is entered, click "Save".

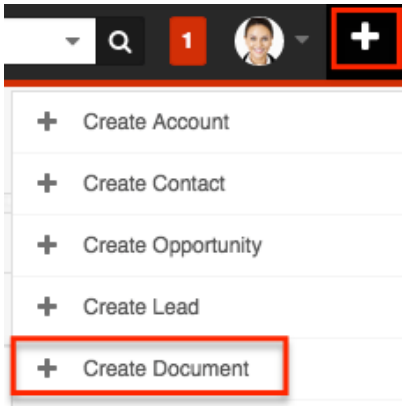


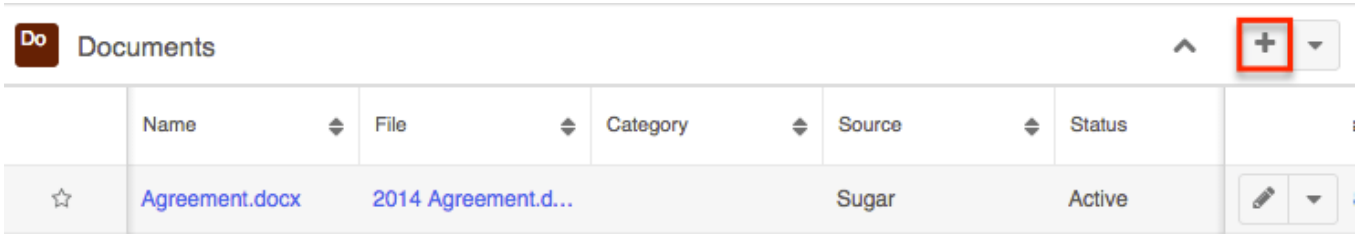

Note: Documents that link to an external account (e.g. Google Docs, IBM Smart Cloud) cannot be used as attachments in emails composed through the Sugar Email Client.

## Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also quick create a document from any Documents subpanel on related module records.

Use the following steps to create a document via Quick Create:

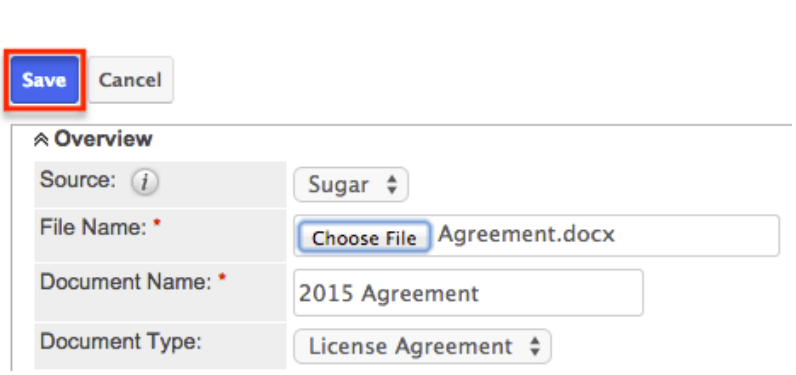
1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Document". You can also click the Plus button on any Documents subpanel on a related module's record view (for Sidecar modules) or select "Create" on any Documents subpanel on a related module's detail view (for Legacy modules).
   From Quick Create menu:
   
   
   From Documents subpanel (for Sidecar modules):




From Documents subpanel (for Legacy modules):




2. Enter appropriate values in the fields in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
3. If creating the document via the Documents subpanel in a Legacy module and additional fields are desired, click the Full Form button to use edit view instead.
4. Once the necessary information is entered, click "Save".




## Creating Via Duplication

You can also create a new document by duplicating an existing document record. The Copy option is useful if the document you are creating has similar information to an existing document. Related records on the original document will not be related to the newly created document, but the last revision of the original document will copy over to the new document with the change log contents: "Document Created".

Use the following steps to create a document by duplicating an existing record:

1. Navigate to a document record's detail view.
2. Click the Actions menu and select "Copy".




3. The displayed edit view is pre-populated with the original document's values. Update the necessary fields, then click "Save".




Note: The Source and File Name fields can not be modified when duplicating a document.

## Viewing Documents

There are various options available for viewing document records in Sugar including via Documents list view, Documents detail view, Documents Recently Viewed menu, dashlets, and reports. Please note that you will only be able to see document records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

### Viewing Via List View

The Documents list view displays all document records meeting the current search criteria. To access the list view, simply click the documents module tab. While list view shows key document fields, you can click the document's name to open the record in detail view. For more information on viewing documents via list view, please refer to the Documents List View section of this documentation.

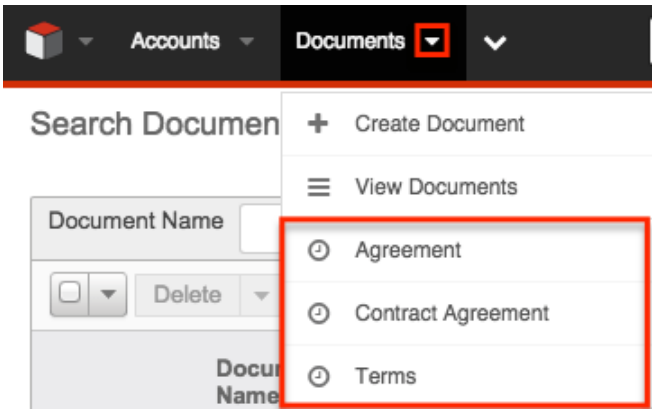
### Viewing Via Detail View

The Documents detail view displays thorough document information including all document fields followed by subpanels of the document's related records belonging to various modules. The detail view can be reached by clicking a

document record's link from anywhere in the application including from the Documents list view. For more information on viewing documents via detail view, please refer to the Documents Detail View section of this documentation.

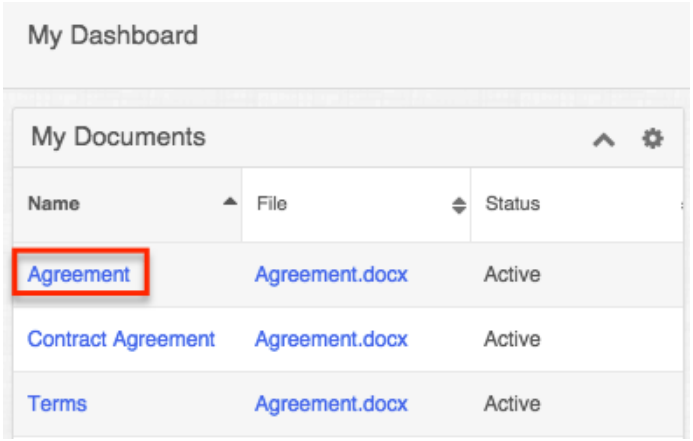
## Viewing Via Recently Viewed

As you work, Sugar will keep track of which documents you have recently viewed. Click the Actions menu in the Documents module tab to see a list of your most recently viewed documents, and click each name to open the document in detail view.



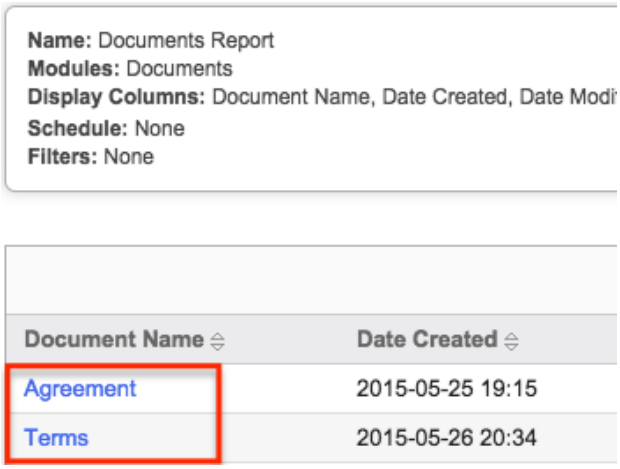

## Viewing Via Dashlets

Sugar Dashlets allow users to get a quick view of various records, activities, reports, etc. Dashlets may be added to a user's Home page or to the intelligence pane for Sidecar modules (e.g. Accounts, Contacts, etc.).You can view document information in document-based dashlets such as "My Documents". Clicking a document's name from any dashlet will open the document in detail view. For more information on using dashlets and viewing document records via dashlets, please refer to the Intelligence Pane documentation.



### Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding documents and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the document record's detail view by clicking the document's name in the report results. Please note that you can only directly access document detail views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation.




Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

## Searching Documents

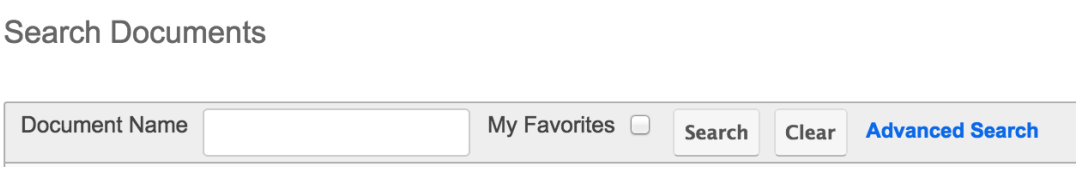
The Documents list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Documents list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %agreement). This will pull up any record that has the word "agreement" in the name, regardless of how it starts or ends.
For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

## Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.

The buttons and checkboxes available in Basic Search panel have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Favorites : Select this box to return only records you have marked as favorites.



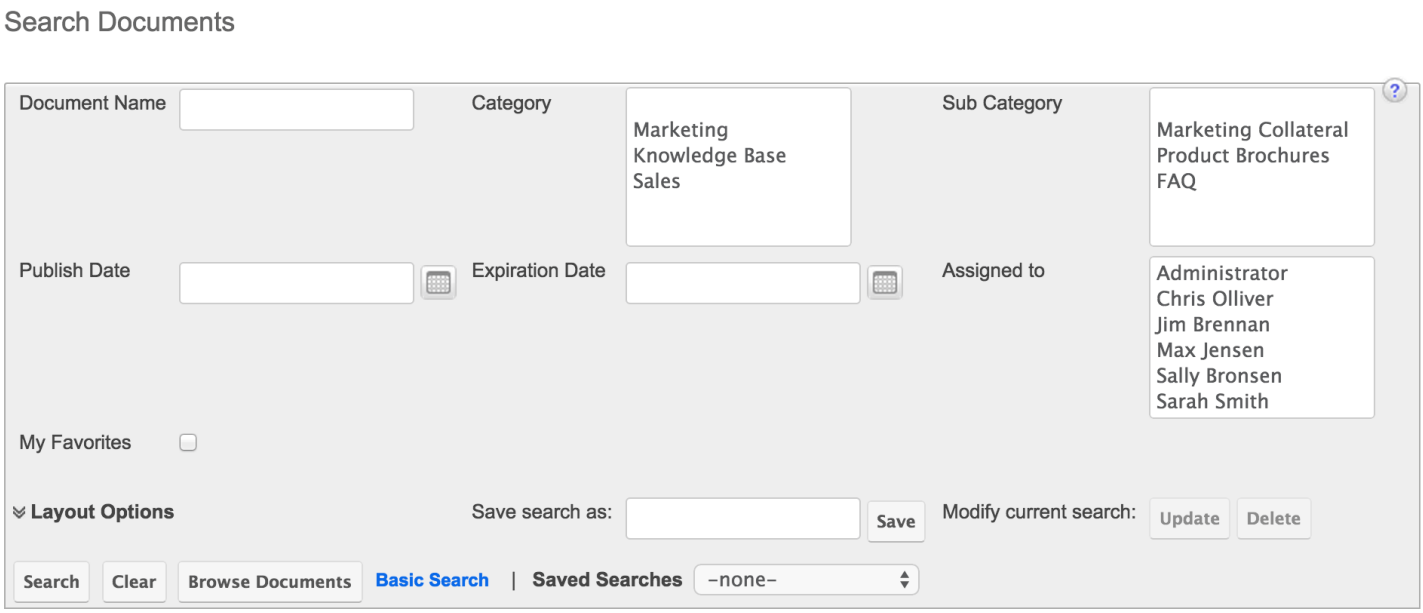

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Favorites" and enter a document name, Sugar will only return document records with a matching name that you have marked as favorites. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all document records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see document records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentations in the Administration guide.
Administrators can configure what fields appear on the Documents Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Advanced Search

Advanced Search offers a more in-depth search experience than Basic Search including additional fields, layout options, and saved search capability. From the Advanced search panel, you can click "Basic Search" for simplified searching.

The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Favorites : Select this box to return only records you have marked as favorites.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the Layout Options section of the Search documentation.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section of the Search documentation.

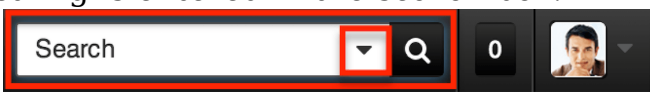



When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select "My Favorites" and enter in a document name to search, Sugar will only return document records with a matching name that you have marked as favorites. When searching by a multiselect or dropdown field (e.g. "Assigned to"), however, Sugar will return records matching any of these selections. Once the search completes, the relevant results will populate in the list view below the search panel. To see all document records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see document records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

Administrators can configure what fields appear on the Documents Advanced Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search may be used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.




To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the Search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

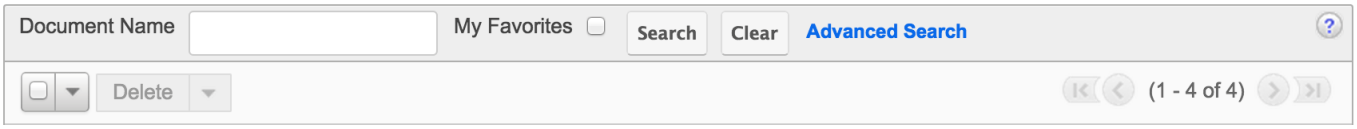
# Documents List View

The Documents list view displays all document records meeting the current search criteria and to which your user has access. You can view the basic details of each document within the field columns. Please note that you will only be able to see document records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

You have the option to change what fields are displayed in list view by configuring your layout options in the Documents Advanced Search. For more information on configuring your list view, please refer to the Layout Options section of the Search documentation. Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Pagination

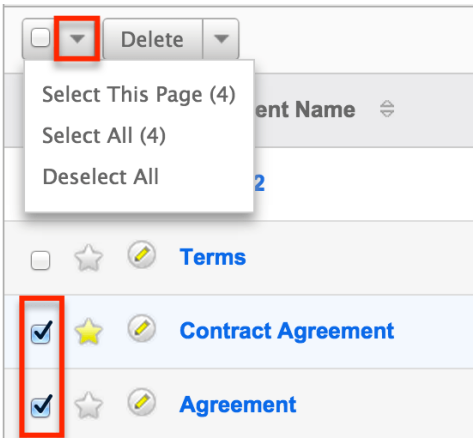
List view displays the current search results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. To the right just below the search panel you can see which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of your current results.
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.




## Checkbox Selection

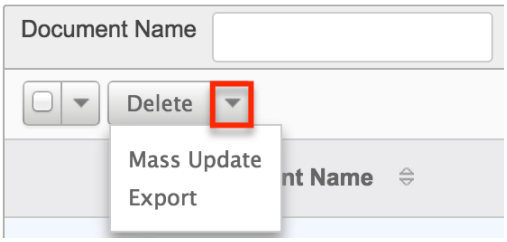
You can perform several actions on document records directly from the list view by first selecting the desired records. To select individual document records on the Documents list view, mark the checkbox on the left of each row. To select or deselect multiple document records on the list view, use the options in the checkbox dropdown menu:

- Select This Page : Selects all records shown on the current page of document results.
- Select All : Selects all records in the current search results across all pages of document results.
- Deselect All : Deselects all records that are currently selected.



## Mass Actions Menu

The Mass Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.

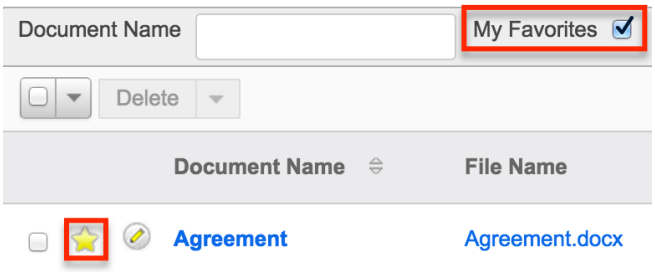



The options in the Mass Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Delete | Delete one or more documents at a time |
| Mass Update | Mass update one or more documents at a time |
| Export | Export one or more documents to a CSV file |

## Favorite Designation

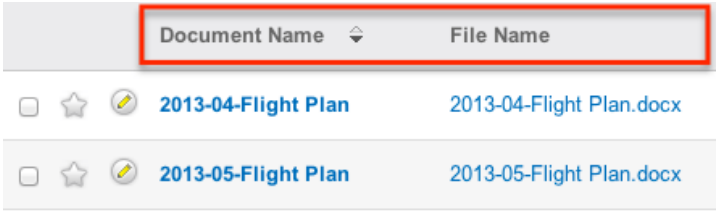
Users have the option to mark document records as favorites via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Documents module tab. In the Documents list view, the star on the left of each document's row is yellow once marked to indicate a favorite document. For more information on how to mark records as favorites, please refer to the Favoriting Documents section of this documentation.




## Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the

sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time. You can also set a default order-by column using the layout options in Advanced Search. For more information on setting a default column sort, please refer to the Layout Options section of the Search documentation.




## Documents Detail View

The Documents detail view displays thorough document information including all document fields which are grouped by default into the Overview and Revision Details panels. You can also view a document's related records (Document Revisions, Related Contracts, Accounts, etc.) which appear in subpanels beneath the document fields. The detail view can be reached by clicking a document record's link from anywhere in the application including from the Documents list view.
Please note that you will only be able to view a document record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

### Actions Menu

The Actions menu on the top left of each document's detail view allows you to perform various actions on the current record. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the System documentation in the Administration guide.

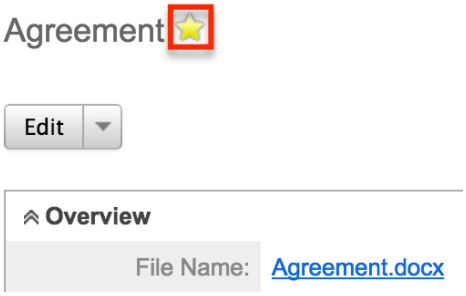


The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
| --- | --- |
| Edit | Edit this document |
| Copy | Duplicate this document |
| Delete | Delete this document |

## Favorite Designation

Users have the option to mark document records as a favorite via the detail view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Documents module tab. In the Documents detail view, the star on the right of the document's name is yellow once marked to indicate a favorite document. For more information on how to mark records as favorites, please refer to the Favoriting Documents section of this documentation.




## Next or Previous Record

On the upper right of the Documents detail view, there are two buttons that allow you to page through each document in the Documents list view's current search results. Clicking the Previous button displays the previous document of the current search results while clicking the Next button displays the next document of the current search results. The text in between shows which document result you are currently viewing within the total number of current results.




## Subpanels

Beneath a document record's fields are subpanels containing related records from various modules as well as the document revision history.

## Related Records Subpanels

The most common type of subpanels displayed on a document's detail view contains the document's related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. For example, a document may be related to only one other document but related to multiple accounts. This means that the related document will be displayed amongst the document's fields while accounts will be displayed in a subpanel beneath the fields.

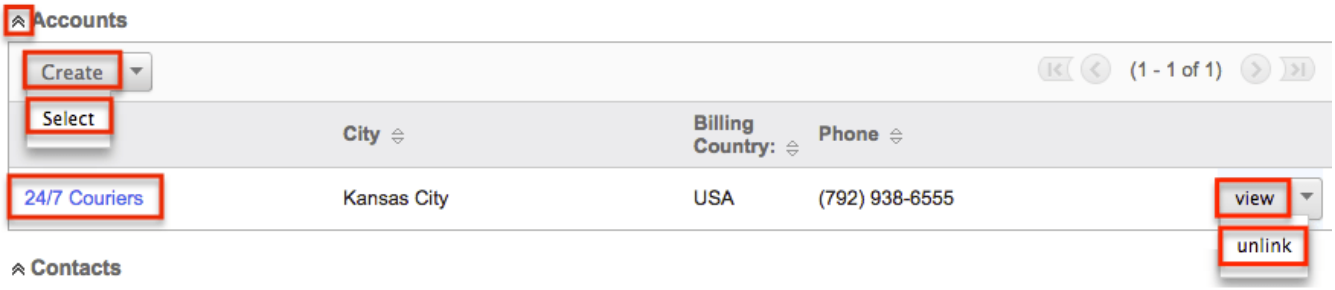
Users with administrator or developer access have the ability to change the fields (e.g. Name, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information modifying subpanels, please refer to the Studio documentation in the Administration guide.

Related record subpanels allow the following operations to be performed. Please note that administrators in Sugar can change the subpanel's Action menu to be displayed as separate buttons instead of a dropdown via Admin > System Settings. For more information, please refer to the System documentation in the Administration guide.

- To view the details of a related record, click the record's name in the subpanel or choose "View" from the Actions menu on the far right of the record's row to open it in record view.
- To relate an existing record to the document, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the document, choose "Create" from the subpanel's Action menu, then complete the record view layout and click "Save".
- To delete the document's relationship to a record, choose "unlink" from the Actions menu on the far right of a record's row. This removes the relationship, but does not delete the record itself.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

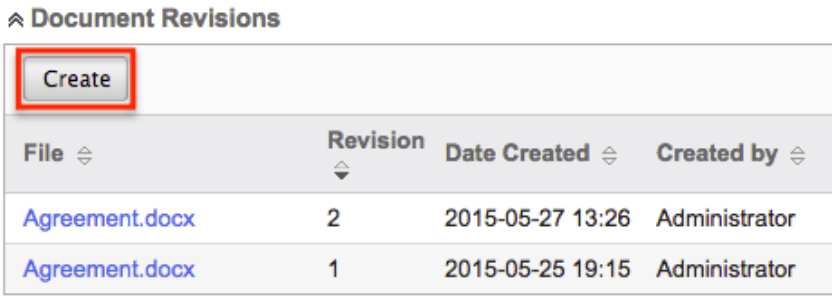
Please note that administrators can prevent users from moving subpanels to different locations in the detail view. For more information on preventing rearranging of subpanels, please refer to the System documentation in the Administration guide. Check with your system administrator if you are not able to

rearrange your subpanels.




Document Revisions Subpanel

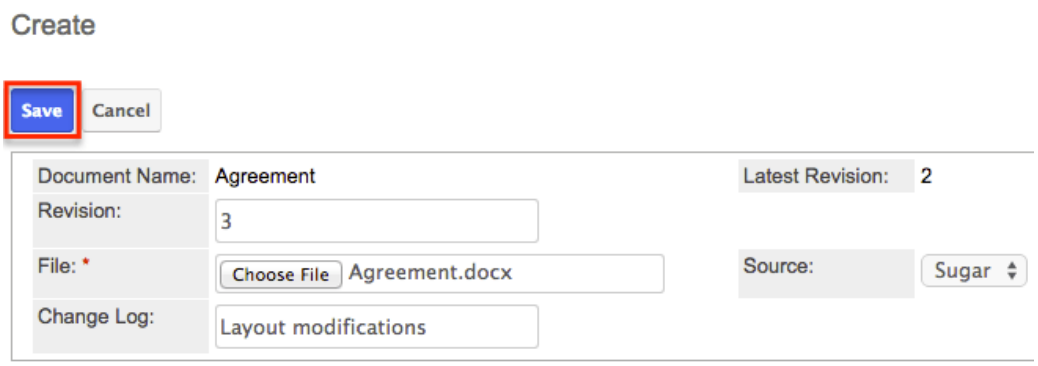
The Document Revisions subpanel lists the document revisions for this document record. The revisions are sorted in descending order on the revision number by default. Each revision retains the copy of the document loaded on that revision. This provides you with the ability to look back at the history of the document to compare revisions.




Note: This does not work as expected with External Documents (e.g. Google Docs, IBM Smart Cloud) as the document is not stored in Sugar for these document sources, but only a link to the document. To retain change history, either utilize Google Doc's change features, or select a different document for every revision.

You can click the Create button on this subpanel to create a new revision of the document you are currently viewing. The revision number is automatically populated with the current highest revision number plus one, but can be modified. However, once the new Document is saved, this field becomes read-only for all users.

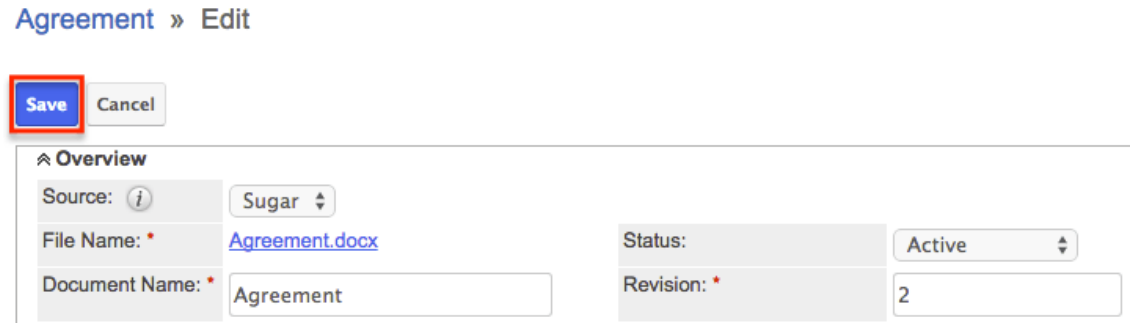
Note: If you skip numbers, it will not go back and fill in the missing numbers.




You may also populate the Change Log field with a short description of the change being made for this revision. Click "Save" to complete the revision record.

## Editing Documents

Documents may be edited at any time to update or add information to the record. You can make changes to existing document records via the Documents edit view. Edit view is available within the Documents module and includes all of the Document fields you should need.

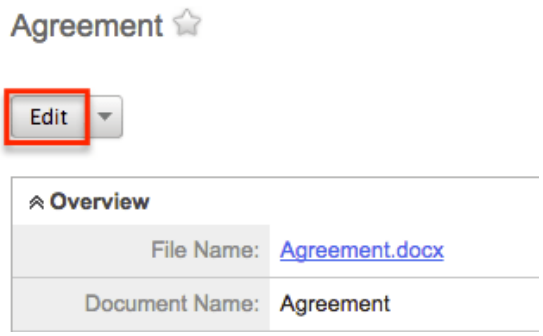



Please note that your ability to edit documents in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure the Documents edit view via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

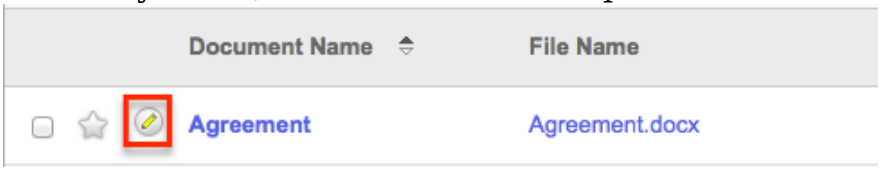
### Editing Via Detail View

You can edit documents via the Detail View by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve the changes made.




### Editing Via List View

You can edit documents via the List View by clicking the Pencil icon to the left of each document's name. The edit view layout will open and you can update the necessary fields, then click "Save" to preserve the changes.




## Deleting Documents

If a document record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Documents detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting document records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records. Document revision records will be deleted when deleting the parent document record. Please note that your ability to delete documents in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

### Deleting Via Detail View

Use the following steps to delete a document record via the detail view:

1. Navigate to a document record's detail view.
2. Select "Delete" from the Actions menu.

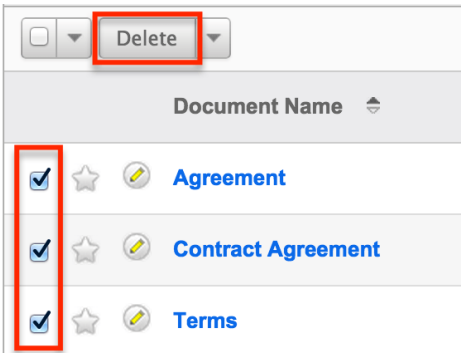



3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

### Deleting Via List View

Use the following steps to delete one or more document records via the list view:

1. Navigate to the Documents list view by clicking the Documents module tab.
2. Use the Basic or Advanced Search to find the Document records you wish to delete.
3. Select the desired document records individually or using the checkbox dropdown's options.
4. Choose "Delete" from the Actions menu.




5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

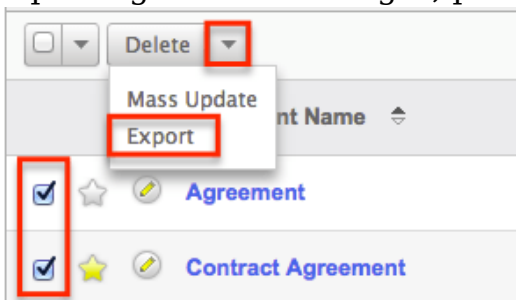
Due to PHP memory limitations on the server, there may be occasions when the application times out while deleting a large number of document records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

## Exporting Documents

Sugar's Export option allows users to download all fields for the selected documents to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use document data with other software such as Microsoft Excel. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of

document records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Documents may be exported from the Documents list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for documents and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.

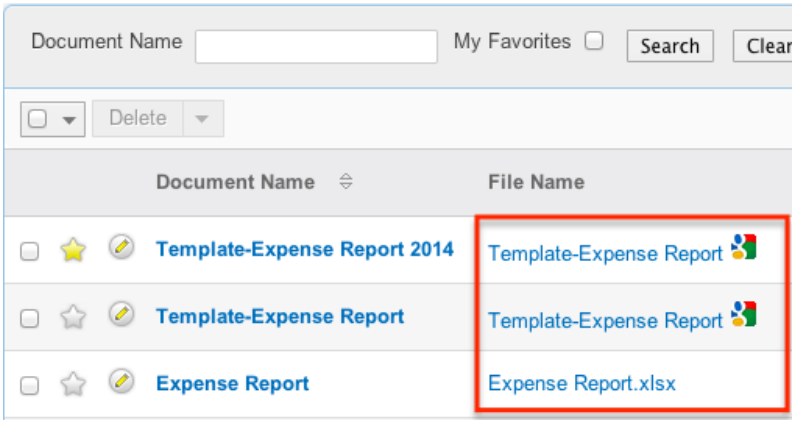



Please note that your ability to export documents from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

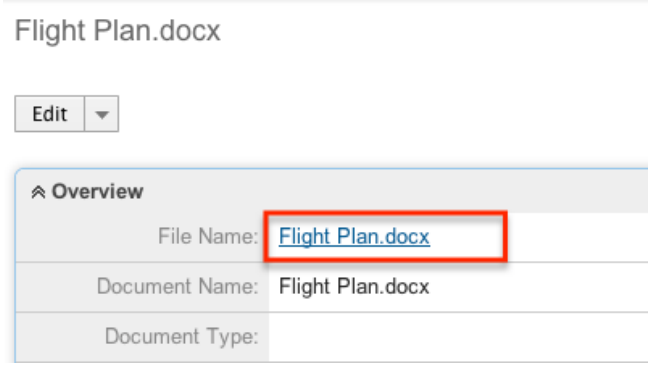
## Downloading Documents

Exporting a document from Sugar will only export the document record with the metadata about the document, but the document itself will not be included in the export. In order to download a document from the documents module, simply click on the File Name link in the list view or the detail view and the document will be downloaded to your computer. If the document is linked to an external source (e.g. Google Docs, IBM Smart Cloud), then the file name link will open directly to the doc inside a new window or tab.

From Documents list view:




From Documents detail view:

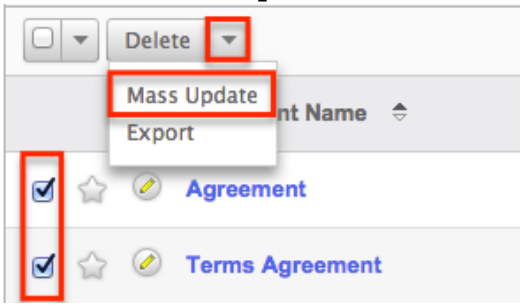



## Mass Updating Documents

Mass Updating allows users to make the same change to multiple document records at once from the Documents list view. Users with administrator or developer level access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide. Due to the PHP memory limitations on the server, there may be occasions when the application times out while mass updating a large number of document records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

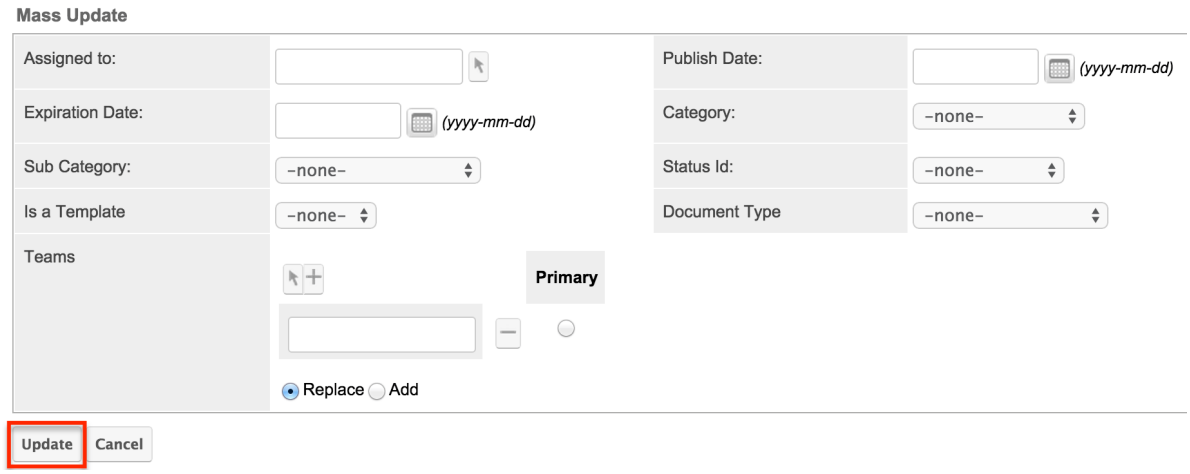
Please note that your ability to mass update documents may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.
Use the following steps to mass update document records from the list view:

1. Navigate to the Documents list view by clicking the Documents module tab.
2. Use the list view's Basic or Advanced Search to identify documents you wish to modify.
3. Select the desired documents individually or using the checkbox dropdown's options.
4. Choose "Mass Update" from the Actions menu.




5. Scroll to the Mass Update panel and set values for the fields you wish to alter.

Note: For the Teams field, use "Replace" to remove existing team assignments before adding those specified here. Use "Add" to add the teams specified here to any existing team assignments.




6. Click "Update" to save the changes to all of the currently selected document records.

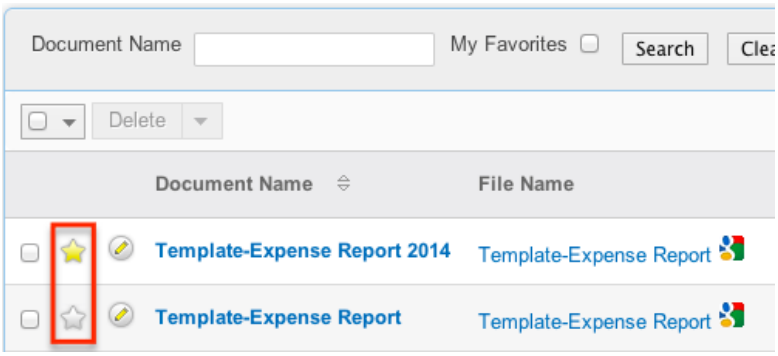
## Favoriting Documents

Each Sugar user has the option to designate their own favorite documents which are important or will be viewed often so that they can easily be accessed via search or from the documents module tab. Once records are marked as favorites, use the My Favorites checkbox in the Documents Basic or Advanced Search to retrieve your favorites or select from your most recent favorites directly from the Documents Module Tab .

### Favoriting Via List View

Use the following steps to mark records as favorites via the Documents list view:

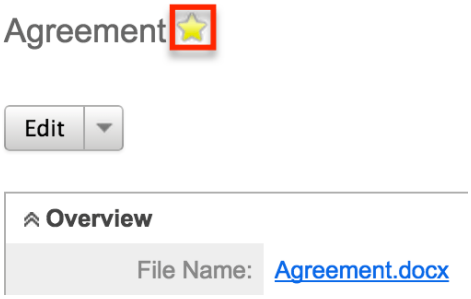
1. Navigate to the Documents list view by clicking the Documents module tab.
2. Use the Basic or Advanced Search to find the Document records you wish to mark as favorites.
3. Mark the star icon on the left of each desired document's row.
4. To remove the document as a favorite, click the star again to revert it to white.




## Favoriting Via Detail View

Use the following steps to mark records as favorites via the Documents detail view:

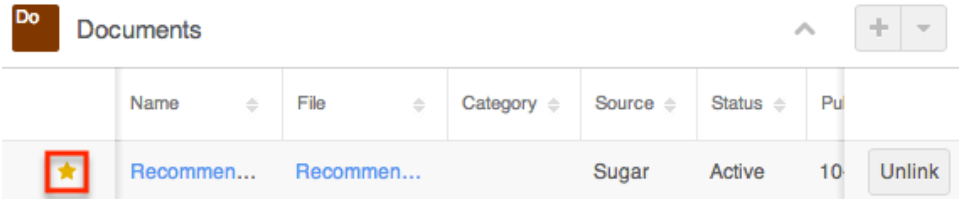
1. Navigate to a document record's detail view.
2. Click the star icon to the right of the document's name in the upper left of the detail view to designate it as a favorite.
3. To remove the document as a favorite, click the star again to revert it to white.




## Favoriting Via Subpanel

Use the following steps to mark document records as favorites via the subpanel in related modules:

1. Navigate to a related module's record view.
2. Click the star icon to the left of the desired record's row in the Documents subpanel.




3. To remove the document as a favorite, click the star again to revert it to gray.

## Google Docs Integration

Sugar comes with Google Docs (Google Drive) integration by default. In order to be able to create a document in Sugar from a Google Doc in your Google Drive you will first need to link your Google Account with your profile in sugar. For more information regarding setting up external accounts in your user profile, please refer to the External Accounts Tab section in the Getting Started documentation.

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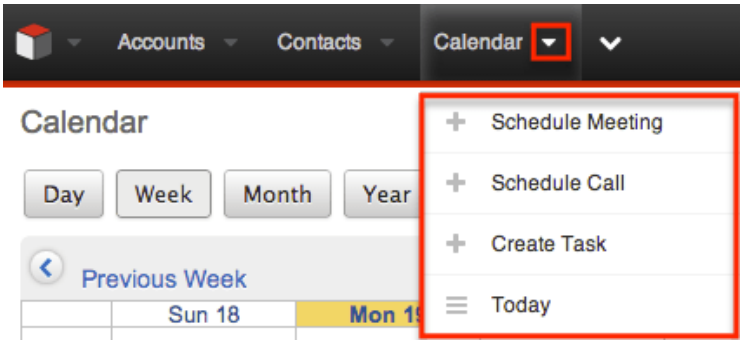
# Calendar

## Overview

Sugar's Calendar module allows users to easily schedule, view, and manage their activities (e.g. calls, meetings, tasks) in one place. The calendar will show your calls, meetings, and tasks provided you are an invitee on the call or meeting, or the task is assigned to you. You can also view other user's scheduled activities via the shared calendar option. This documentation will cover how to use the Calendar module as well as the various actions and options available from within the module.

## Calendar Module Tab

The Calendar module tab is typically found by clicking the arrow to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Calendar" to access your calendar. Once the Calendar Lists tab displays on the navigation bar, you can click the triangle within the tab to display the Actions menu, which allows you to perform important actions within the module.



The Actions menu allows you to perform the following options:

| Menu Item | Description |
|---|---|
| Schedule Meeting | Schedule a new meeting via the Meetings record view |
| Schedule Call | Schedule a new call via the Calls record view |
| Create Task | Create a new task via the Tasks record view |
| Today | View the current day on the calendar |

## Calendar Actions

When viewing your calendar, there are several options across the top of the calendar to help you navigate the calendar and increase the functionality available. These buttons are accessible from any calendar screen, with some notable exceptions. Most of the buttons are used to change the view of the calendar to show a specific time period, or jump to a specific period.

The buttons are defined as follows:

| Options | Description |
|---|---|
| Day | View the current day on the calendar |
| Week | View the current week on the calendar |
| Month | View the current month on the calendar |
| Year | View the current year on the calendar |
| Shared | View the shared calendar for other users in Sugar |
| User List | Select which users will show on the shared calendar<br>Note: This option is only available when viewing the Shared calendar |
| Calendar Icon | Click the calendar icon to quickly jump to a specific date<br>Note: This option is not available when using the year view |
| Settings | Change the settings on the calendar as described in Viewing Via Calendar |

# Creating Activities

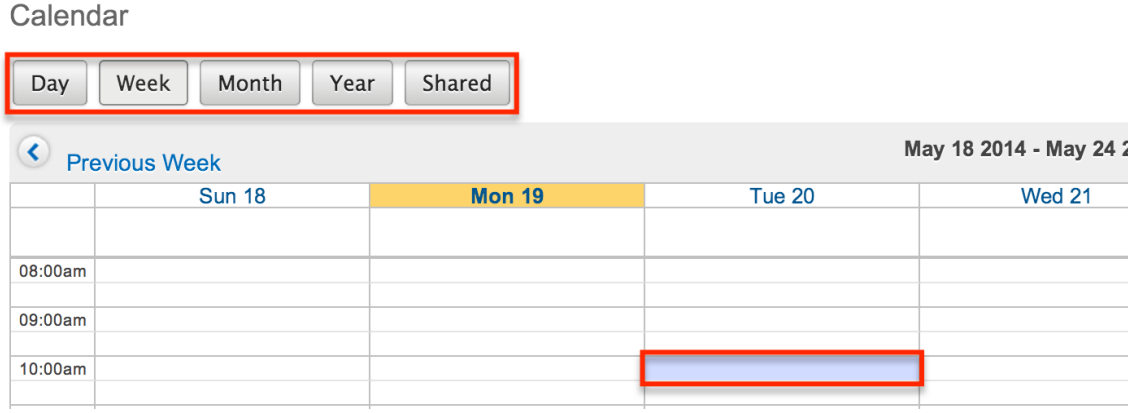
There are various methods for creating the different activities available in Sugar, including via the calendar itself, the Calendar module's actions menu, the individual activity's module, or via quick create. The record view opens in edit mode when creating the call directly from the Calls menu, Quick Create menu, and Calendar module and includes all of the relevant fields for your organization. When using quick create to make a call while viewing an existing record of another module, Sugar automatically creates a relationship between both records. For example, if you are viewing a contact record (e.g. John Smith) and create a new call via its record view, the Related To field in the call record will automatically populate with "John Smith", thus creating the relationship and adding him as an invitee. The record view layout can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

## Creating Via Calendar Grid

The calendar allows you to create meetings and calls easily by clicking on the cell corresponding to the specific date and time you wish to schedule the activity. The record view will appear in edit mode, and the start date and time will automatically be populated based on the date and time cell you selected in the calendar.

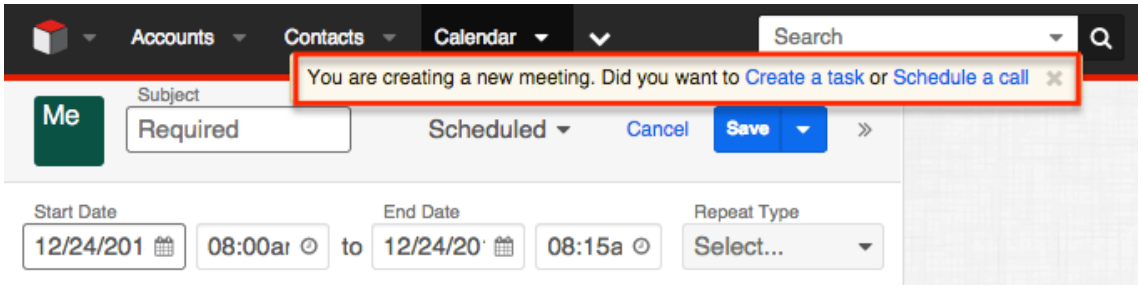
Use the following steps to create an activity (e.g. meeting) via the calendar grid:

1. Click the Calendar module tab.
2. On the calendar view, click the cell corresponding to the date and time you wish to schedule the meeting. You can choose to view the calendar by Day, Week, Month, Year, or Shared. For more information on viewing the shared calendar, please refer to the Viewing Shared Calendar section of this documentation.




When a cell is selected on the calendar, a Meeting record view will appear in edit mode. A popup will also appear giving users to option to create a new call

or a new task instead.



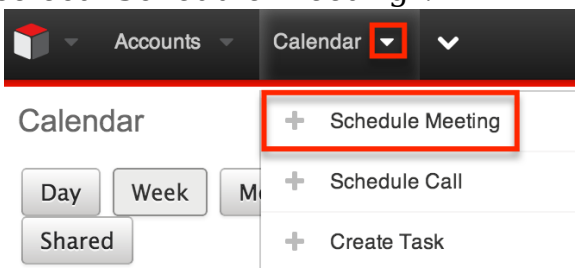

3. Refer to step 2 and beyond in Creating Via Meetings Module section of the Meetings documentation for additional instructions about creating meeting records.

## Creating Via Actions Menu

Activities can also be created via the create options (e.g. Schedule Meeting, Schedule Call, etc.) in the Calendar module tab. This opens up the record view in edit mode for the corresponding module (e.g. Calls, Meetings, etc.) which allows you to enter in all the relevant information for the activity.

The following steps cover creating a new meeting via the Calendar module tab as an example:

1. Click the triangle in the Calendar module tab to open the actions menu and select "Schedule Meeting".




2. Refer to step 2 and beyond in Creating Via Meetings Module section of the Meetings documentation for additional instructions about creating meeting records.

## Creating Via Activities Modules

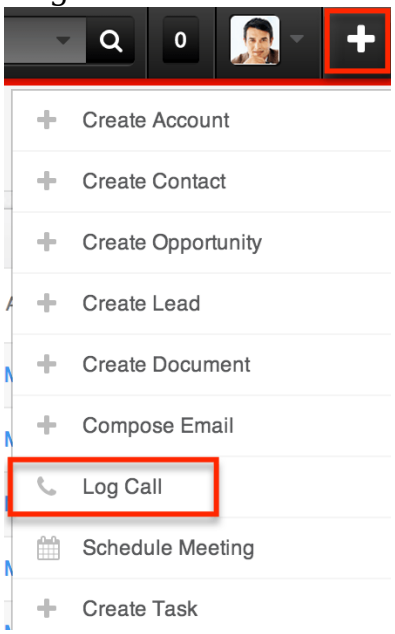
Calls, meetings, and tasks can also be created directly from their individual modules. The activity will then show on your calendar if you are listed as an invitee on the call or meeting or if you are the assigned user on the task. For instructions for creating activities directly from their modules, please refer to the Calls, Meetings, or Tasks documentation.

## Creating Via Quick Create

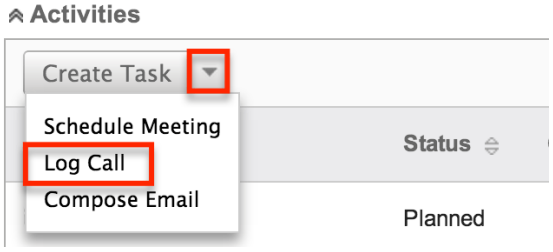
The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also quick create an activity from any Activities subpanel (Legacy modules), Planned Activities dashlet (Sidecar modules), as well as Calls, Meetings, or Tasks subpanels (Sidecar modules) on related module records.

Note: It is recommended that if you are going to be relating the activity to any other record in Sugar, best practice is to create the activity while on the related record's detail view (Legacy modules) or record view (Sidecar modules), which will automatically relate the two records.
Use the following steps to create a call via the Quick Create quick create menu as an example:

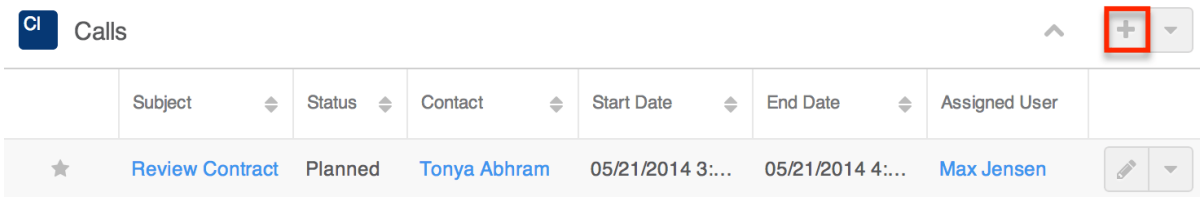
1. Open the Quick Create menu on the upper right of any Sugar page and select "Log Call". You can also quick create calls using the following methods:



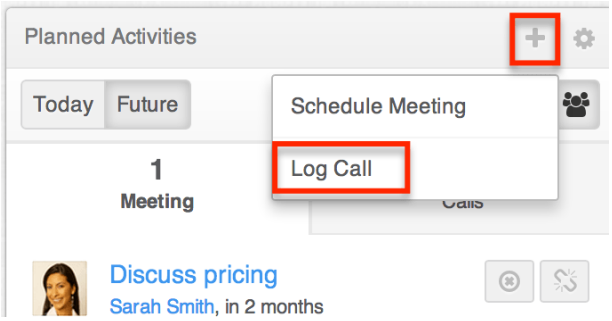

From Activities subpanel:




From Calls subpanel:




From Planned Activities dashlet:




2. Refer to step 2 and beyond in Creating Via Meetings Module section of the Meetings documentation for additional instructions about creating meeting records.

## Adding Reminders

Sugar includes the ability to remind invitees when they have a call or meeting that is scheduled to begin in a given amount of time. Reminders can be sent via email to all of the invitees prior to the call or meeting's scheduled start date and time. By default, reminders have to be manually added to calls and meetings upon creating or editing the activity. Users can configure their default reminders via their User Preferences, which will automatically select the default reminder time in the Reminders field.

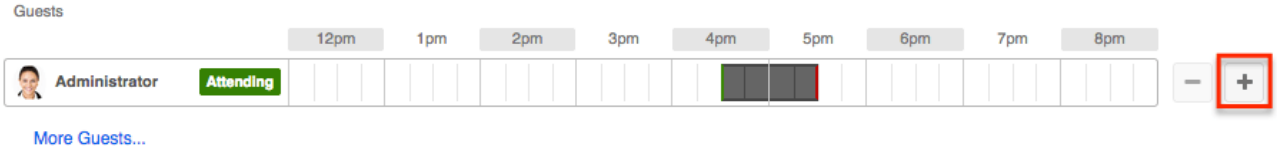
For more information on adding reminders, please refer to the Calls and Meetings documentation.

## Adding Invitees

Users have the option of adding additional invitees (e.g. Contacts, Leads, Users) to calls and meetings via the Add Invitees or Create an Invitee option in the Calls or Meetings edit or quick create view. Please note that the user creating the call or meeting as well as the contact or lead selected in the Related To field will automatically be added as invitees to the call or meeting. You can simply remove yourself or an attendee from the call by choosing the remove button on the Scheduling panel or "Unlink" from the Invitees panel.

### Adding Via Add Invitees

Users have the option to add invitees to the Guests panel directly from the meeting or call record view.



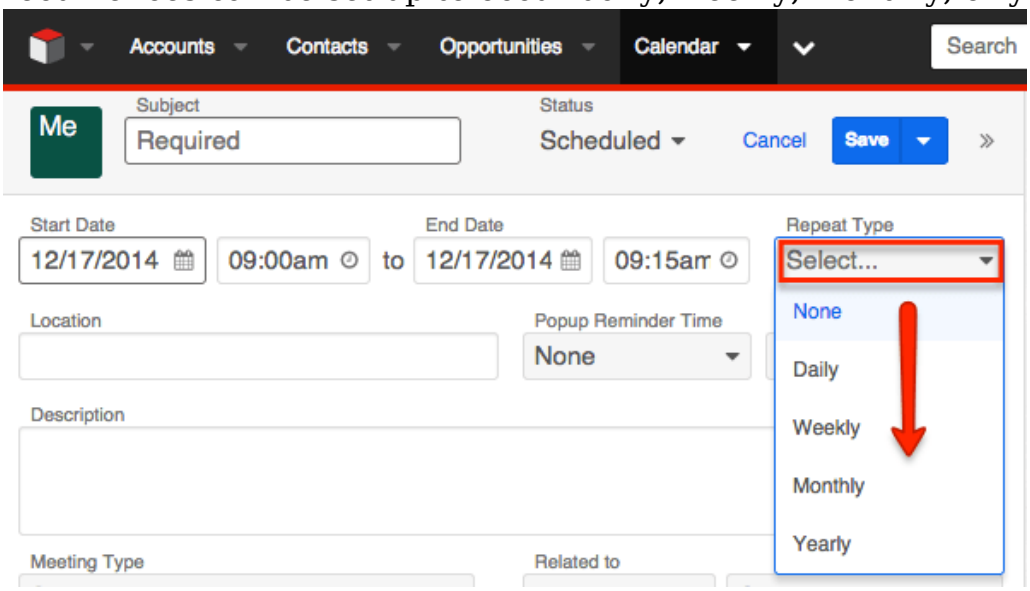

Please refer to the steps in the Adding Via Add Invitees section of the Meetings documentation for instructions on how to add invitees to meeting records.

### Adding Via Create an Invitee

Users have the option to create invitees and add them to the Guests panel directly from the meeting or call record view. Please refer to the steps in the Adding Via Creating an Invitee section of the Meetings documentation for instructions on how to add invitees to meeting records.

## Setting Meetings and Calls to Recur

Meetings and calls can be set as recurring events so that users do not have to create individual meeting or call records for regularly occurring events. Recurrences can be set up to occur daily, weekly, monthly, or yearly.




When a recurring meeting or call is configured, individual meeting records are created in Sugar, so when viewing the Meetings or Calls list view, all recurrences will show.

For more information on setting up, editing, and deleting recurring records, please

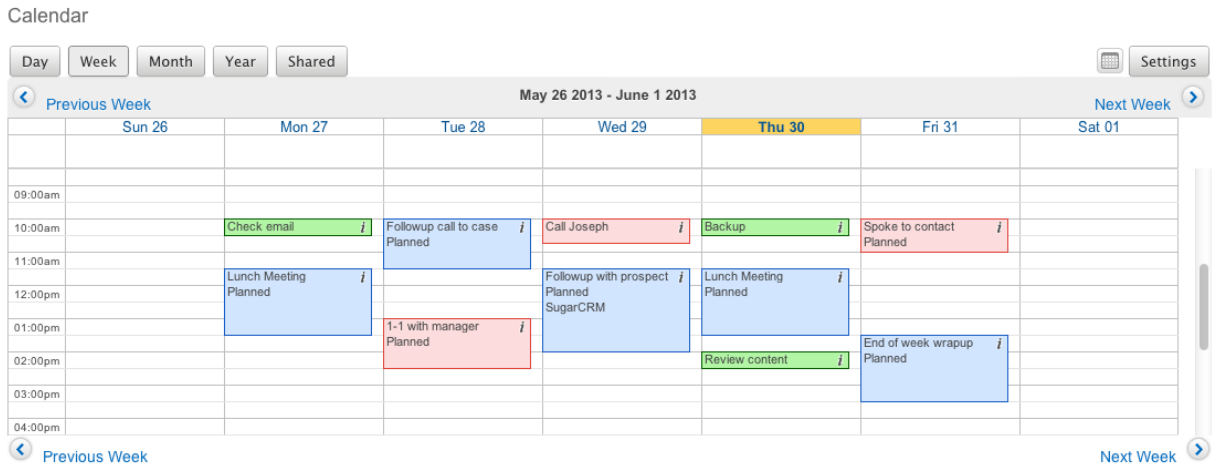
refer to the Calls and Meetings documentation.

## Viewing Via Calendar

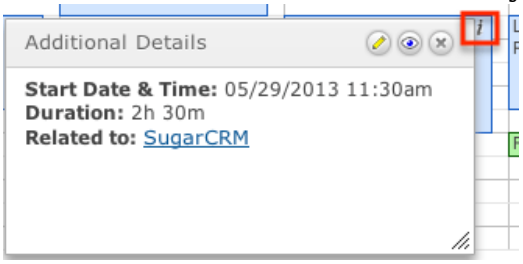
The Calendar module allows users to schedule, view, and manage various activities (Calls, Meetings, Tasks) in Sugar. The Calendar module can be accessed by clicking the Calendar module tab.

The three activity types are color coded on the calendar as follows:

| Module | Color |
|---|---|
| Calls | Red |
| Meetings | Blue |
| Task | Green |

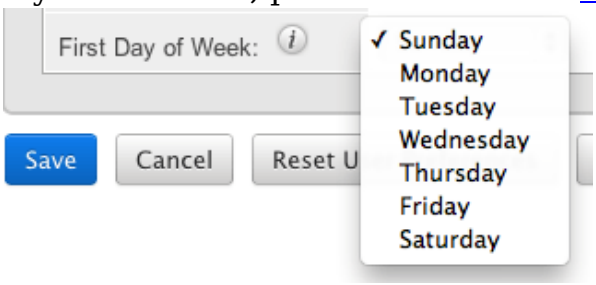



You can click the cell of an existing call or meeting to view the details via the Quick Create form. You can also click the "i" icon to the far right of the call record cell for a quick view of additional details (e.g. Subject, Start Date & Time, Duration, Related to, etc.) of any activity without opening up the record.

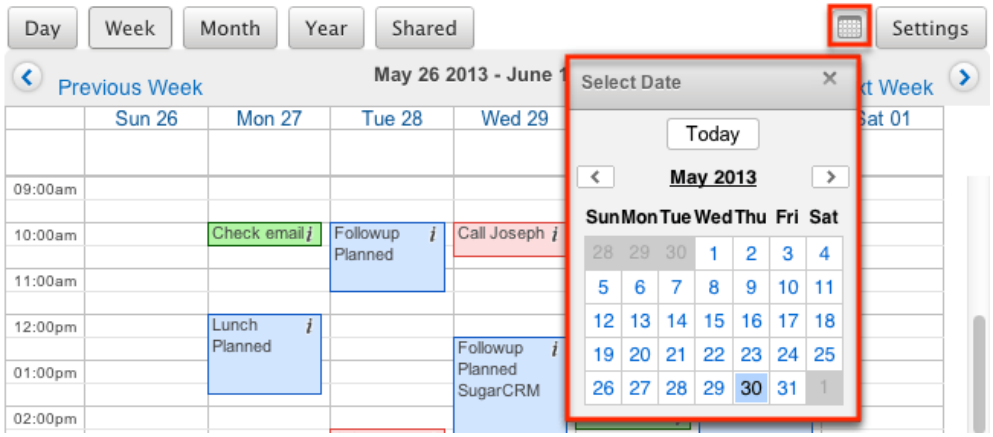



Please note that you will only be able to see activity records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide.

The Calendar module defaults to the week view and can be viewed as a day, week, month, or year view using the buttons at the top of the page. The week view can also be changed to have a different day of the week using the Calendar Options in your user profile. Simply navigate to the Advanced tab of your user profile then scroll to the Calendar Options panel and select the appropriate "First Day of Week" (e.g. Sunday, Monday, etc.). For more information regarding configuring the first day of the week, please refer to the Getting Started documentation.




When viewing the day, week, or month view of the calendar, you can jump to a specific date using the calendar pop-up in the top right of the screen. Select any date within the same month or use the left or right arrows to navigate to previous or upcoming months. You can also jump to today's date with the Today button in the pop-up calendar, or jump to a specific month or year by clicking on the displayed month in the pop-up calendar. Alternately, you can jump to the next day, week, month, or year, depending on your current view, using the Next and Previous buttons at the top and bottom of the calendar view. For more information on using the next and previous buttons, please review the Next or Previous Calendar View section of this documentation.




The look and feel of the calendar can also be changed via the Settings option to the right of the calendar pop-up.

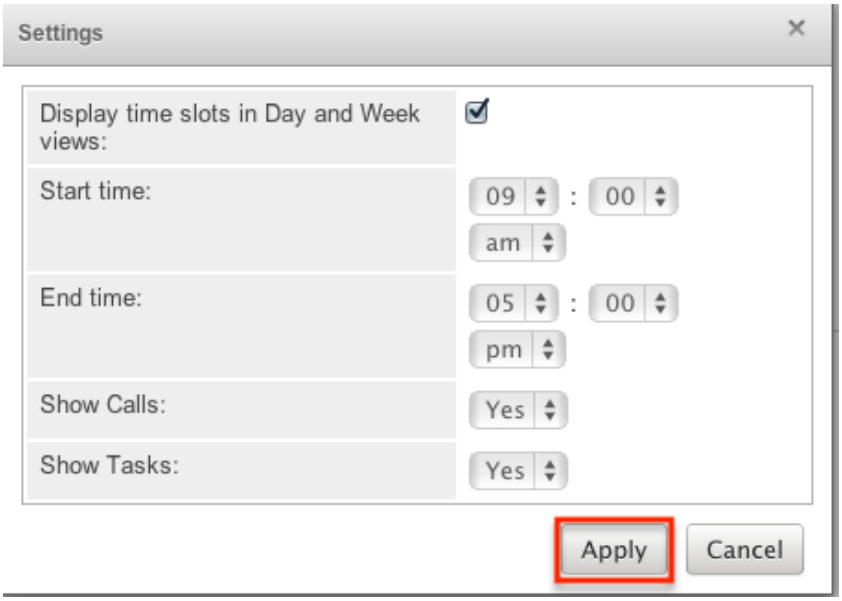
The Calendar settings allow you to perform the following actions:

- Display time slots in Day and Week views : When this option is enabled, activities are displayed in their specified time cells when viewing a day or week via the calendar. If this option is disabled, all activities will appear as a

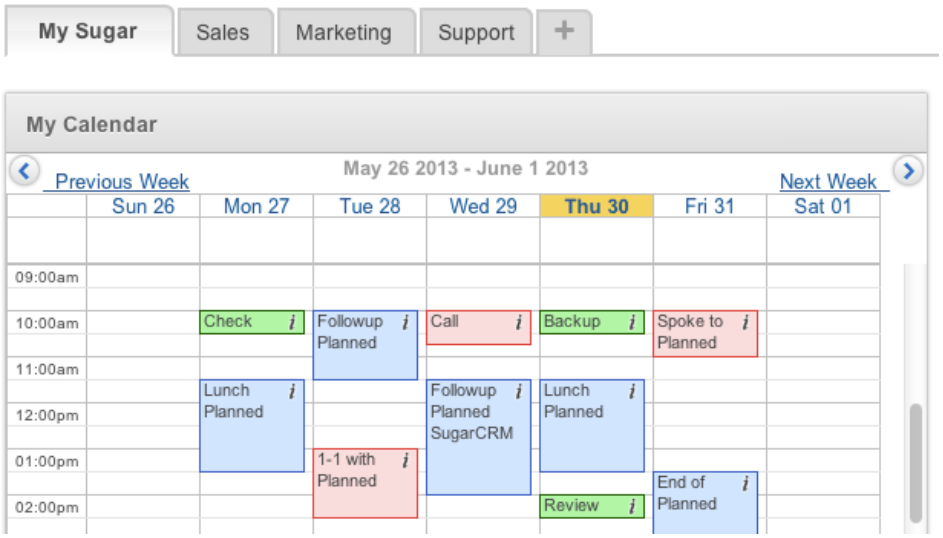
list. This option is enabled by default.

- Start Time : The value set in this field represents the first time cell displayed on your day or week calendar view (e.g. 09:00 am).
    - Note: This option is disabled and hidden if "Display time slots in Day and Week views" is disabled.
- End Time : The value set in this field represents the last time cell displayed on your day or week calendar view (e.g. 05:00 pm).
    - Note: This option is disabled and hidden if "Display time slots in Day and Week views" is disabled.
- Show Calls : When this option is set to "Yes", scheduled calls are also displayed in the calendar view. If you do not wish to see calls in the calendar view, set this option to "No". This option is set to "Yes" by default.
- Show Tasks : When this option is set to "Yes", scheduled tasks are also displayed in the calendar view. If you do not wish to see tasks in the calendar view, set this option to "No". This option is set to "Yes" by default.

Once all settings have been set, click "Apply" to update the calendar with your changes.



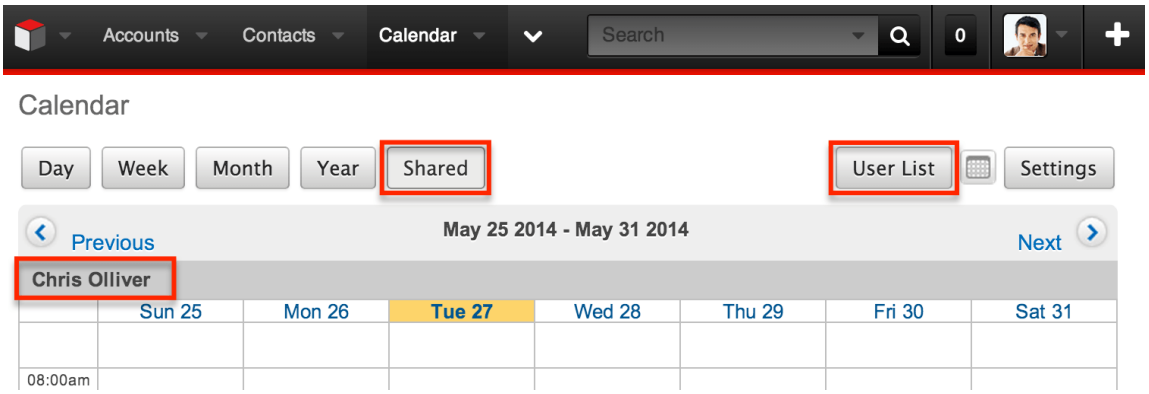

The calendar can also be viewed via the My Legacy dashboard on the Home page. Please note that the My Calendar dashlet is not available to view or add on the Home page for 7.x. The My Legacy dashboard enables you to view information from your existing 6.x dashlets such as My Calendar dashlet. Once your 6.x instance is upgraded to 7.x, simply navigate to the My Legacy Dashboard on the Home page to view all existing activities on the My Calendar dashlet. For more information regarding the My Legacy dashboard, please refer to the Home documentation.




## Viewing Shared Calendar

The Calendar module allows you to view not just your own activities, but you can also view the calendar of other Sugar users using the Shared Calendar. The calendar will show the selected user in a weekly view on one page. Using the shared calendar, users will also have the option to create activities for other users directly from the calendar. For more information on using the shared calendar, please refer to the Shared Calendar section of this documentation.

Please note that you will only be able to see activity records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide.

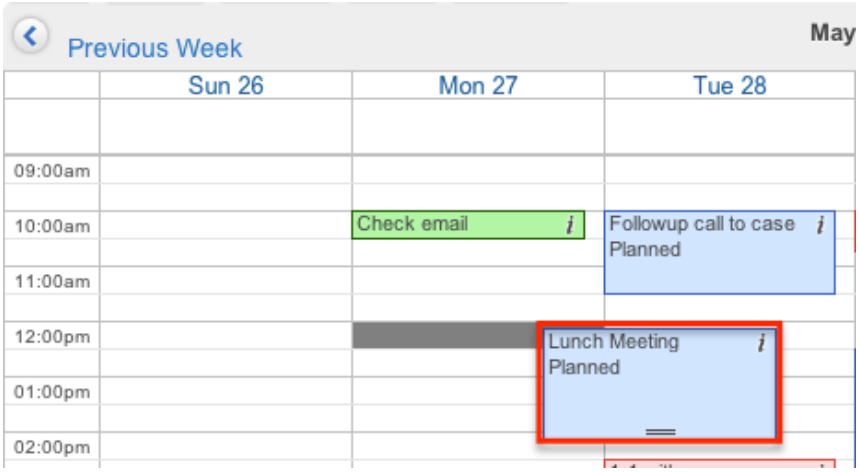



## Moving Scheduled Activities

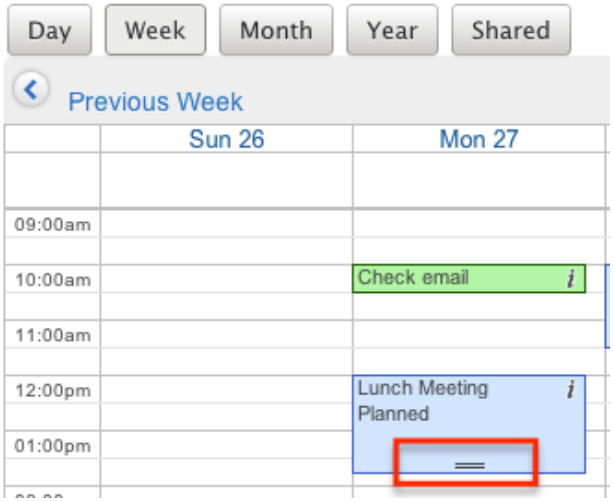
The Sugar calendar allows for the start time and duration of meetings and calls to be edited from the calendar, instead of having to directly edit the activity record

via the module. The records that appear on the calendar can also be dragged and dropped to new locations to change the start date and time.

Note: All occurrences of recurring meetings and calls cannot be modified by dragging one record of the series.




In addition, the activities can be dragged from the bottom of the box to be able to change the duration of the activity. To do this, simply hover over the activity's box to make the two lines appear at the bottom. Click the two lines and drag to the new end time of the call or meeting.

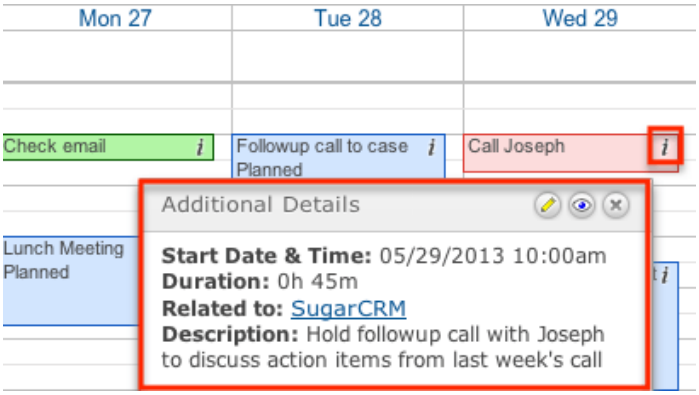



Note: Changing the meeting details with drag-and-drop does not send a system-generated update to the meeting invitees.

## More Information

Additional details for each activity can be viewed by clicking the "i" icon on the far right of each activity block on the calendar. This provides users a quick view of additional information in addition to what appears on the block. The pop-up window can also be used to access the record. Click the Pencil button to edit the record in the record view, the Preview button to view the record, or the "X" button

to close the pop-up window.



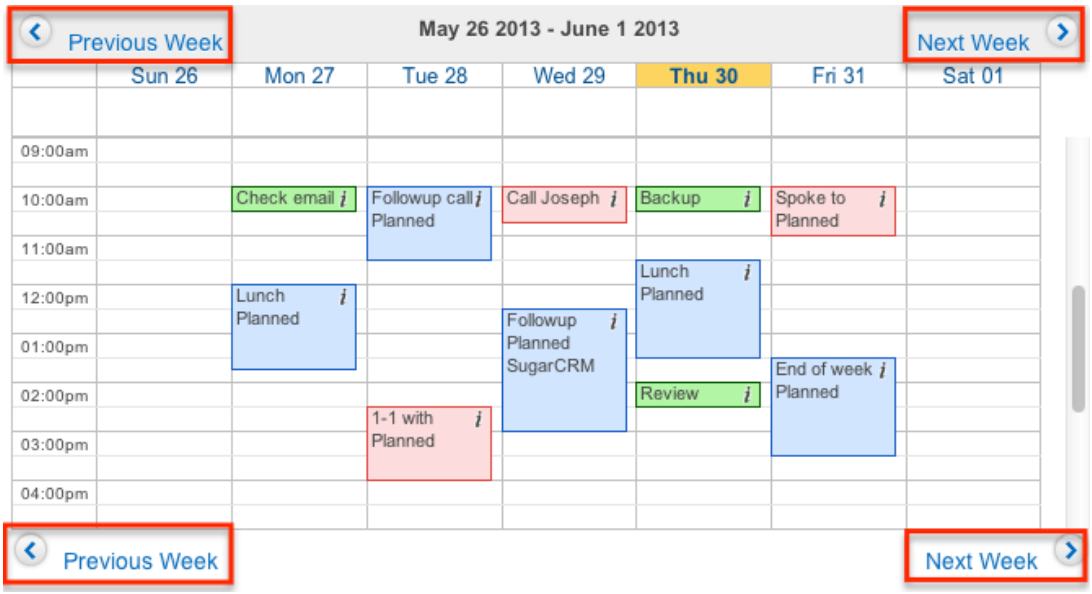

The resulting pop-up window will show the following fields by default:

| Module | Fields |
|---|---|
| Calls | Subject<br>Start Date & Time<br>Duration<br>Related to<br>Status<br>Description (abbreviated) |
| Meetings | Subject<br>Start Date & Time<br>Duration<br>Related To<br>Status<br>Description (abbreviated) |
| Tasks | Start Date & Time<br>Due Date & Time<br>Priority<br>Status<br>Description (abbreviated) |

Note: The list of fields appearing here may only be configured through a code-level customization.

## Next or Previous Calendar View

On the four corners of the Calendar, there are buttons that allow you to page through the given time frame in groups at a time, either the next or previous day, week, month, or year. The timeframe will change depending on which calendar you are viewing. When viewing the shared calendar, these buttons will always paginate by the week.



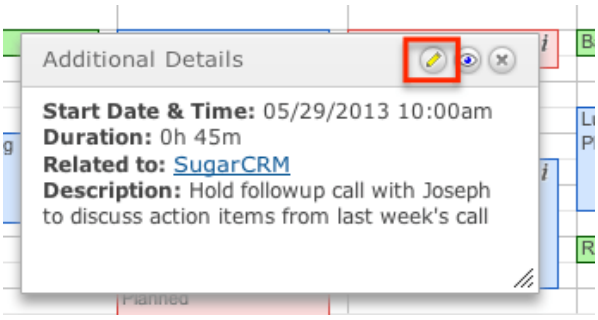

## Editing Activities

Activities on the calendar can be edited directly from the calendar instead of having to access the record via the individual modules (e.g. Calls). Dragging and dropping activity cells within the calendar can make changes to the start and end dates. For more information on moving activities from within the calendar, please refer to the Moving Scheduled Activities section of this documentation.

Use the following steps to edit an activity via the calendar:

1. Navigate to the calendar by clicking the Calendar module tab.
2. Locate the activity (e.g. Call) you would like to edit and click on the cell to open it in record view.
3. Make the necessary changes to the activity, including setting reminders, adding invitees, or set any recurrences of the activity.
4. Once the necessary information is entered, click "Save" or, if you would like an invitation email to go out to the invitees where they can accept or deny the call or meeting, click "Save and Send Invites".

The record view can also be reached by clicking the Pencil button on the More Information pop-up for the activity. Please review the More Information section of this documentation for more information about using this popup.

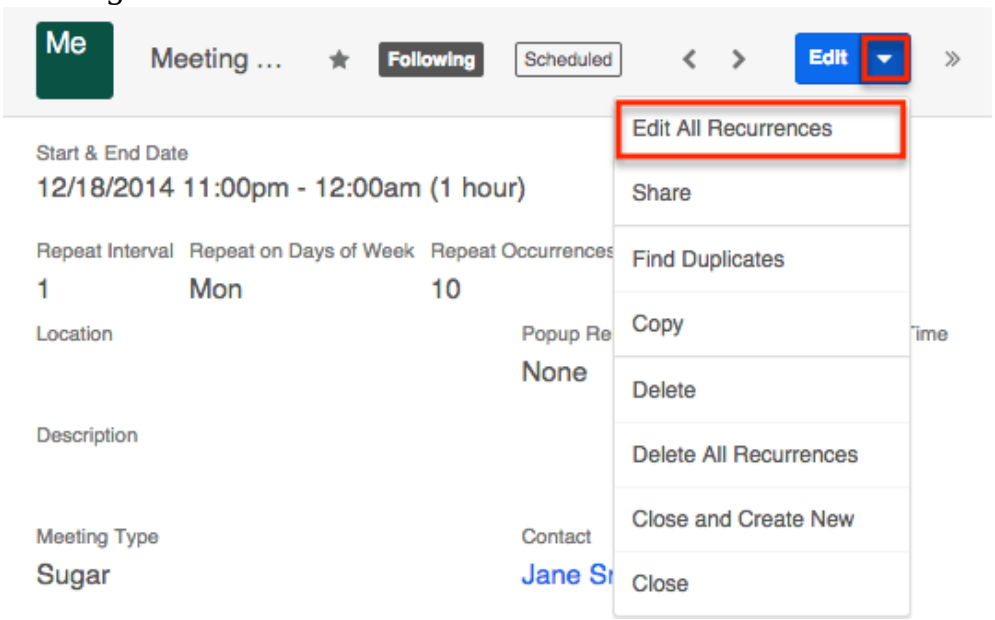



Please note that your ability to edit activities in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure the record view layouts via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

## Editing Recurring Meetings and Calls

When a meeting or call is set to be recurring, additional copies or duplicates of the call or meeting record are created for the specific time and date of each recurrence. Therefore, editing one record's cell on the calendar will not affect the other recurrences of the same call or meeting and will only affect the one recurrence you are editing. Users must select Edit All Recurrences from the meeting record's Action Menu.



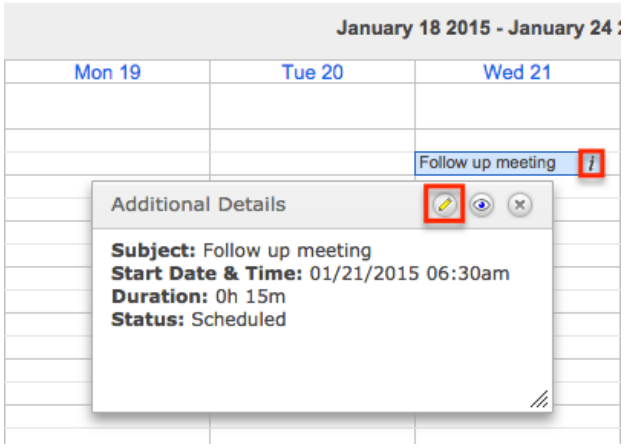

Please refer to the steps in the Editing All Recurrences via Record View section of the Meetings documentation for instructions on how to edit all recurrences.

## Deleting Calls and Meetings Via Calendar

If a call or meeting record is invalid or should no longer appear on your calendar or in Sugar, it can be deleted through the record view via the calendar.

Use the following steps to delete a record via the calendar:

1. Navigate to the calendar by clicking the Calendar module tab.
2. Locate the call or meeting you would like to delete.
3. Click "i" icon located to the right of the subject and select the pencil icon from the popup.




4. This will take you to the meeting or call record view. Please refer to the steps in the Deleting Via Record View section of the Meetings documentation for instructions on how to delete meetings.

Recurring calls and meetings can be deleted by this method if you would like to delete the individual call or meeting. Deleting one record through this process will not remove the entire series. Please refer to the steps in the Deleting All Recurrences via Record View section of the Meetings documentation for instructions on how to delete all recurrences.

Note: Your ability to delete calls and meetings in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

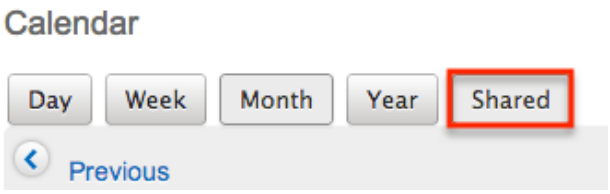
## Shared Calendar

The Shared Calendar option in the Calendar module allows you to view other user's calendars which is helpful when scheduling calls or meetings as well as keeping track of the other user's activities. The shared calendar also gives you the

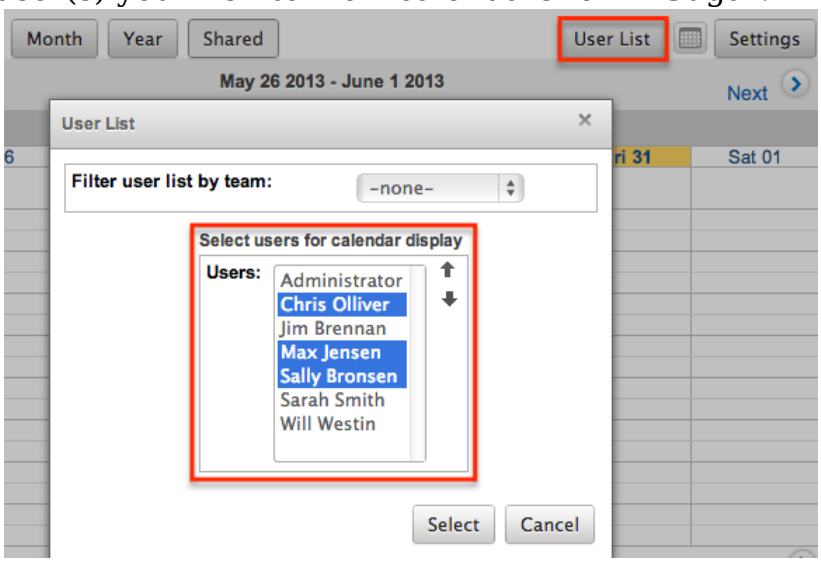
ability to schedule meetings and calls on behalf of the user so that they are automatically an invitee to the activity and the assigned user. Please note that the shared calendar is always viewed as a weekly view.

Use the following steps to enable the shared calendar:

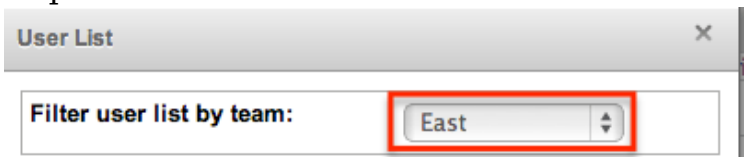
1. Navigate to the calendar by clicking the Calendar module tab.
2. Click the Shared button on the upper left of the page.




3. Click the User List button on the upper right of the page then select the user(s) you wish to view calendars for in Sugar.




Note: You can filter the Users list by using the Filter user list by team dropdown above the Users list.




4. Click "Select" after choosing the user(s) to display all of the user's weekly calendars on the Calendar page.

Please note that you will only be able to see and edit activity records on the shared calendar as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide.

## Publishing Calendars

Sugar allows users to share calendars between applications to ensure that activities do not overlap between calendars. The Sugar calendar can be viewed in other applications such as the Outlook calendar to display the user's free/busy time from Sugar.

### Publishing Your Sugar Calendar

Sugar calendars can be shared and viewed with various iCal-compatible calendar applications (e.g. Apple Calendar or Google Calendar). The calendars are viewable as read-only in the external calendar applications and any edits to existing activities can only be done in Sugar. For more information on sharing your calendar on another application, please review the Calendar Options section in the Getting Started documentation.

### Publishing to Your Outlook Calendar

You can specify settings in another application, such as Outlook, to enable the ability to view a user's free/busy information from the Sugar calendar. Please note that the settings must be configured on each user's computer. Once configured, the invitee shows as busy for any times currently scheduled in Sugar if the user's email address in Sugar matches the invitee email address in Outlook.

Use the following steps to configure this functionality:

1. In Sugar, navigate to your user preferences and select the Advanced tab.
2. Copy the Search location URL located at the bottom in the Calendar Options panel.
3. In Outlook, go to File > Options > Calendar > Free/Busy Options.
4. In the Internet Free/Busy section, paste the Search location URL into the corresponding box.

## Integrating With MS Outlook

Sugar allows you to sync meetings and calls in Sugar with your local installation of Microsoft Outlook using the Outlook Plug-in. The plug-in also allows you to archive emails and sync contacts. All meetings and calls, including recurring ones, can be synced using the plug-in. When a meeting or call is synced from Outlook to Sugar, the meeting or call will appear on the Sugar calendar, but will not be editable via Sugar and only viewable.

For more information on using the Outlook Plug-in, please review the Sugar

Plug-in for MS Outlook User Guide.

## Integrating With IBM Lotus Notes

Sugar allows you to sync activities in Sugar with your local installation of Lotus Notes using the Lotus Notes Plug-in. The plug-in also allows you to archive emails and sync contacts. All activities, including recurring ones, can be synced using the plug-in. When a meeting or call is synced from Lotus Notes to Sugar, the activity will appear on the Sugar calendar, but will not be editable via Sugar and only viewable.

For more information on using the Lotus Notes Plug-in, please review the Sugar Plug-in for IBM Notes User Guide.

Last Modified: 02/13/2017 11:24am

# Calls

## Overview

Sugar's module consists of open, upcoming, or closed call records logged by users in your organization. There are various ways you can create calls in Sugar such as via the module, Calendar module, importing calls, etc. Users can also log calls via the Activities subpanel (for Legacy modules) or Planned Activities dashlet (for Sidecar modules) on related module records (e.g. Contacts, Accounts, Leads, etc.), which automatically creates a relationship between both records. Once the call record is created, you can view and edit information pertaining to the call via the record view. This documentation will cover how to use the module as well as the various actions and options available from within the module.

## Call Fields

The module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

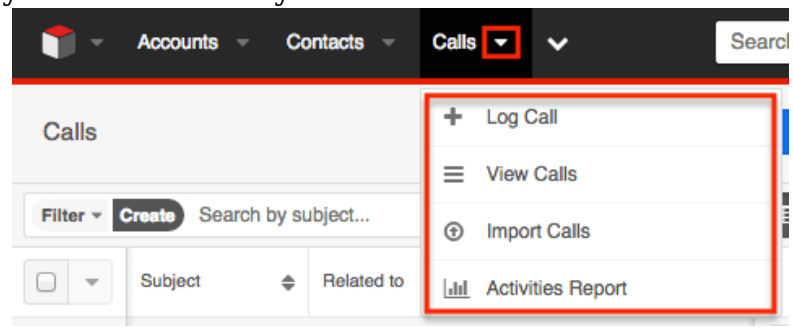
| Field | Description |
|---|---|

| | |
|---|---|
| Assigned To | The Sugar user assigned to the call |
| Created By | The Sugar user who created the call |
| Date Created | The date the call record was created |
| Date Modified | The date the call record was last modified |
| Description | A description or other information about the call |
| Direction | Indication of whether the call is inbound or outbound |
| Email Reminder Time | Trigger a reminder email to all call invitees a specified time prior to the call's start time |
| End Date | The end date and time for the call |
| Modified By Name | The name of user who last modified the call record |
| Outlook ID | The Outlook appointment item ID when the Sugar Plug-in for Microsoft Outlook syncs an Outlook appointment |
| Popup Reminder Time | Trigger a reminder popup alert to all Sugar user invitees a specified time prior to the call's start time.<br><br>Note: Users must be logged into Sugar in an open browser window in order to receive the popup reminder. |
| Related To | The related module record associated to the call |
| Start Date | The start date and time for the scheduled call |
| Status | The current status (e.g. Scheduled, Held, Canceled) of the call |
| Subject | The subject of the scheduled call |
| Teams | The Sugar team(s) assigned to the call record |

## Calls Module Tab

The Calls module tab is typically found by clicking the arrow to the right of the module tabs on the navigation bar. The additional modules will appear on the list

and you can click "Calls" to access the list view. Once the Calls tab displays on the navigation bar, you can click the triangle within the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of calls you last viewed in the module. The Favorites menu displays the list of calls you most recently marked as favorites in the module.




The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|---|---|
| Log Call | Opens the record view layout in edit mode to create a new call |
| View Calls | Opens the list view layout to search and display calls |
| Import Calls | Opens the import wizard to create or update calls using external data |

If you do not see the module tab in Sugar, please check the following:

- The module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the module for your entire Sugar instance. Reach out to your Sugar administrator to have the module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

## Creating Calls

There are various methods for creating calls in Sugar including via the module,

Calendar module, quick create, duplication, and import. The record view opens in edit mode when creating the call directly from the menu, Quick Create menu, and the Calendar module and includes all of the relevant fields for your organization. When using quick create to make a call while viewing an existing record of another module, Sugar automatically creates a relationship between both records. For example, if you are viewing a contact or lead record (e.g. John Smith) and create a new call via their record view, the Related To field in the call record will automatically populate to "John Smith", thus creating the relationship and adding him as an invitee, as well as adding his associated account. Please note that if a call is created through the subpanel in a contact or lead record, they can not be removed as an invitee during the creation process. The record view layout can be configured by administrators via Admin > Studio.

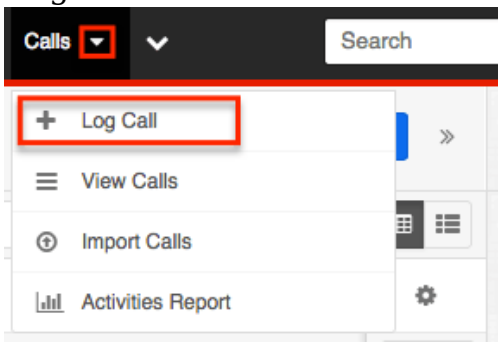
For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

## Creating Via Calls Module

One of the most common methods of call creation is via the module using the Log Call option in the module tab. This opens the record view layout in edit mode which allows you to enter all of the relevant information for the call.

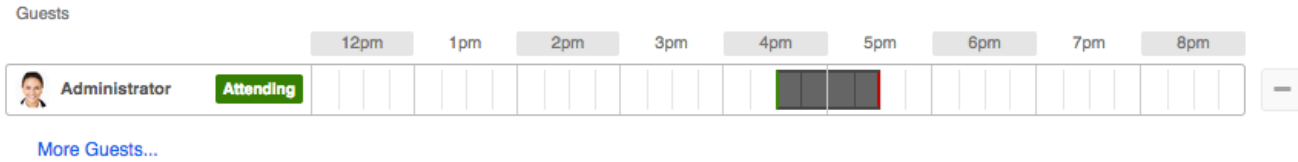
Use the following steps to create a call via the module:

1. Click the triangle in the Calls module tab to open the Actions menu and select "Log Call".

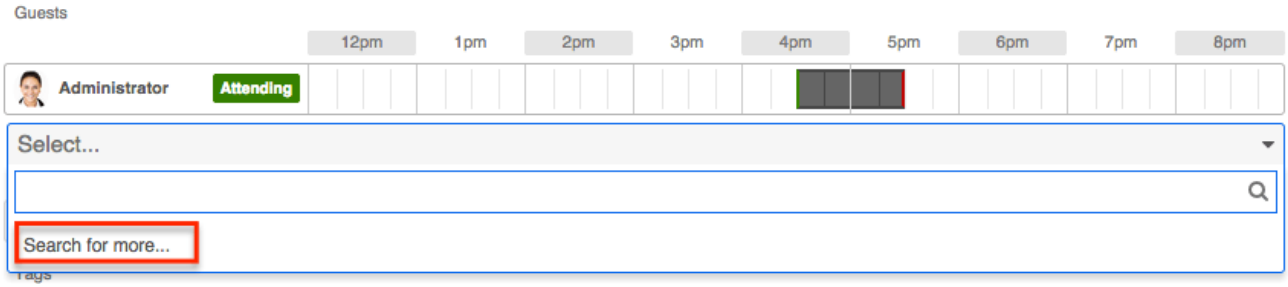



2. Enter appropriate values for the fields in the record view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
3. To set a reminder for invitees, select a time in the Email Reminder Time or Popup Reminder Time field. Refer to the Adding Reminders section of this documentation for instructions on how to set up a reminder.
4. To schedule the call as recurring, click the Repeat Type field and select the appropriate interval from the dropdown (e.g. Daily, Weekly, etc.). Refer to the Setting Up Recurrences section of this documentation for instructions on setting up recurrence calls.

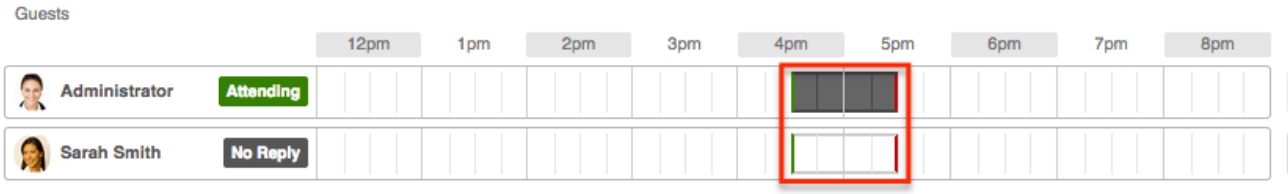
5. Users can add, create, and view invitees in the Scheduling panel. For more information on adding invitees, please refer to the [Adding Invitees to Calls] section of this documentation.
    - To add invitees (e.g. Contacts, Leads, and Users) to the call, scroll to the Guests panel and select "+" located on the far right.



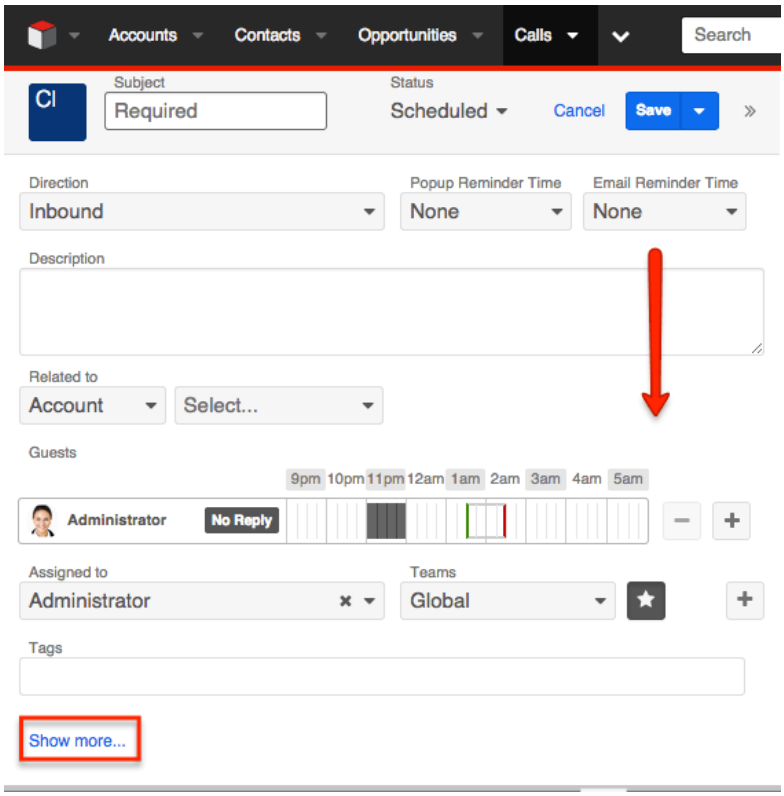

    - To create and add an invitee, scroll to the Guest panel, select "+", and then select "Search for more...".



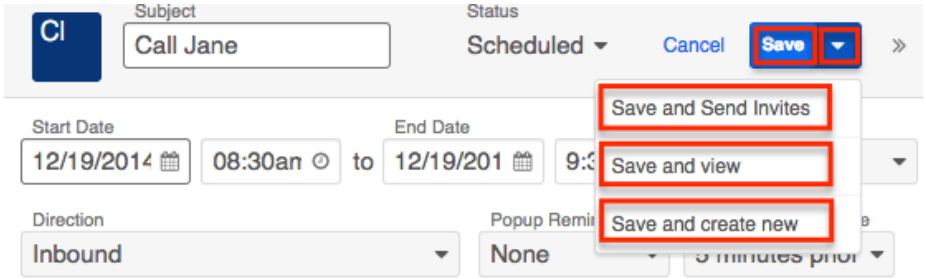

    - The list of all invitees will appear in the Scheduling panel. The duration of the call will be indicated by a green line (start time) and red line (end time). The Scheduling panel will display any busy times (e.g. calls already scheduled) by blocking it out in blue, and any scheduling conflicts with other calls will be blocked out in brown.




6. If additional fields are desired than those initially displayed, scroll down and click "Show more...".



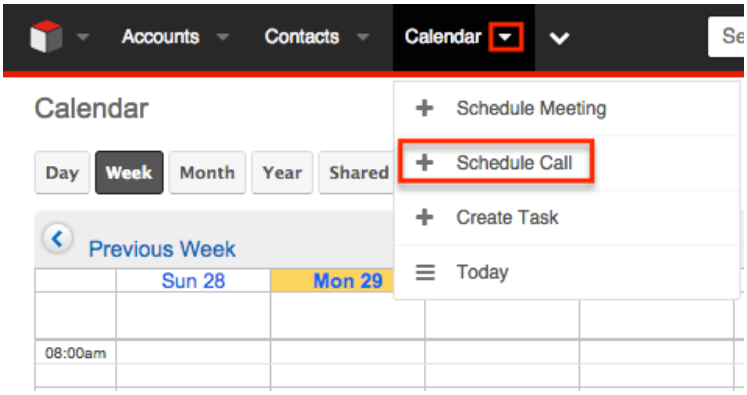

7. Once all the appropriate information is entered, click "Save", "Save and Send Invites", or one of the other save options.
    - Save : Saves the call record without sending an email invite to invitees; takes the user to the Calls list view.
    - Save and Send Invites : Saves the call record and sends an email invite to invitees. The invitees will be able to accept, tentatively accept, or decline the scheduled call via the email invite.
    - Save and view : Saves the call record and the record view appears.
    - Save and create new : Saves the call record and opens a new, blank record view in edit mode where the user can create another record.




## Creating Via Calendar

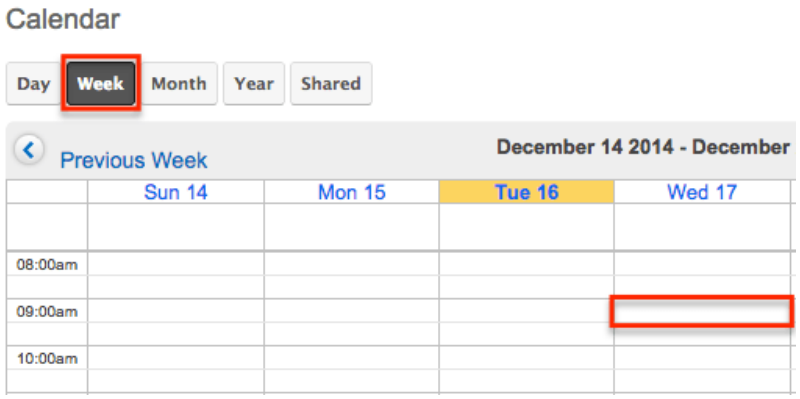
There are two methods of creating calls in the Calendar module. The first method is to create a call via the Schedule Call option in the Calendar module tab. This will open up the record view in edit mode to create a new call record. For more information on creating calls via the module, please refer to the Creating Via

Module section of this documentation.

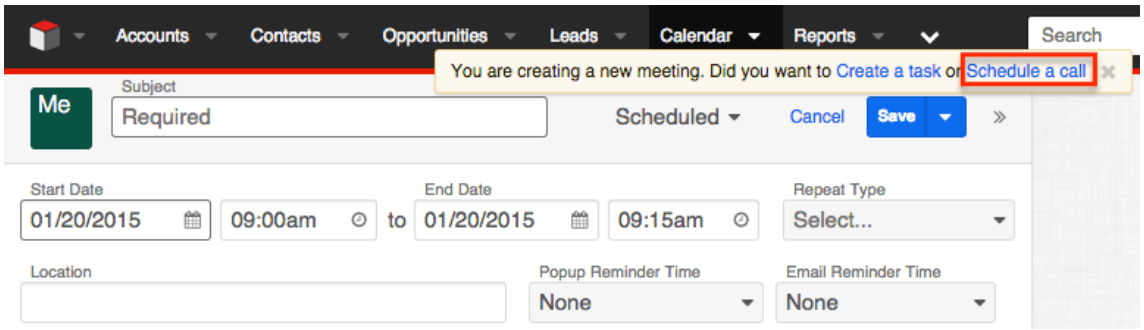



The second method is to create the call directly via the user's Sugar calendar using the following steps:

1. Click the Calendar module tab.
2. On the calendar view, click the cell corresponding to the date and time you wish to schedule the call. You can choose to view the calendar by Day, Week, Month, Year, or Shared. For more information on viewing the shared calendar, please refer to the Calendar documentation.




3. When a cell is selected, a popup will appear at the top of the drawer. Select "Schedule a call".

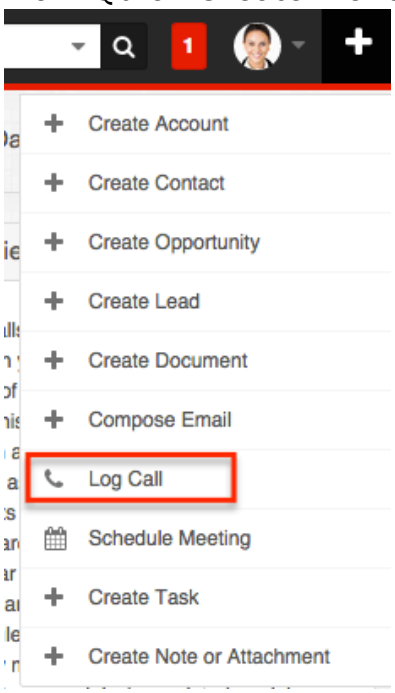
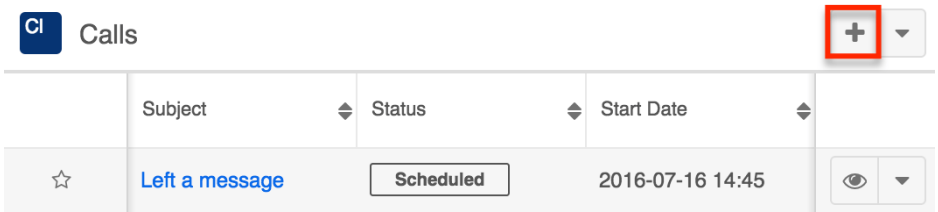


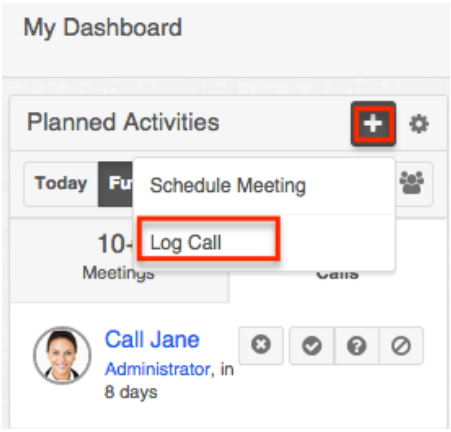

4. Refer to step 2 and beyond in Creating Via Module above for additional instructions about creating call records.

## Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the Plus button on the upper right of all Sugar pages to access the menu. You can also quick create a call from any Activities subpanel (Legacy modules), Calls subpanel (Sidecar modules), or Planned Activities dashlet (Sidecar modules) on related module records. When quick creating calls, the Related To field is automatically populated with the module and record you are currently viewing.

Use the following steps to create a call via the Quick Create menu as an example:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Log Call". You can also quick create calls using the following methods:
   From Quick Create menu:
   
   
   From Calls subpanel:
   
   
   From Planned Activities dashlet:



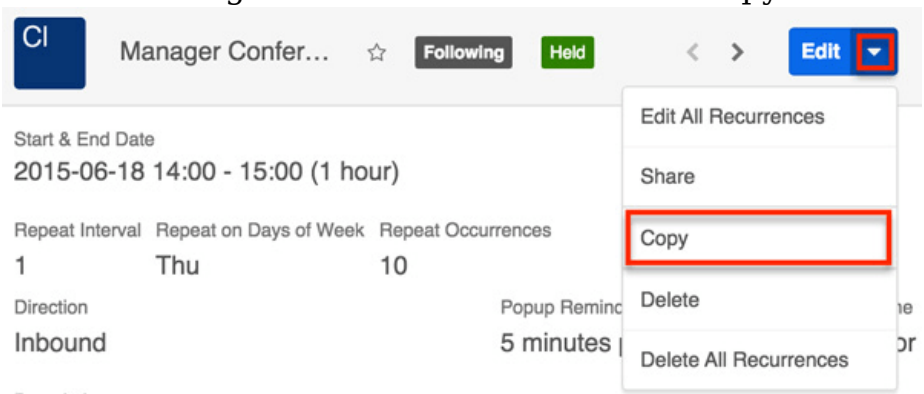

2. Refer to step 2 and beyond in Creating Via Module above for additional instructions about creating call records.

## Creating Via Duplication

You can also create a new call by duplicating an existing call record. The duplicate option is useful if the call you are creating has similar information to an existing call. Please note that existing subpanel relationships for the original call record will not carry over to the duplicated call record.

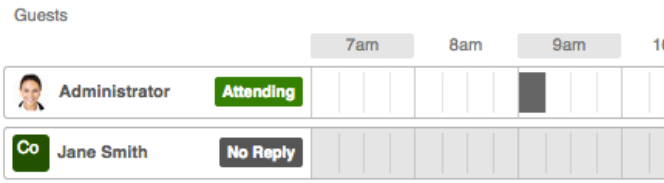
Use the following steps to create a call by duplicating an existing record:

1. Navigate to a call's record view.
2. Click the triangle beside "Edit" and select "Copy".




   The displayed record view is pre-populated with the original call's values. Update the necessary fields.
3. Refer to step 2 and beyond in Creating Via Module above for additional instructions about creating call records.

Note: The original record's invitees will also be included in the duplicated call record. You can remove the invitees from the Scheduling panel by clicking the Minus icon on the far right of the invitee names.

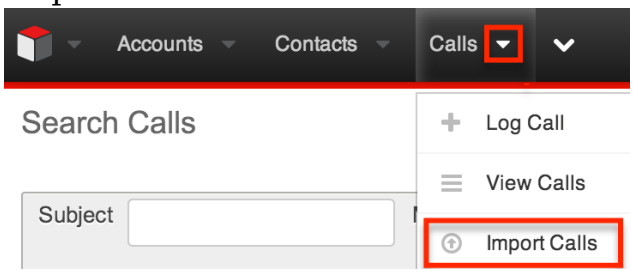



## Importing Calls

The import function allows you to push multiple call records into Sugar using a comma (or other character) delimited file instead of creating them one-by-one. For more information on importing, please refer to the Import documentation.

Use the following steps to import calls via the Import option:

1. Click the triangle to access the Actions menu in the module tab and select "Import Calls".




2. In Step 1, select the import file and choose "Create new records only". Click "Next".
3. In Step 2, confirm the import file properties. Click "Next".
4. In Step 3, confirm the field mappings for the import. Click "Next".
5. In Step 5, view the import results.
    - The Created Records tab will show all of the new call records.
    - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
    - The Errors tab will show records that were not imported due to errors detected during import.

## Viewing Calls

There are various options available for viewing call records in Sugar including via Calls list view, Calls record view, Calls Recently Viewed menu, Calendar module, dashlets, and reports. Please note that you will only be able to see call records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

## Viewing Via List View

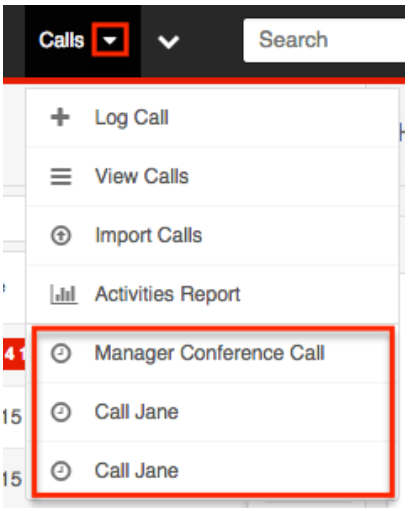
The Calls list view displays all call records meeting the current search criteria. Users can also access the activity stream to view posts specific to the call record. For more information on the Record View's Activity Stream, please refer to the Activity Stream section of this documentation. The Intelligence pane can also be viewed to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's sales, cases, activities, etc. For more information regarding the Record View's Intelligence Pane, please refer to the Intelligence Pane section of this documentation. To access the list view, simply click the Calls module tab. While list view shows key call fields, you can click the call's name to open the record in record view. For more information on viewing calls via list view, please refer to the List View section of this documentation.

## Viewing Via Record View

The calls record view displays thorough call information including all call fields followed by subpanels of the call's related records belonging to various modules. Users can also access the activity stream to view posts specific to the account record. For more information on the Record View's Activity Stream, please refer to the Activity Stream section of this documentation. The Intelligence pane can also be viewed to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's sales, cases, activities, etc. For more information regarding the Record View's Intelligence Pane, please refer to the Intelligence Pane section of this documentation. The record view can be reached by clicking a call record's link from anywhere in the application including from the Calls list view. For more information on viewing calls via the record view, please refer to the Record View section of this documentation.

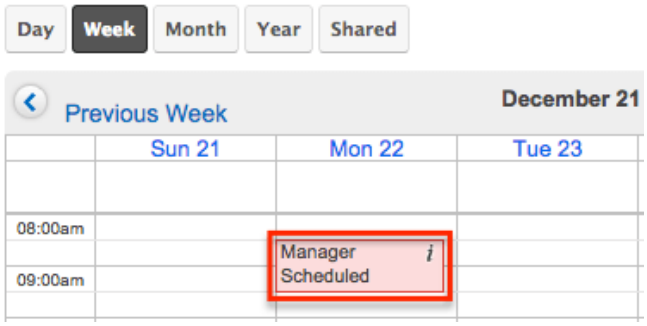
## Viewing Via Recently Viewed

As you work, Sugar will keep track of which calls you have recently viewed. Click the Actions menu in the module tab to see a list of your most recently viewed calls, and click each name to open the Calls record view.




## Viewing Via Calendar

The Calendar module allows users to schedule, view, and manage various activities (Calls, Meetings, Tasks) in Sugar. Call records are displayed in red on the calendar and you can click the corresponding cell to view the call details. You can also click the "i" icon to the far right of the call record cell for a quick view of additional details (e.g. Subject, Start Date, etc.) of the call without opening up the record. For more information on viewing and managing calls on the calendar, please refer to the Calendar documentation. Users also have the ability to view other users scheduled activities via the shared calendar option. For more information on viewing the shared calendar, please refer to the Calendar documentation.

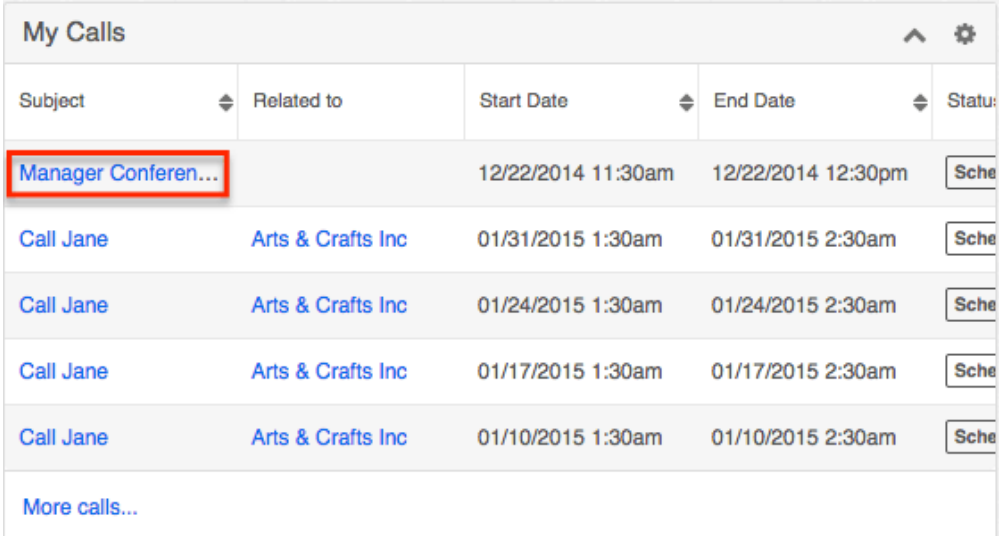



Please note that you will only be able to see call records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

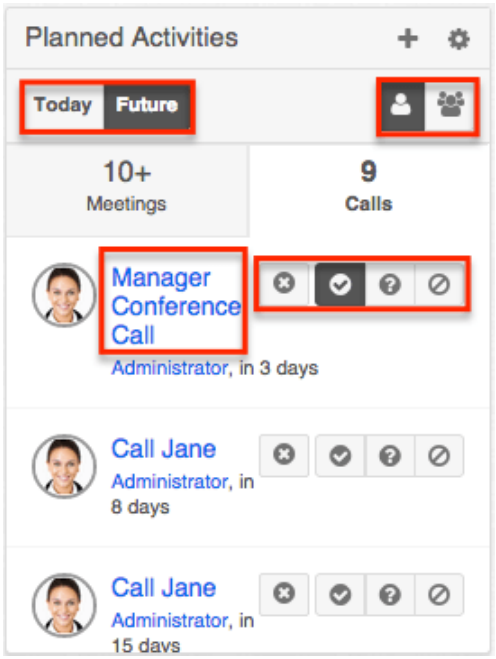
## Viewing Via Dashlets

Sugar Dashlets allow users to get a quick view of various records, activities, etc. Dashlets may be added to a user's Home page or to the intelligence pane of any Sidecar module (e.g. Accounts). You can view call information in List View dashlets

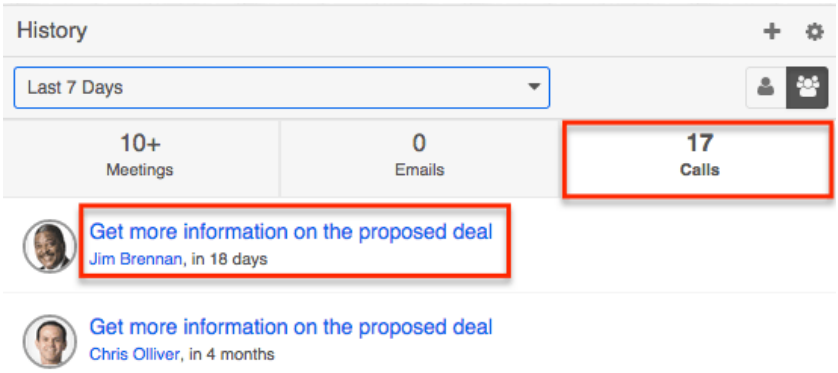
specific to the Calls module (e.g. My Calls dashlet), as well as List View dashlets based on other modules such as "My Notes". Clicking a call's name from any dashlet will open the Calls record view. For more information on using dashlets and viewing call records via dashlets, please refer to the Intelligence Pane documentation.




The Planned Activities dashlet on the record view's intelligence pane provides users with a list of open or upcoming calls and meetings that are related to the current record you are viewing. Click the Calls tab to view a list of scheduled calls and you can view more information regarding the call by clicking the call's name on the dashlet. You can filter the dashlet to view either the current day's logged calls or upcoming calls in the future by toggling between the Today or Future button. Please note that any open calls where the start date is prior to the current data will display an Overdue status in red on the dashlet. For more information on using dashlets and viewing call records via the Planned Activities dashlet, please refer to the Intelligence Pane documentation. You can also accept, tentatively accept, decline, or close the call in the Planned Activities dashlet by clicking the buttons to the right of the call's row in the dashlet. For more information on closing calls as held, please refer to the Closing Calls section of this documentation.

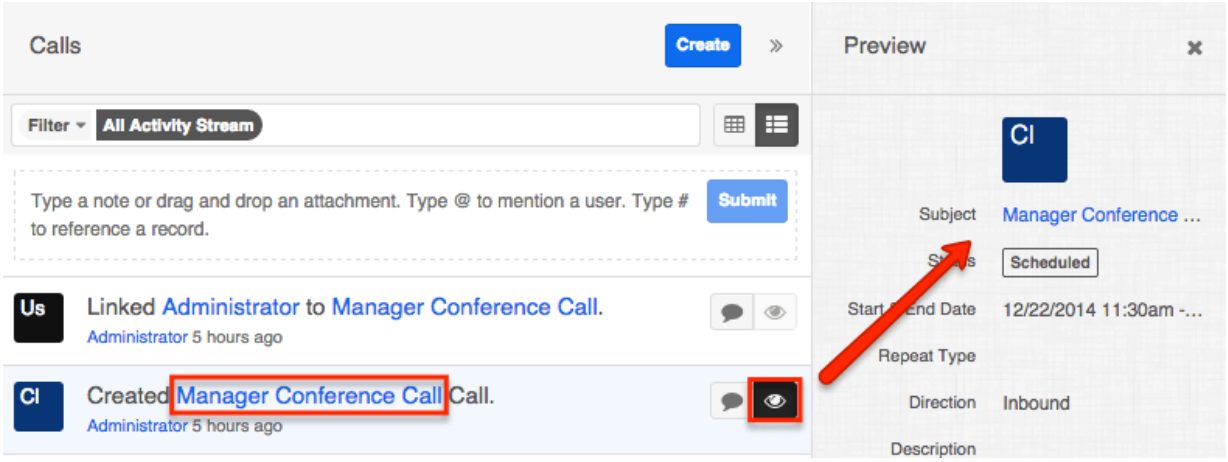



The History dashlet on the intelligence pane displays a history of the record's related activities (e.g. calls, meetings, emails) that have already taken place. To view all held calls for the record, simply click the Calls tab. You can also filter (Last 7 Days, Last 30 Days, Last Quarter) the History dashlet to only display a specific subset of the calls matching the set time frame. For more information on using dashlets and viewing call records via the History dashlet, please refer to the Intelligence Pane documentation.



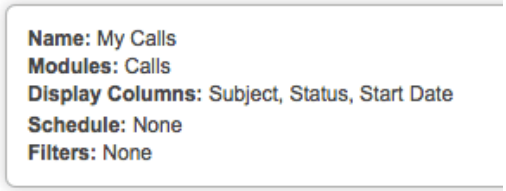

## Viewing Via Activity Streams

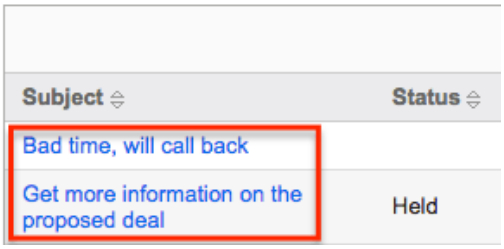
The activity stream allows users to view each other's activities in Sugar and the actions that took place for the various modules (e.g. Calls, etc.) via posts (record post, user post, etc). You can access the Call record view by clicking the call's name referenced in the post. You can also preview the call record's detail directly from the activity stream by clicking the Preview button to the right of the post. For more information on viewing records via the activity stream, please refer to the Activity Streams documentation.




## Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding calls and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the call record's record view by clicking the call's name in the report results. Please note that you can only directly access call record views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation.




Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

# Searching Calls

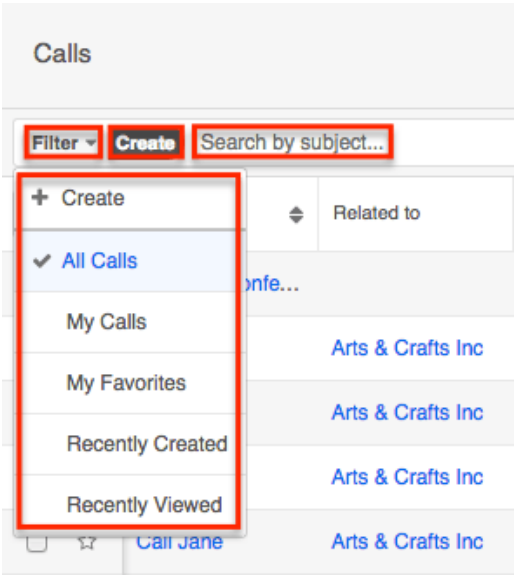
The Calls list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Calls list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %review). This will pull up any record that has the word "review" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

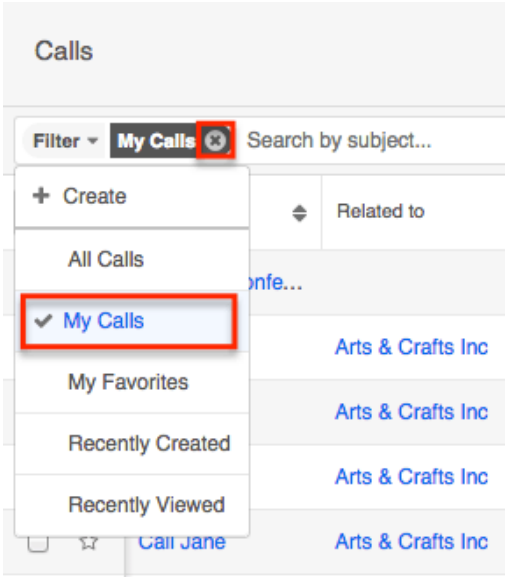
## Module Search

Module search enables users to easily search by call name within the Calls module and pull up matching records in the list view. The search also provides a Filter option which can be used in combination with the open Search box to narrow your search further using the available options as follows:

- Create : Create a new custom filter which you can use to filter your search
  - Note: You can also click "Create" to the right of the Filter option.
- All Calls : Returns all records in the module to which you have access
- My Calls : Returns only records assigned to you
- My Favorites : Returns only records you have marked as favorites
- Recently Created : Returns only records you created in the module within the last 7 days
- Recently Viewed : Returns only records you have viewed in the module within the last 7 days




When you choose a filter, Sugar will return calls which match both the selected filter and any name provided in the "Search by name..." bar in the filtered list view results. For example, if you select "My Calls" in the Filter options and enter a call name, Sugar will only return call records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search bar. To see all call records to which you have access, simply select the All Calls option in the filter and remove any text from the search bar. You can also click the Clear icon within the selected filter option (e.g. My Calls) in the Search bar to clear the filter and pull up all list view search results. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the module. In addition, searches using the open Search box only or in combination with advanced filters (e.g. My Favorites) are preserved as well when you navigate away from the module. Returning to the list view will automatically display the results of your last filter.




Please note that you will only be able to see call records as allowed by your team

membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Administrators can configure what fields appear on the Calls Module Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

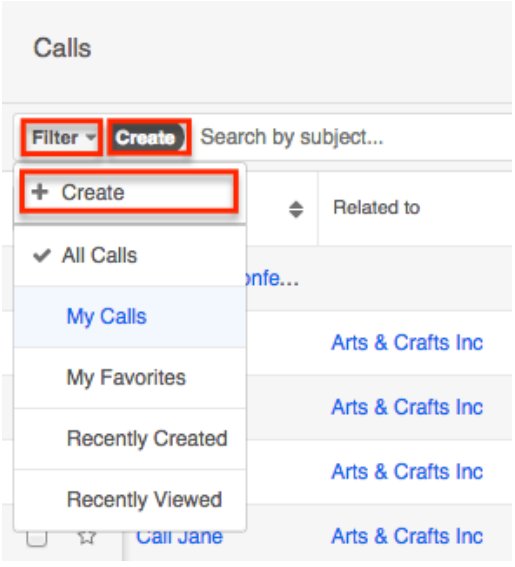
## Creating a Filter

Users can also create new filters via the Create option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the Calls list view. You have the option to add multiple fields to your new filter by clicking the Plus button to the right of the filter selection dropdown lists and set select operators along with their value(s). A filter's criteria needs to be true for a record in order for it to appear in the list view search result. Additionally, filters with no specified values may be saved as a custom filter to act as a filter template when a user often searches using the same fields but with varying values. Please note that only fields you have view access for will appear in the Filter list when creating a search filter.

When you run a search using a created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter.

The following steps cover creating a new Assigned to filter as an example:

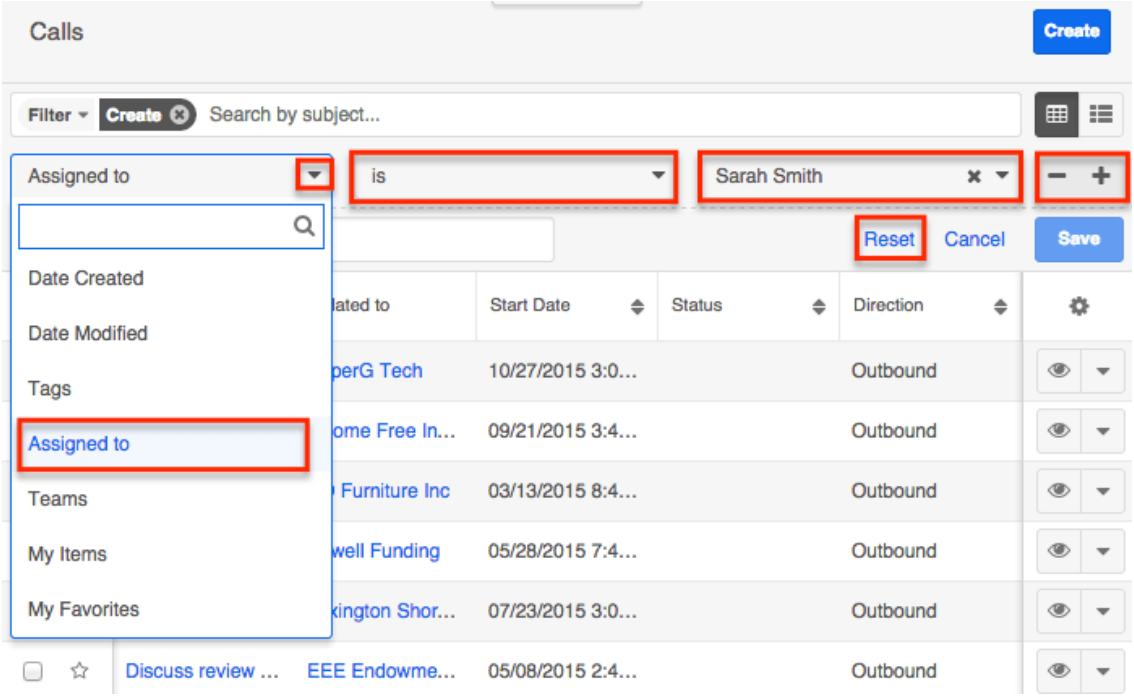
1. Click the Filter option on the Calls search bar then select "Create".
    - You can also click "Create" to the right of the Filter option.




2. Select the field you wish to add to your filter as well as the condition and matching criteria.

- Note: Only fields you have view access for will be available to add in the Filter list.

3. To add additional fields to the new filter, click the Plus button to the right of the filter.
   - To remove fields from the new filter, click the Minus button to the right of the filter.
   - To clear any filter values (e.g. Sarah Smith), simply click the "x" to the right of the value or select "Reset" to the left of the Save button.



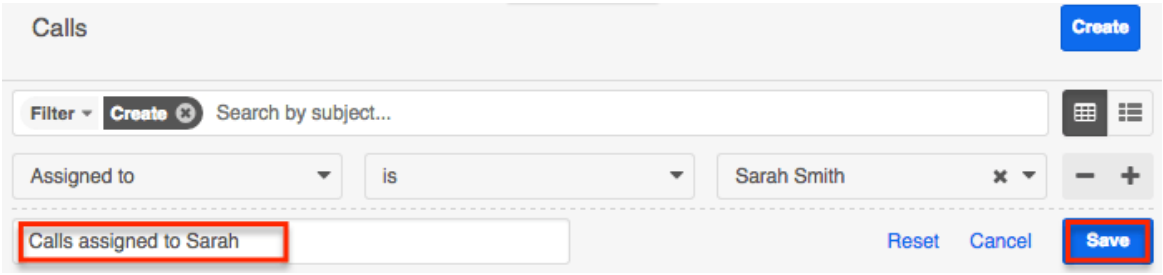

The list view will automatically display results matching your filters as you create and modify the criteria.

## Saving a Filter

Saving a filter will preserve the chosen fields as well as the condition(s) of the matching value(s). Additionally, it will allow users to easily select previously created and saved filters from the Filter options.

The following steps cover saving a new search by Name filter as an example:

1. Create a new filter to perform a search on your desired fields.
2. Enter in a name for the new filter (e.g. "assigned to Sarah").




3. Click "Save" to add this filter to the module's Filter options.

## Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search is used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.




To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

# Calls List View

The Calls list view displays all call records meeting the current search criteria to

which your user has access. You can view the basic details of each call within the field columns. Please note that you will only be able to see call records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

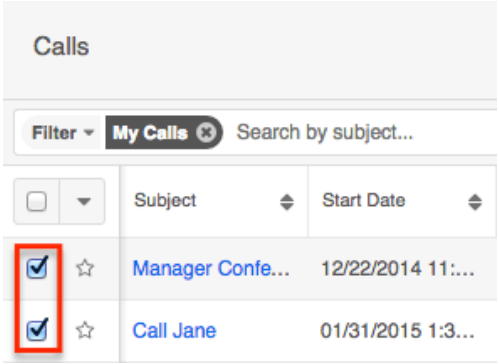
The available status colors in the Calls list view are as follows:

- Red : Calls where the start date is in the past and is not marked as Held.
- Blue : Calls where the start date is coming up within the next 24 hours and is not marked as Held.
- No color : Calls with the start date is in the future (beyond 24 hours) or if the status is marked as Held.

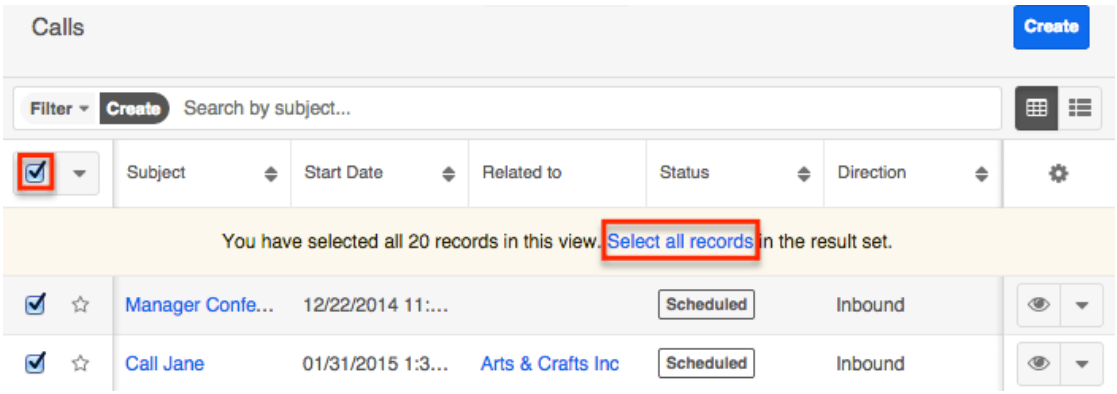
Users with administrator or developer access have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Checkbox Selection

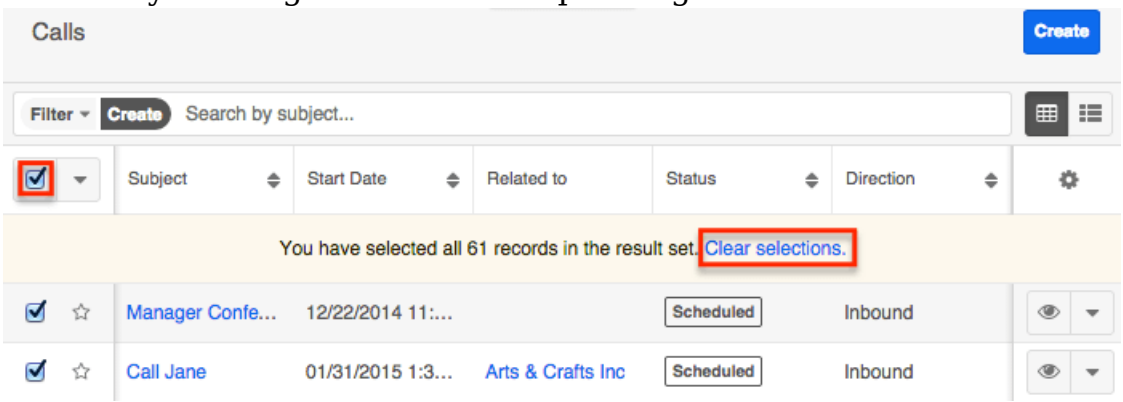
You can perform several actions on call records directly from the list view by first selecting the desired records. To select individual call records on the Calls list view, mark the checkbox on the left of each row.




To select all call records displayed on the current set of list view results, click the checkbox to the left of the Actions triangle. A dialog will appear below the list view column headers indicating that you have selected all records on the list view's current results set (e.g. 20). To select all records matching the current search results set, click "Select all records" in the dialog.

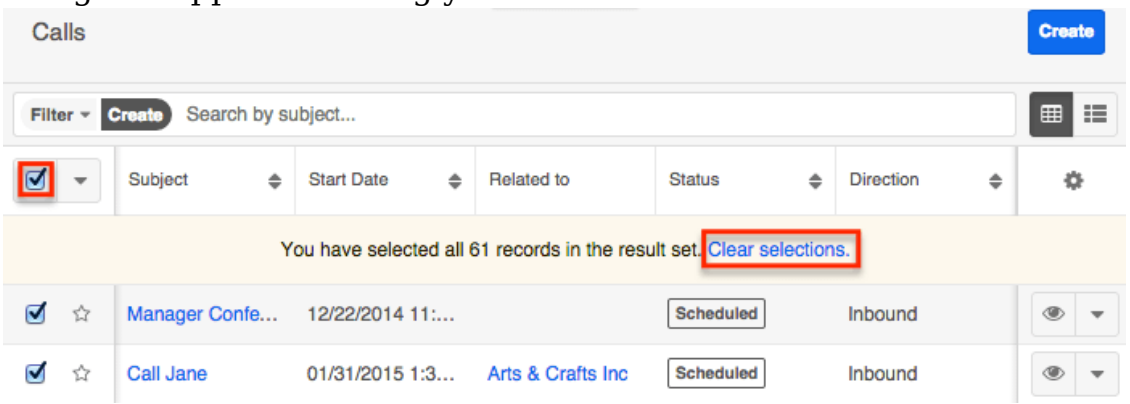



If you wish to clear the selection for all records on the list view result set, simply click "Clear selections" in the dialog. You can also clear the selections for all records by clicking the checkbox option again to remove the check marks.

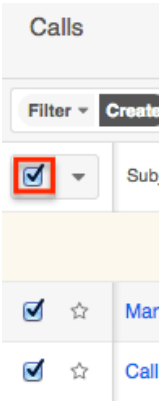



## Total Record Count

You can view the total record count on the Calls list view by selecting all records displayed on the current set of list view results. Once the records are selected, a dialog will appear allowing you to select all records in the results set.

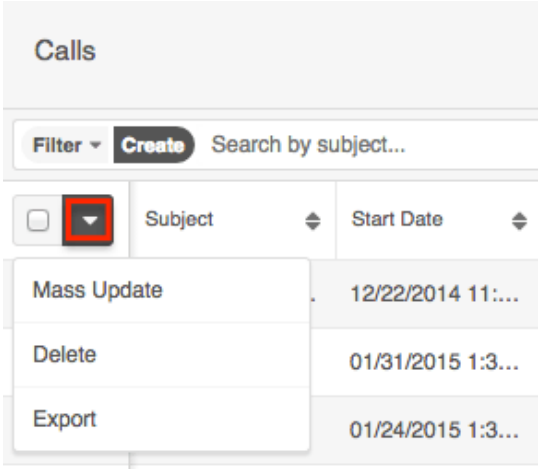



The total count of all records on the list view result set will appear in the dialog.




## Mass Actions Menu

The Mass Actions menu to the right of the checkbox option allows you to perform various actions on the currently selected records.



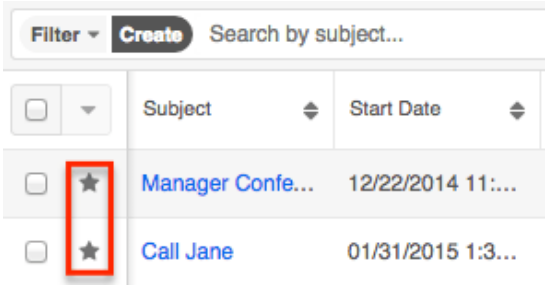

The options in the Mass Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Mass Update | Mass update one or more calls at a time |
| Delete | Delete one or more calls at a time |
| Export | Export one or more calls to a CSV file |

## Favorite Designation

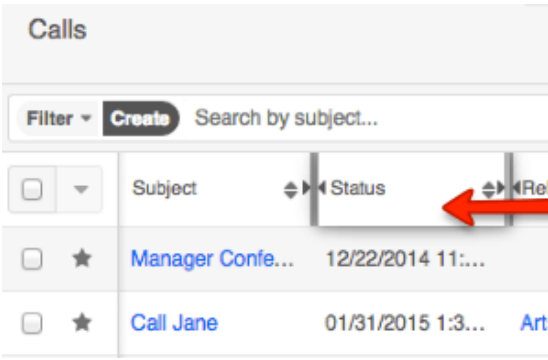
Users have the option to mark call records as favorites via the list view as well as the record view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the Calls module tab. In the Calls list view, the star on the left of each call's row is

grey once marked to indicate a favorite call. For more information on how to mark records as favorites, please refer to the Favoriting Calls section of this documentation.




## Column Reordering

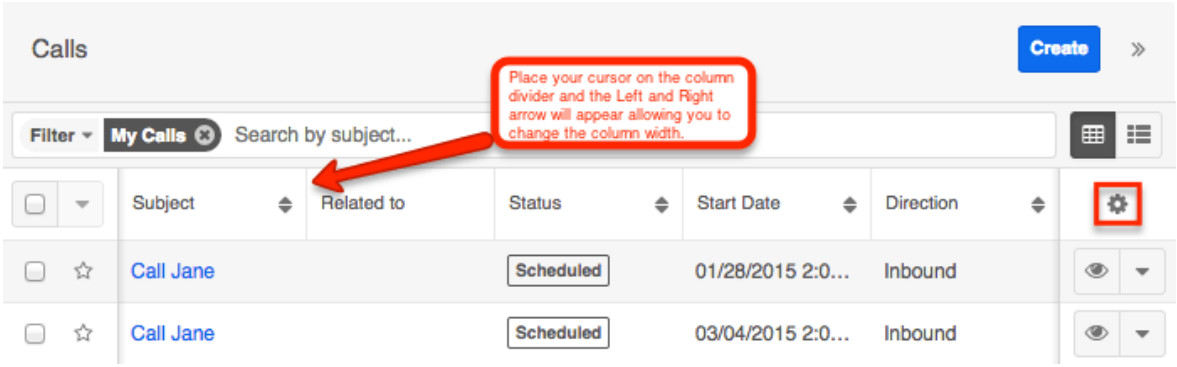
List view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the default column order.




## Column Resizing

Users can easily adjust the size of columns in the Accounts list view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the current list view is different from the default column width. Changes to the column width made by administrators in Studio are only respected if the user has not resized the specific column in the list view. The column size set by the user will supersede the default

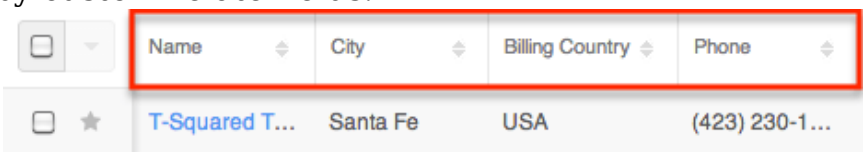
column width configured in Studio until the user resets the list view back to the default widths.




## Column Sorting

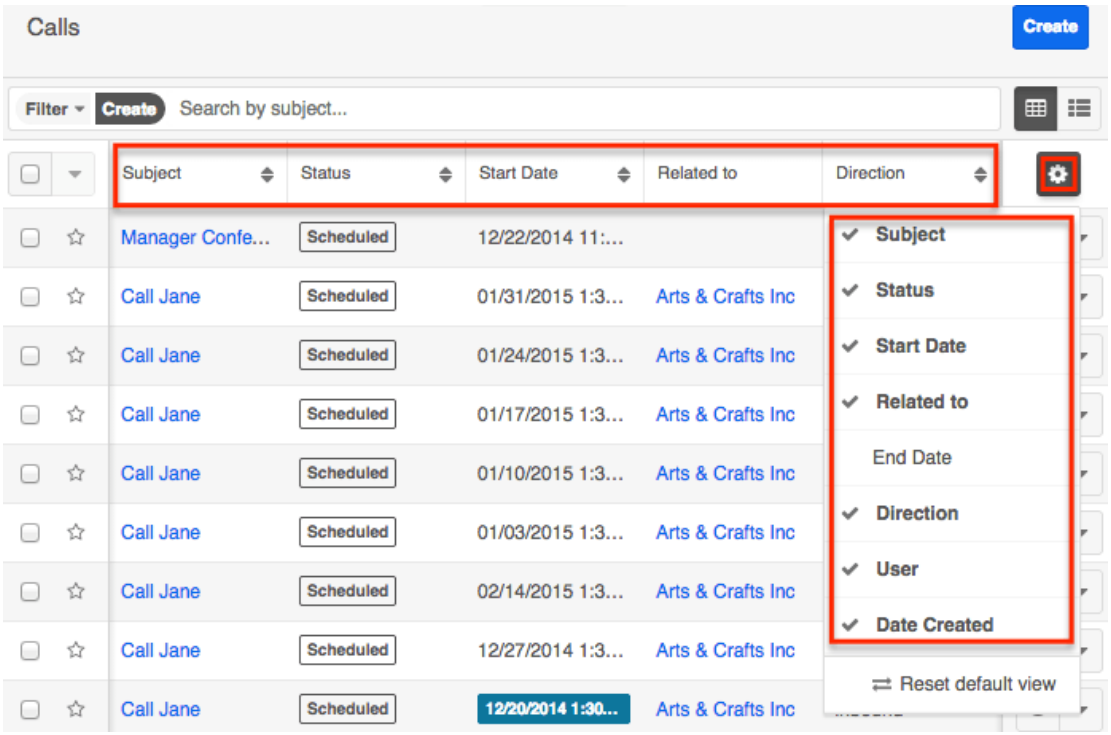
List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows.

Note: List views may only be sorted by one column at a time and cannot be sorted by custom relate fields.



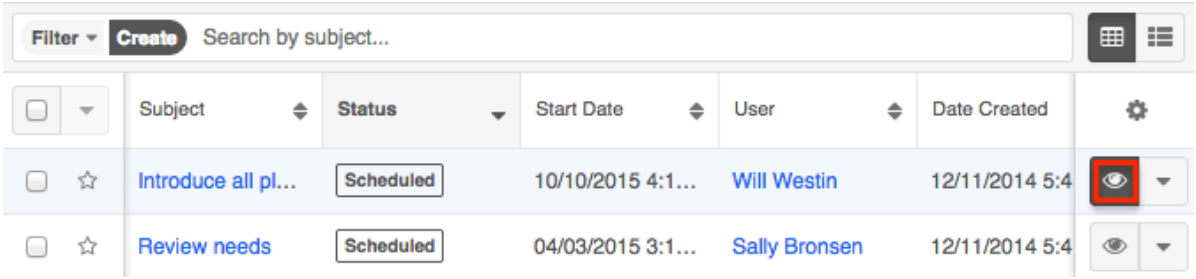

## Column Selection

Sugar gives users the ability to personalize the list view by specifying which fields they want displayed. You can click the Column Selection icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column on your list view. Please note that administrators have the ability to configure what fields are available to display in the list view via Admin > Studio. For more information on configuring fields to display in the list view, please refer to the Studio documentation in the Administration guide.

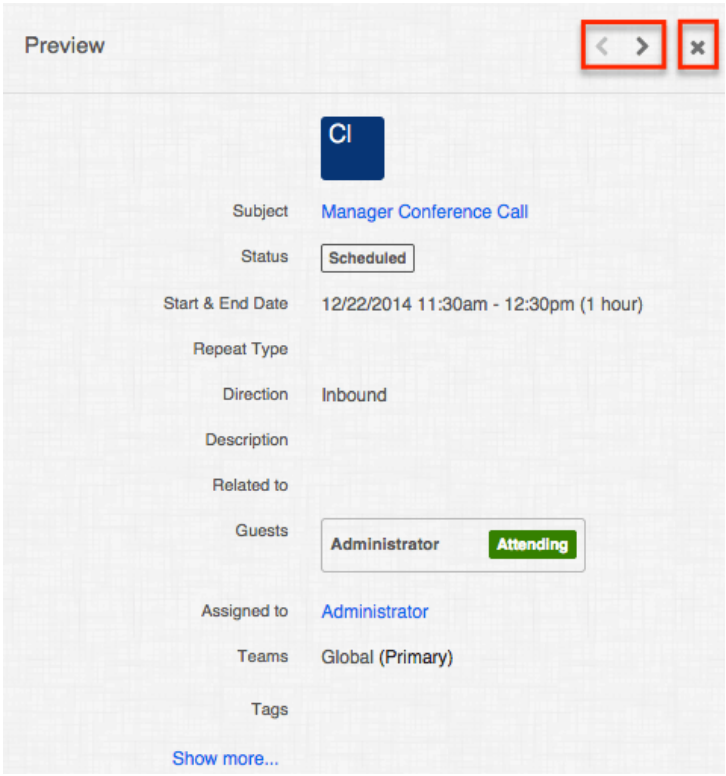



## Preview

Users can view a record's details directly from the Calls list view by clicking the Preview icon to the far right of each call's row.

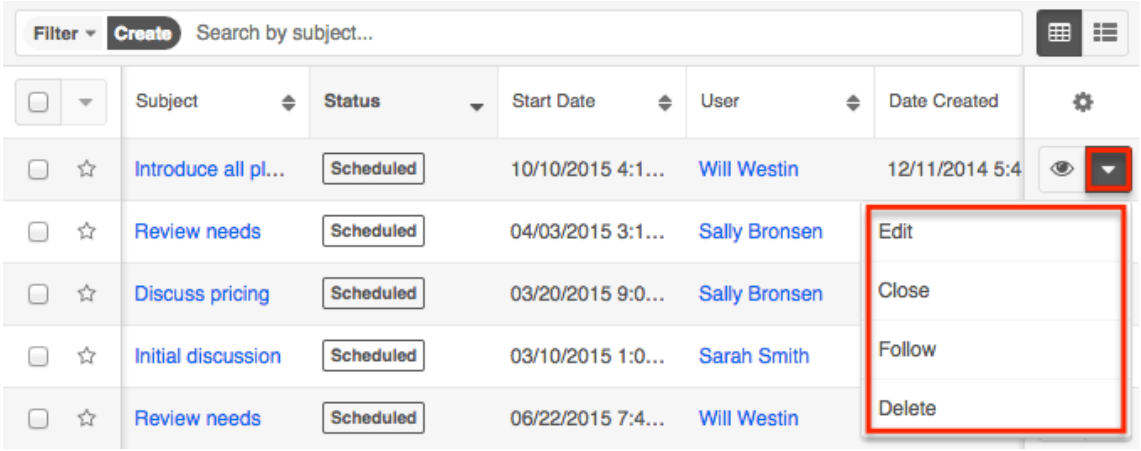



The record's data will display to the right of the list view providing key information regarding the record as well as the related activity stream information. On the upper right of the intelligence pane, there is a Left and Right arrow button that allows you to scroll through the list view's current search results by previewing the next or previous record. To close the preview, simply click the "X" on the upper right of the intelligence pane.




## Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to edit, close, follow, or delete specific records directly from the list view.



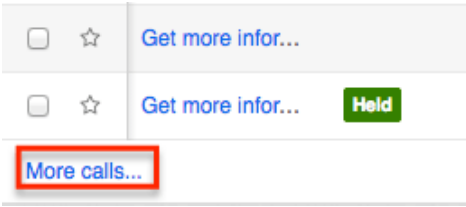

The options in the Record Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this call |
| Close | Close this call |
| | |

| | |
|---|---|
| Follow | Follow this call |
| Delete | Delete this call |

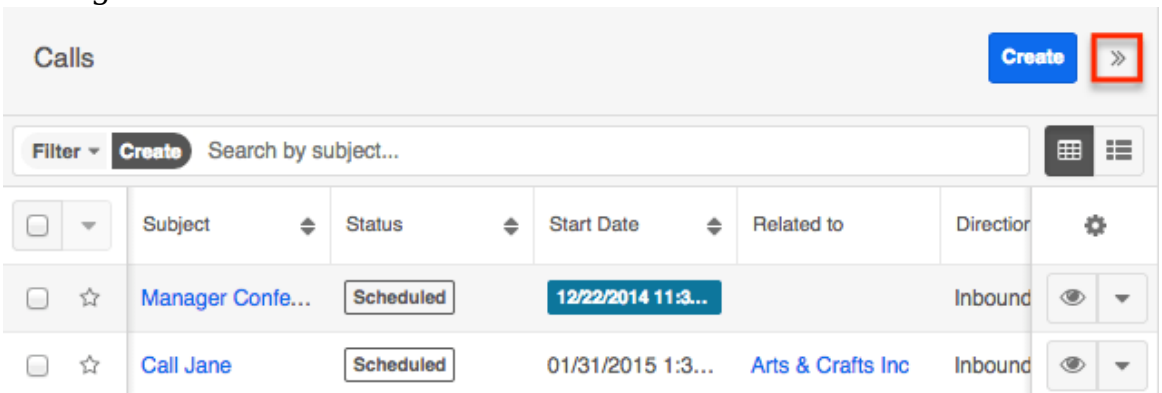
## More Calls

The list view loads an initial number of records call the current search criteria with the option to show additional results at the user's request. By default, Sugar displays 20 records per list view results set, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.To load the next set of list view results, simply click the More Calls link at the bottom of the list view.




## Right Hand Side Drawer

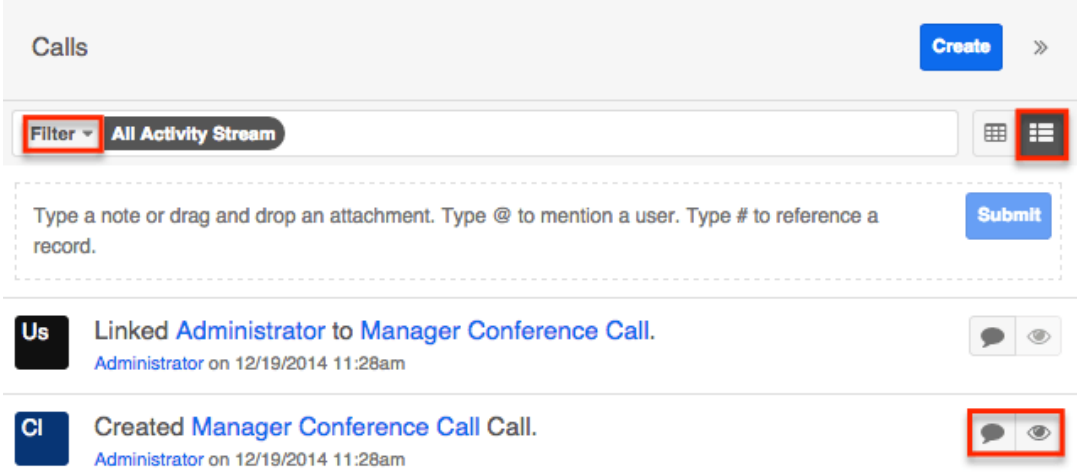
On the upper right of the Calls list view there is a double arrow icon which allows users to expand the list view to the full screen width. The intelligence pane to the right of the list view will be hidden when the list view is expanded. To reduce the list view's width and reveal the intelligence pane, simply click the double arrow icon again.




## Activity Stream

The Calls module's activity stream displays user posts made on the Calls module and record posts relevant to an individual call record. To view the module's activity stream, simply click the Activity Stream button to the right of the list view's search bar. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts using the

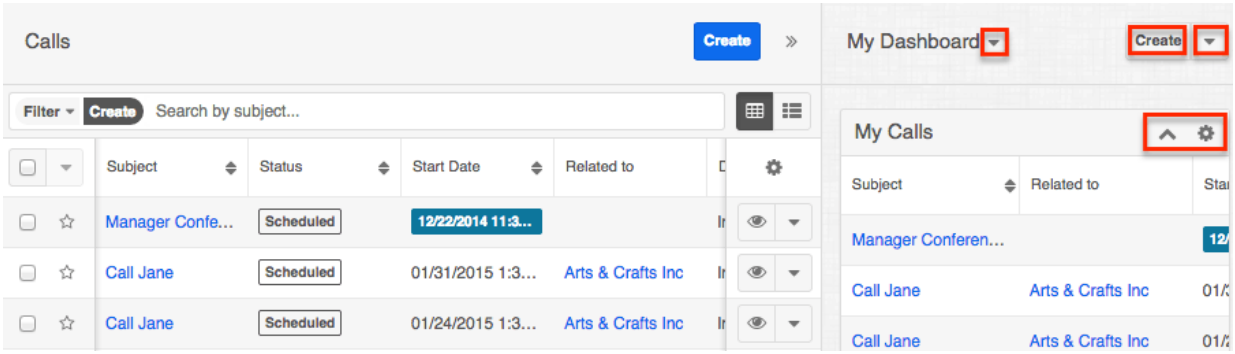
comment button to the far right of each post. You can also preview the record referenced in record posts by clicking the Preview button to the right of each post. The activity stream can be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box and selecting the desired message type.




## Intelligence Pane

An intelligence pane displays to the right of the Calls list view and provides users with valuable record information via various dashlets. The Help dashboard normally displays by default along with the List View Help dashlet and Learning Resources dashlet. The List View Help dashlet provides users with a brief introduction to the module along with a link (e.g. Accounts documentation) to the corresponding documentation in the Application guide. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may create other dashboards for use with the Calls module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets (e.g. My Calls, etc.) to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do no wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Calls module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.



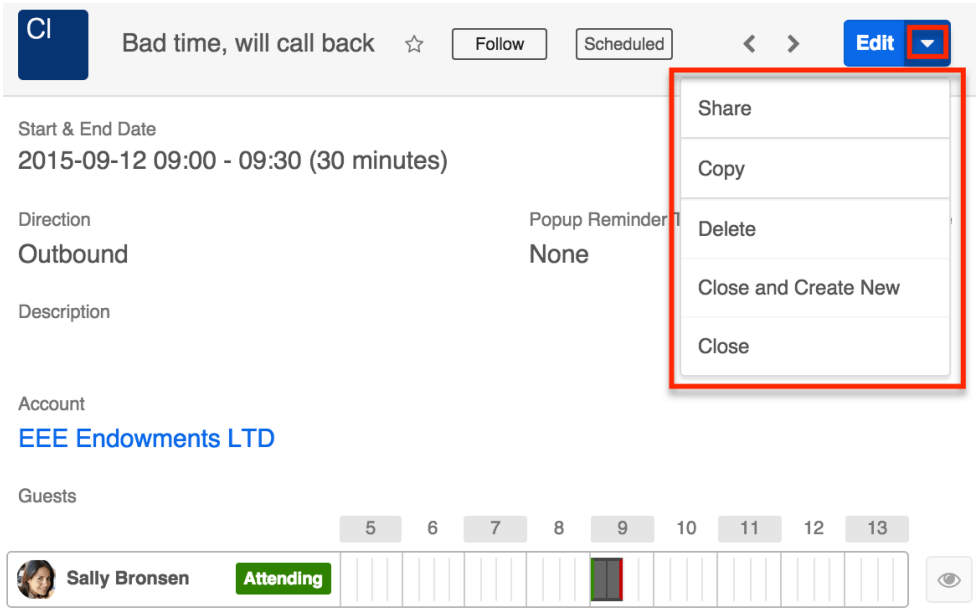

# Calls Record View

The Calls record view displays thorough call information including all relevant fields. Beneath the fields you can toggle between viewing an call's subpanels of related records (Contacts, Accounts, Opportunities, Leads, etc.) and the call's activity stream. The record view can be reached by clicking a call record's link from anywhere in the application including from the Calls list view.

Please note that you will only be able to view a call record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Users with administrator or developer access have the ability to change the record view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Actions Menu

The Actions menu on the top right of each call's record view allows you to perform various actions on the current record.



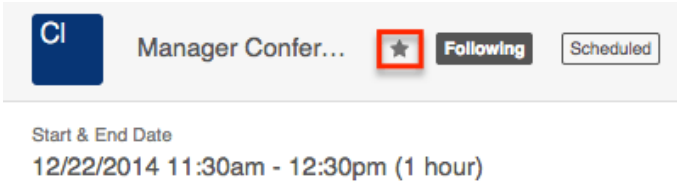

The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this call |
| Share | Share a link to this call via email |
| Copy | Duplicate this call |
| Delete | Delete this call |
| Close and Create New | Close this call as "Held" and create a new copy of the call<br><br>Note: The Close and Create New button appears as long as the status does not equal "Held". |
| Close | Close this call as "Held"<br><br>Note: The Close button appears as long as the status does not equal "Held". |

## Favorite Designation

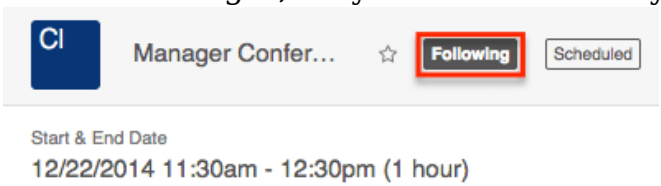
Users have the option to mark call records as favorites via the record view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the Calls module tab. In the Calls record view, the star on the right of the call's name is grey once favorited. For more information on how to mark records as favorites,

please refer to the Favoriting Calls section of this documentation.



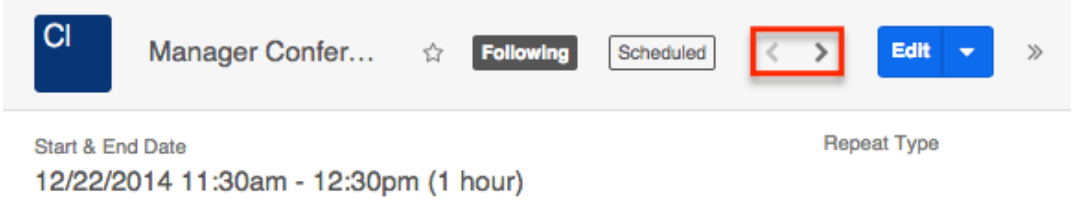

## Following Designation

Users also have the option to follow calls records via the record view or list view. This allows users to view record posts from followed calls on their Home page and Calls list view activity streams. Each user can personalize their activity stream by viewing posts for records that are most important to them. From the record view, users may follow or unfollow calls to which they have access using the Follow button to the right of the call's name. For more information on how to mark records to follow via the list view, please refer to the Record Actions Menu section of this documentation. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. If you wish to stop following a specific call record, click the Following button to revert it to gray. Should a user lose access to a record in Sugar, they will automatically stop following that record.




## Next or Previous Record

On the upper right of the Calls record view, there are two buttons that allow you to page through each call in the Calls list view's current search results. Clicking the left arrow button displays the previous call of the current search results while clicking the right arrow button displays the next call of the current search results.




## Show More

The Calls record view typically display a few key fields on the business card panel

with the option to view more fields by clicking the Show More link on the bottom left. Please note that administrators can configure what fields appear on the business card panel via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

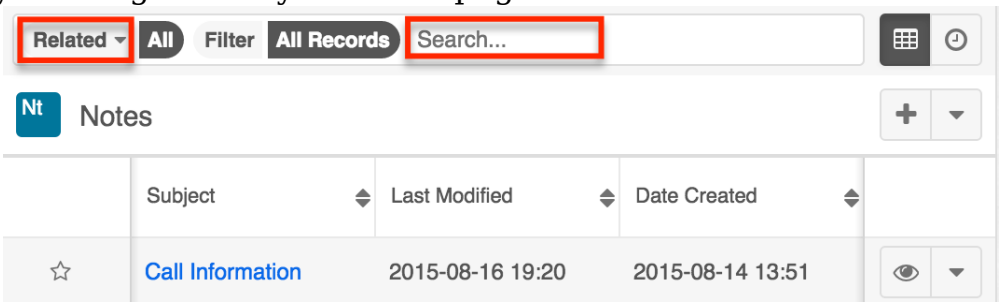



## Subpanels

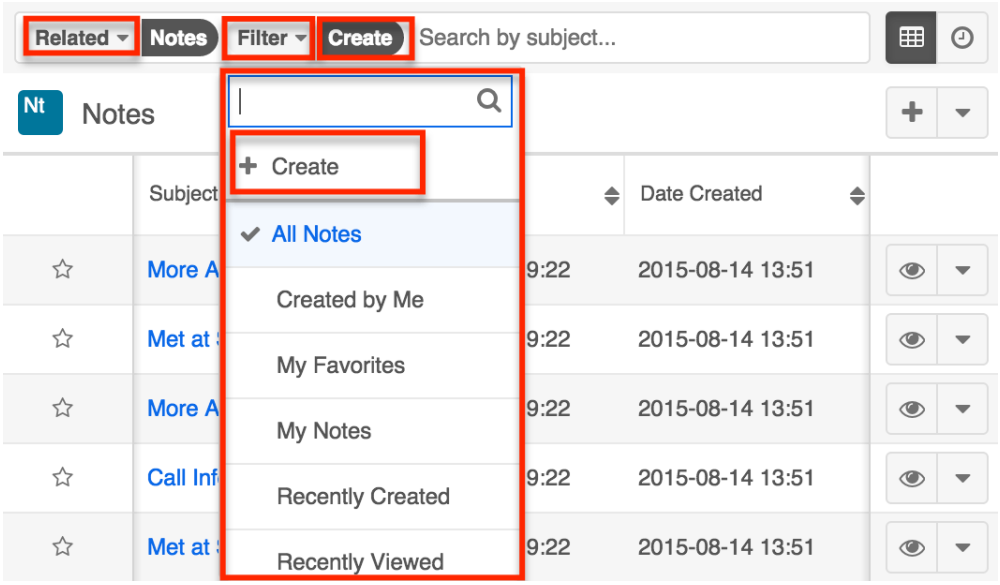
Beneath a call record's fields is the subpanel containing related records. By default, only the Notes subpanel displays in the module. Administrators can create new relationships between various modules in Sugar to create additional subpanels. For more information on creating relationships, please refer to the Studio documentation in the Administration guide. Select the Data View button to display the subpanel rather than the record's activity stream.

### Filter Options

While in Data View, all of the call record's related records will be displayed beneath the call record's fields. Users have the ability to search for records which appear in the subpanels as well as filter the view to only display a specific module (e.g. Notes). To locate a record by name, enter the keyword into the Search bar. If additional subpanels have been configured, click the Related option to the far left of the Search bar to select the module whose subpanel you wish to view. Filter and search may be combined to only display matching records within a selected module. To see all subpanels to which you have access, simply select "All" in the Related options and remove any text from the search bar. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the page. In addition, searches using the open Search box only or in combination with advanced filters (e.g. My Favorites) are preserved as well when you navigate away from the page.



When a Sidecar module (e.g. Notes) is selected from the Related options, you have the option to filter the related subpanels further using one of the available options (e.g. My Favorites, Recently Created, etc.). Please note that you can also create custom filters for related Sidecar modules. Once the related module is selected, either click the Filter option and select "Create" or click "Create" to the right of the Filter option.




Reordering Subpanels

Users can easily move subpanels to a new location on the record view by dragging and dropping the subpanel's header. The new subpanel order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared.

Note: By default, only the Notes subpanel displays in the module. Administrators can create new relationships between various modules in Sugar to create additional subpanels. For more information on creating relationships, please refer to the Studio documentation in the Administration guide.

Related Record Subpanels

Subpanels displayed on a Calls record view contain the call's related records belonging to various modules. A module's relationship to the module determines whether a related record will be displayed in the field listing or in a subpanel. For example, a call may be related to multiple notes, which means that the related notes will be displayed in a subpanel beneath the fields.

Users with administrator or developer access have the ability to change the fields (e.g. Subject, Assigned User, etc.) and labels of each subpanel by configuring the

layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.

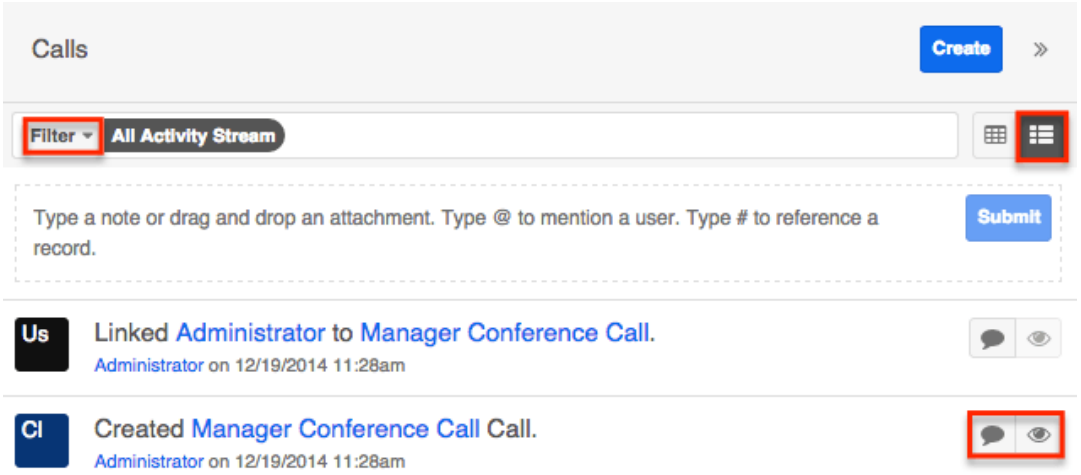
Related record subpanels allow the following operations to be performed:

- To view the details of a related record, click the record's name in the subpanel to open it in record view.
- To relate an existing record to the call, choose "Link Existing Record" from the subpanel's Action menu, then locate and select the desired record. Please note that the Link Existing Record option is not available when the relationship is required in the related module.
- To relate a new record to the call, click the Plus button to the left of the Actions menu, then complete the record view layout and click "Save".
- To preview the related record, click the Preview icon to the far right of the record's row in the subpanel.
- To inline edit the record directly from the subpanel, choose "Edit" from the Actions menu on the far right of the record's row and click "Save" to preserve the change.
- To delete the call's relationship to a record, choose "Unlink" from the Actions menu on the far right of the record's row. This removes the relationship, but does not delete the record itself. Please note that the Unlink option is not available when the relationship is required in the related module.
- To mark the record as a favorite, click the star icon to the left of the desired record's row.
- To collapse or expand the subpanel, click anywhere on the subpanel's header.
- To change the column size in the subpanel, place your cursor on the column divider and, when the Left and Right arrow appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.

## Activity Stream

The Call record view's activity stream displays user posts and record posts specific to the individual call record. To view the record's activity stream, simply click the Activity Stream button below the call's fields. Users can view all posts in the record view's activity stream even if they do not follow the record in Sugar. Please note that you must follow the record if you wish to view the record view posts via the Home page or List View activity stream. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts by clicking the Comment button to the far right of each post, entering in your comment, then clicking "Reply". You can also preview the record referenced in the record post by clicking the Preview button.The activity stream can also be filtered to only display certain messages (e.g. Messages

for Create, Messages for Update, etc.) by clicking "Filter" above the post input box then selecting the desired message type.



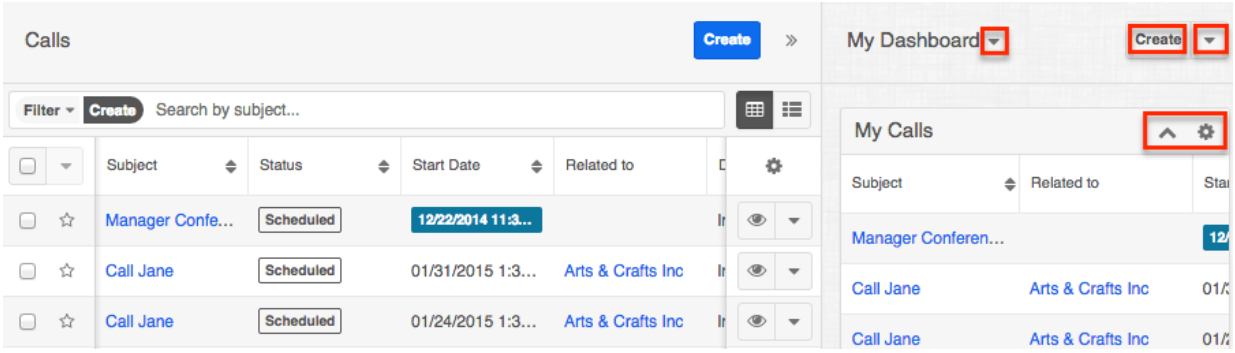

## Intelligence Pane

An intelligence pane displays to the right of the call's record view and provides users with valuable information specific to the call's sales, activities, etc. The Help Dashboard normally displays by default along with the Record View Help dashlet and Learning Resources dashlet. The Record View Help dashlet provides users with a brief introduction to the module along with some instructions to help users utilize and navigate around the record view. A link to the corresponding documentation (e.g. Calls documentation) in the Application guide is also provided within the Help dashlet. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation.

You can access the My Dashboard, which will display some stock dashlets (e.g. Planned Activities dashlet, History dashlet , etc.) by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". For example, the History dashlet displays calls and meetings that have taken place as well as related emails for the account record. By default, the Opportunity Metrics, Case Summary, News Feed, Planned Activities, and History dashlets are available in the stock dashboard called "My Dashboard". Users may choose to view any of their dashboards using the triangle to the right of the current dashboard's name and may create other dashboards for use with the Calls module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets to their dashboards.

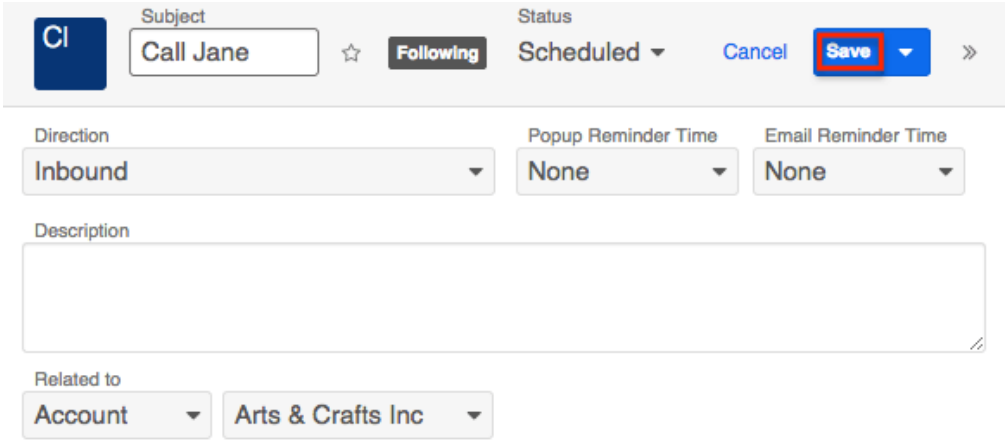
Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within

the current dashboard. You can collapse dashlets you do not wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Calls module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.




## Editing Calls

Calls may be edited at any time to update or add information to the record. You can make changes to existing call records via the Calls record view. The record view is available within the Calls module and includes all of the Call fields you should need.

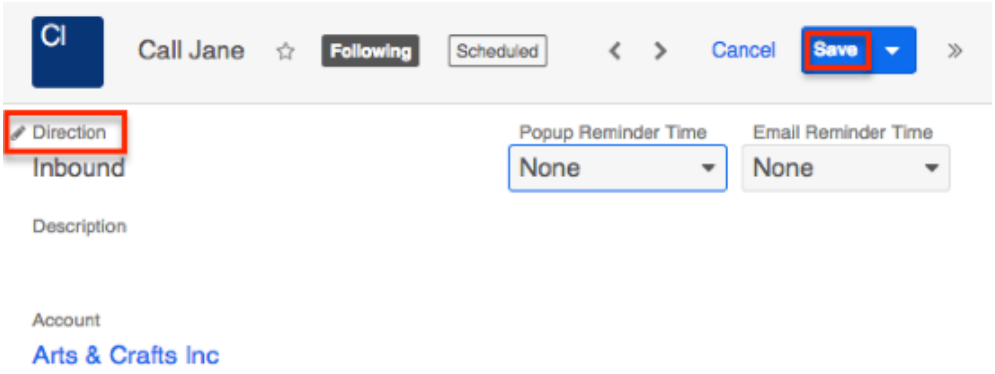



Please note that your ability to edit calls in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure the Calls record view via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

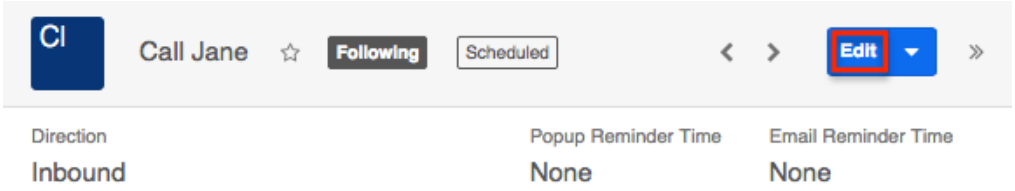
### Editing Inline Via Record View

Users can edit individual fields on the Calls record view without entering the full edit mode by clicking the field name. Fields which are available for inline editing will display a pencil icon when hovering on the field name or value. This will allow users to type or select a new value. Click "Save" to preserve the changes made to the field.



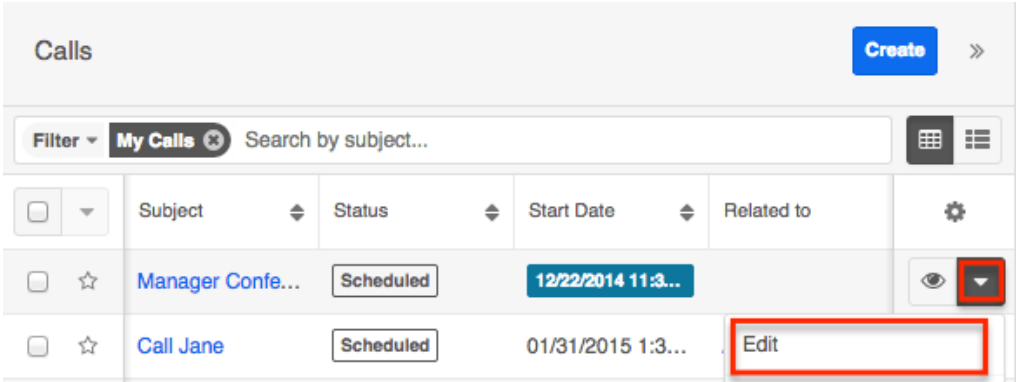

## Editing Via Record View

You can edit many call fields at once via the record view by clicking the Edit button on the upper right of the page. Once the record view layout is open, update the necessary fields, then click "Save" to preserve the changes made.

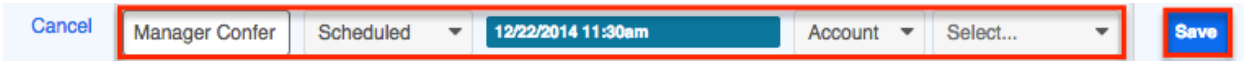



## Editing Inline Via List View

You can also edit individual fields on the Calls list view without entering the full edit mode. Click the Record Actions menu to the far right of the record's row and select "Edit".



The fields on the record's row will open up allowing user's to type or select a new value. You can click the double arrow icon on the upper right of the page to expand the list view for editing. Click "Save" to preserve the changes made to the call record.




Note: Text area fields are not inline editable from list views.

## Deleting Calls

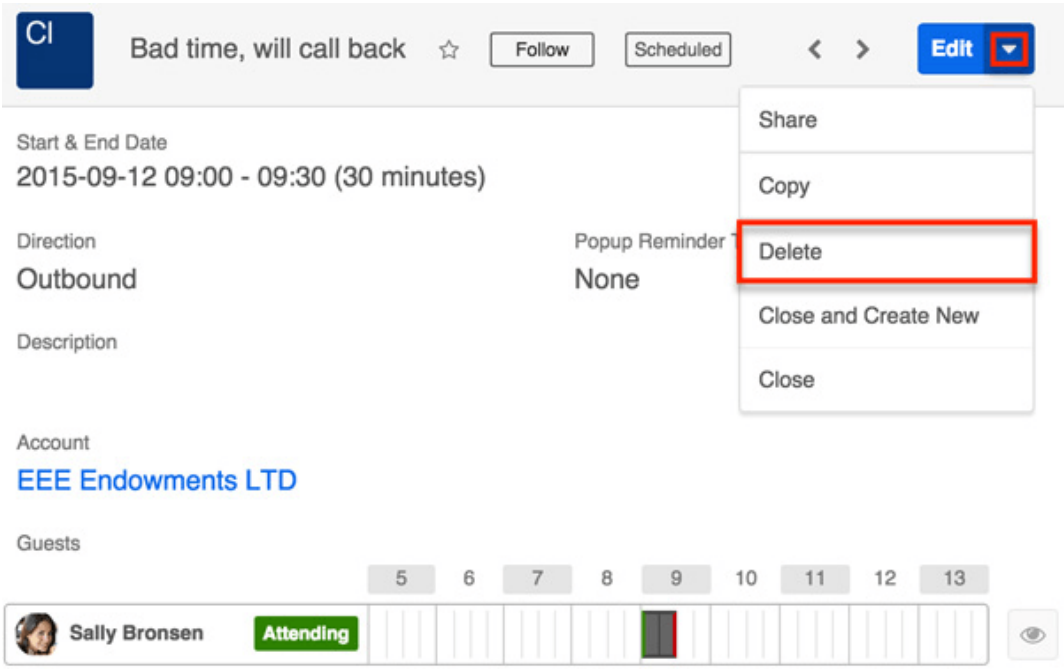
If a call record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Calls record view or list view. Deleting via the record view allows you to delete a single record while the list view allows for mass deleting multiple records at once as well as single record deletions. Deleting call records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

Please note that your ability to delete calls in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

### Deleting Via Record View

Use the following steps to delete a call record via the record view:

1. Navigate to a call's record view.
2. Select "Delete" from the Actions menu.

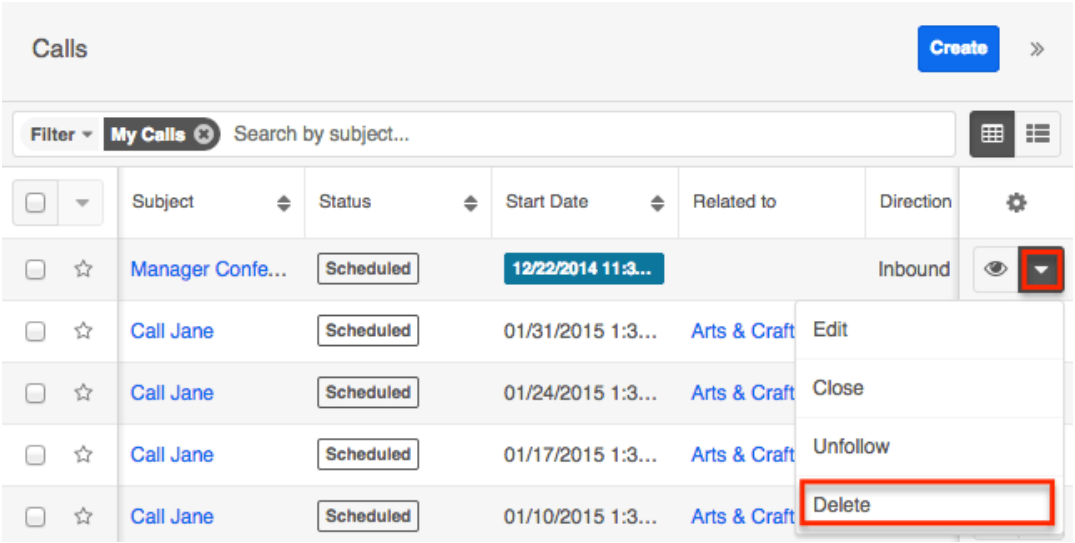



3. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

## Deleting Via List View

Use the following steps to delete a call record via the list view:

1. Navigate to the Calls list view by clicking the Calls module tab.
2. Use the Module Search to find the Call record you wish to delete.
3. Click the Record Actions Menu to the far right of the record's row and select "Delete".

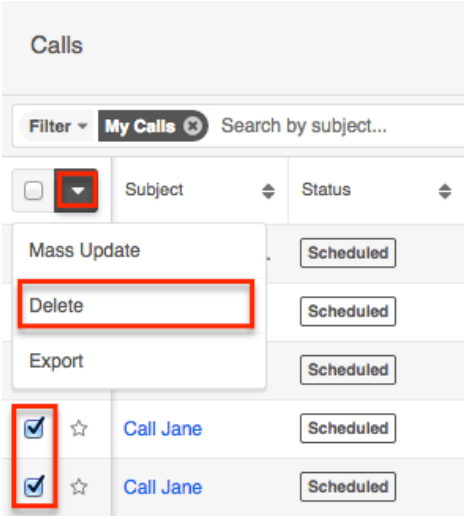



4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

### Mass Deleting Via List View

Use the following steps to delete one or more call records via the list view:

1. Navigate to the Calls list view by clicking the Calls module tab.
2. Use the Module Search to find the Call records you wish to delete.
3. Select the desired call records then choose "Delete" from the Actions menu.




4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

You can also use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to delete more than 1000 records or delete a specific group of records on the list view, please use the in module search to perform the deletions in smaller batches.

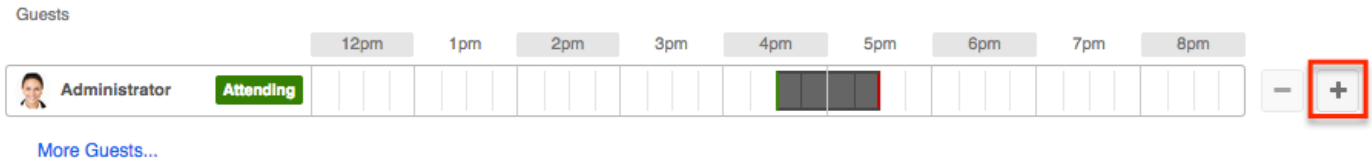
## Adding Invitees to Calls

Users have the option of adding additional invitees (e.g. Contacts, Leads, Users) to calls via the Add Invitees or Create an Invitee option in the Call's record view. Please note that the user creating the call as well as the contact or lead selected in the Related to field will automatically be added as invitees to the call. You can simply remove yourself or an attendee from the call by clicking the Remove icon ("-") in the Scheduling panel.

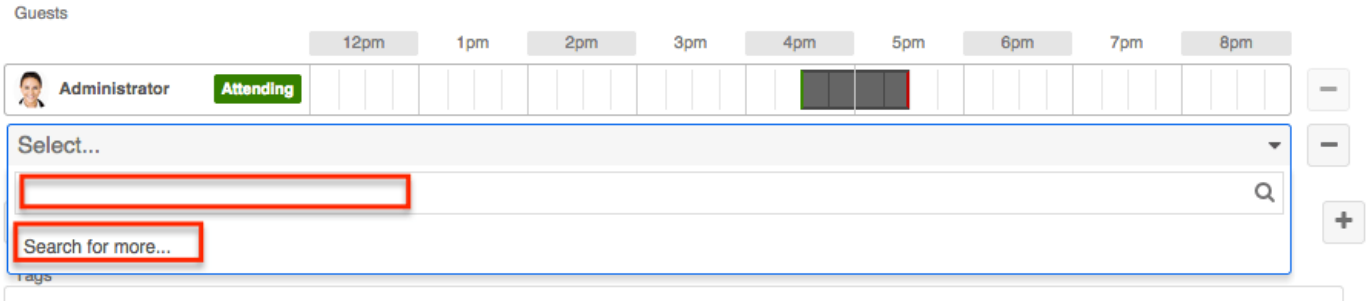
### Adding Via Add Invitees

Use the following steps to add attendees via the Add Invitees panel:

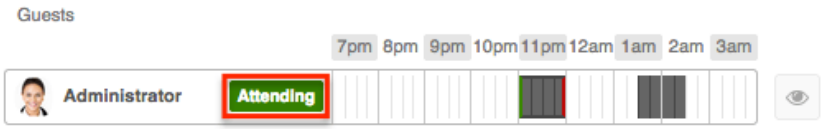
1. Navigate to a call record view.
2. Scroll to the Guests panel and select "+" located on the far right.



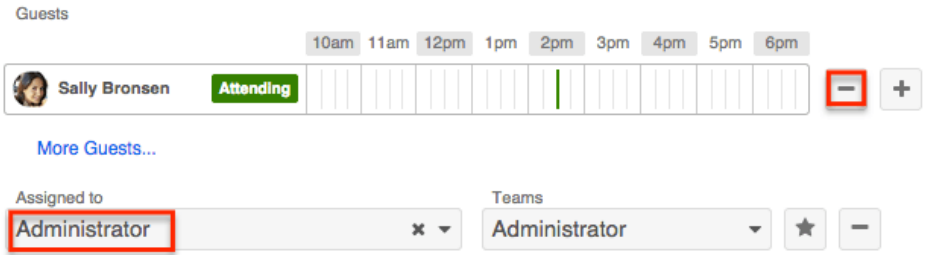

3. Type in the users or guests name via the search bar that appears or select "Search for more..." for the Contacts list view.




4. Click "Save and Send Invites".
5. Once the invitee has responded to the email invitation, the status will appear to the right of their name.



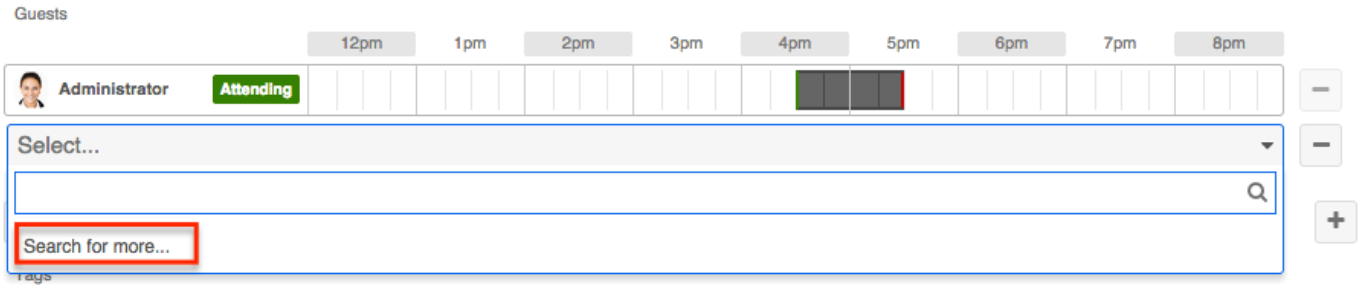

Note: The assigned user will automatically be added as a guest to the call. If the same record is reassigned, the original user will still show as a guest but can now be removed.




## Adding Via Create an Invitee

Use the following steps to add attendees via the Create an Invitee option:

1. Navigate to a call record view.
2. Scroll to the Guest panel, select "+", and then select "Search for more...".




3. Select "Create" and fill out the appropriate fields. Once completed, save the new record and Sugar will automatically attach them as a guest for the calls.

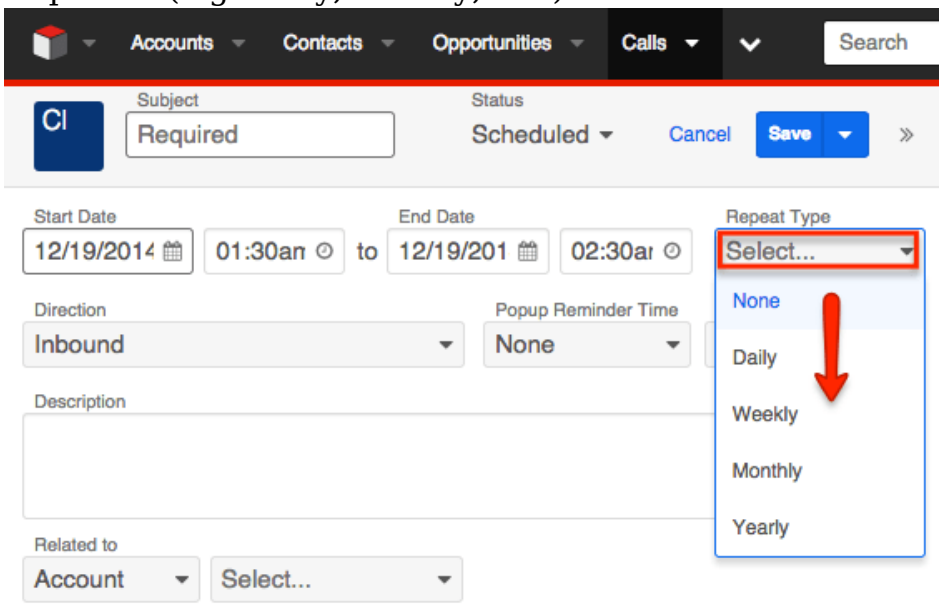
The contact or lead will appear as an invitee in the Scheduling panel in the Call's record view.

## Setting Up Recurrences

can be set as recurring events so that users do not have to create individual call records for regularly occurring events. Recurrences can be set up to occur daily, weekly, monthly, or yearly. When a recurring call is configured, individual call records are created in Sugar, so when viewing the Calls List View, all recurrences will show.

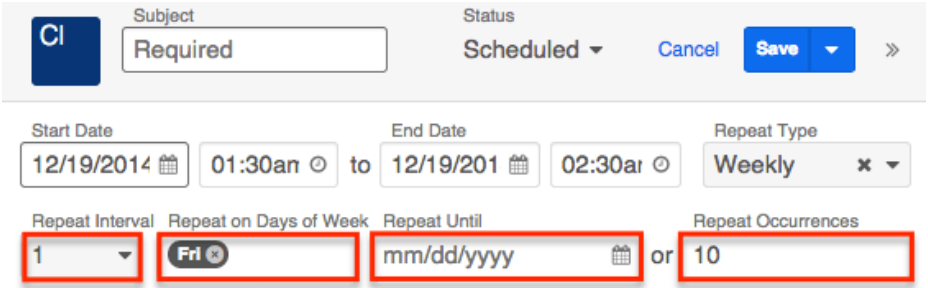
To schedule the call as recurring, follow the instructions below:

1. Navigate to the module and create a new record or edit an existing record.
2. Click the Repeat Type field and select the appropriate interval from the dropdown (e.g. Daily, Weekly, etc.).




3. When you select an interval, you must specify how often the scheduled call

will recur as well as when the date for when the last call takes place.

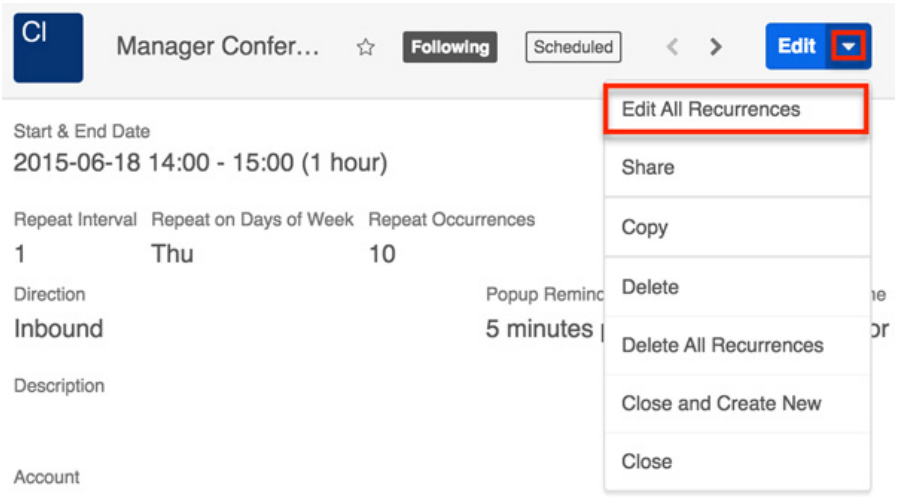



4. Once the record is saved, all recurrences will appear in the Call list view.

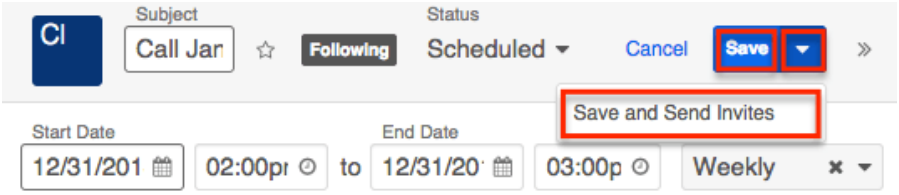
## Editing All Recurrences via Record View

Use the following steps to edit all recurrences for a call via the record view:

1. Navigate to a call's record view.
2. Select "Edit All Recurrences" from the Actions menu.




3. Edit the record. Then select "Save" or "Save and Send Invites".

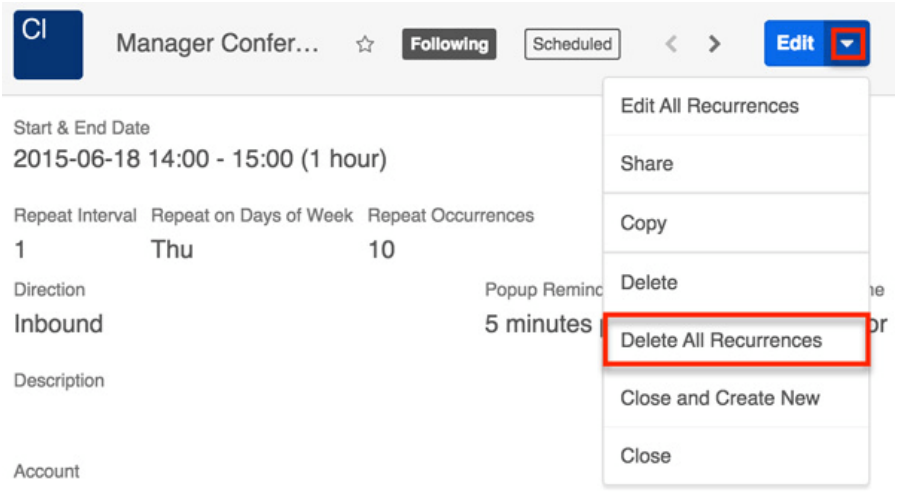



## Deleting All Recurrences via Record View

Use the following steps to delete all recurrences for a call via the record view:

1. Navigate to a call's record view.

2. Select "Delete All Recurrences" from the Actions menu.

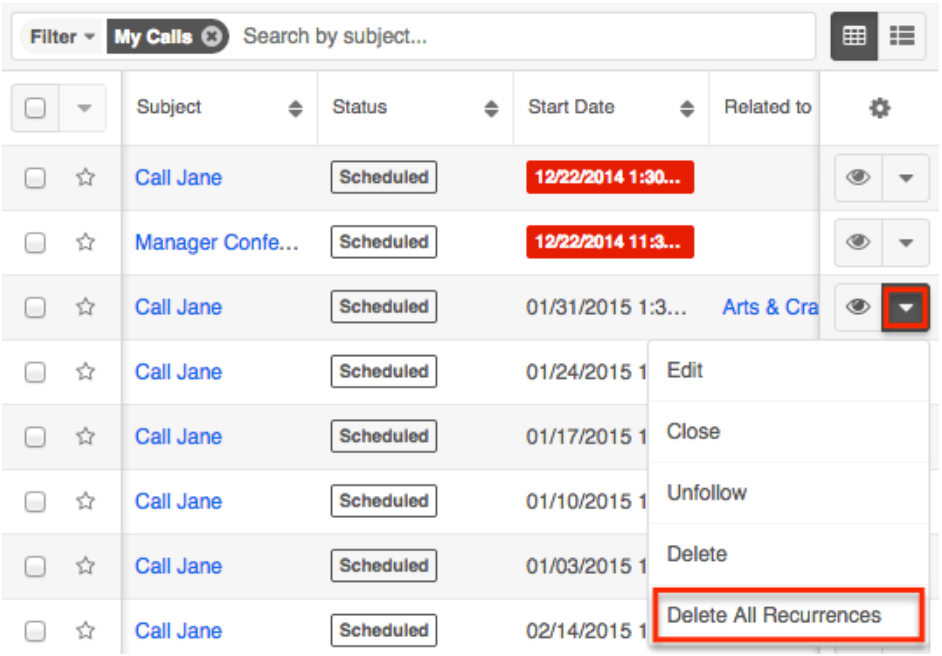



3. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

Deleting All Recurrences via List View

Use the following steps to delete all recurrences for a call via the record view:

1. Navigate to the Calls list view by clicking the Calls module tab.
2. Use the Module Search to find the Call record you wish to delete.
3. Click the Record Actions Menu to the far right of the record's row and select "Delete All Recurrences".




4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

# Adding Reminders

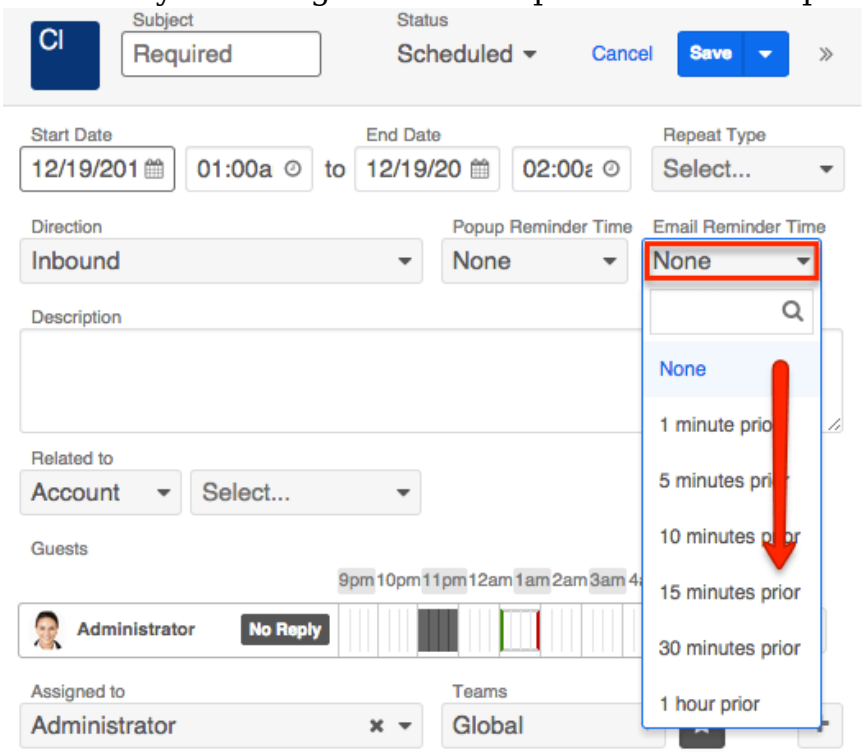
Sugar includes the ability to remind invitees when they have a call that is scheduled to begin in a given amount of time. Reminders can be sent via email to all of the invitees prior to the calls scheduled start date and time. By default, reminders have to be manually added to calls upon creating or editing the activity. Users can configure their default reminders via their User Preferences, which will automatically select the default reminder time in the Reminders field.

The instance's outbound mail server must be configured via Admin > Email Settings in order for email reminders to be sent out. For more information on setting up the system email settings, please refer to the Email documentation in the Administration guide.

## Email Reminders

Email reminders are scheduled upon creation of or while editing a call record. The email reminders are emailed to all invitees, including non-Sugar users.

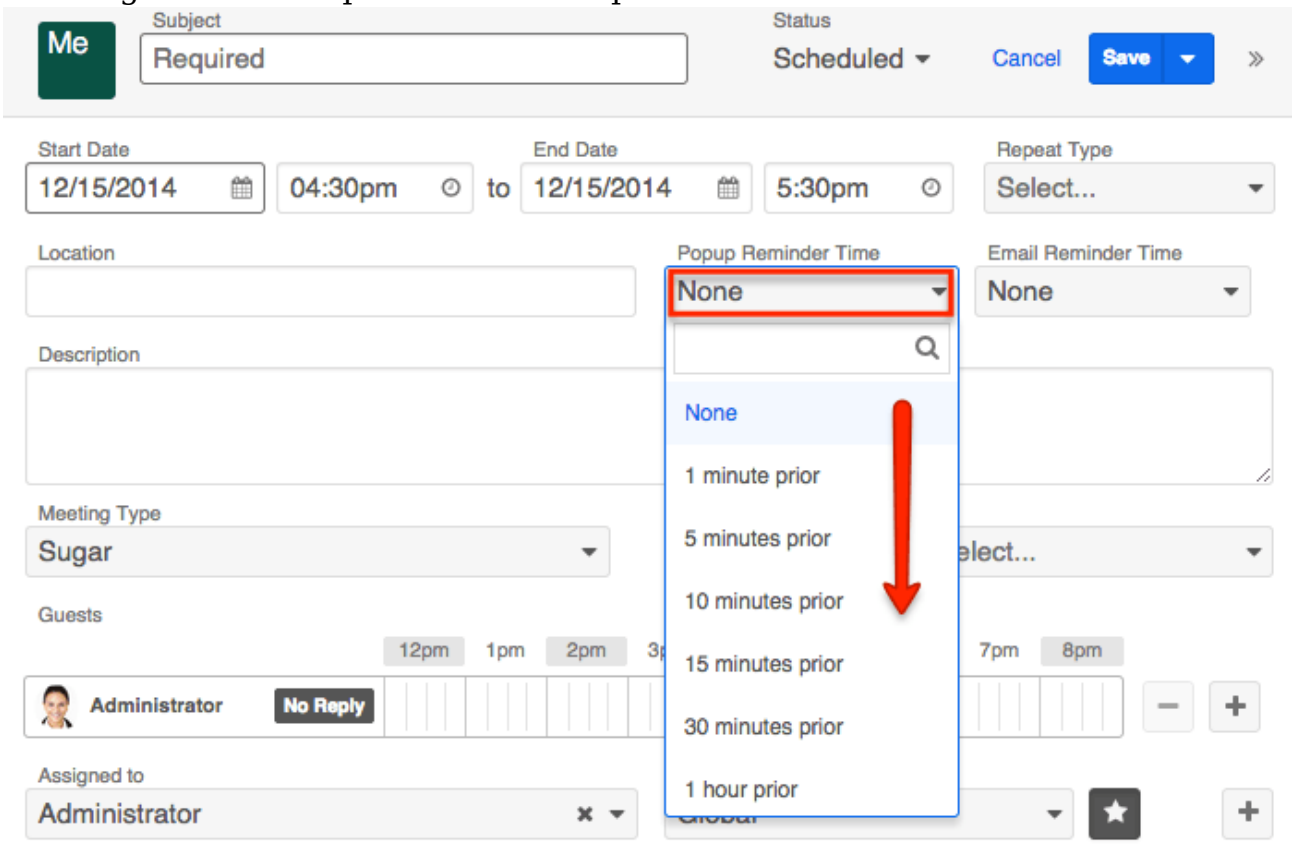
Select the Email Reminder Time field and set the time for the reminder email to be sent out by selecting one of the options in the dropdown list.




## Popup Reminders

Popup reminders are also scheduled upon creation of or while editing a call record. Popup reminders will appear for all Sugar user invitees who are logged into Sugar in an open browser window.

Select the Popup Reminder Time field and set the time for the reminder popup by selecting one of the options in the dropdown list.




## Closing Calls

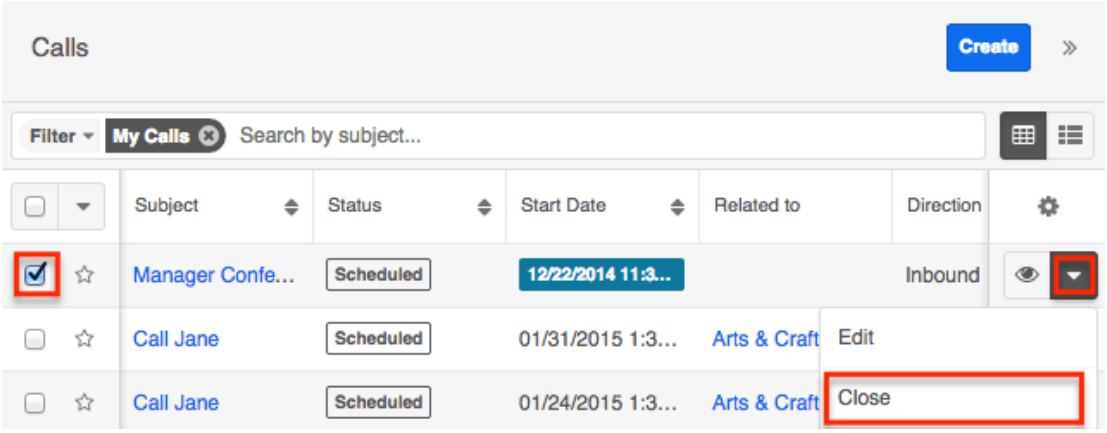
Once a call has taken place or is complete, users can edit the Status field to "Held" while on the record view. Outside of the directly editing the field, Sugar provides users with alternative options to close calls as "Held" via the list view or record view. Please note that the Close option will only appear on the list view or record view if the call currently has a status that does not equal "Held".

### Closing Via List View

Use the following steps to close a call record via the list view:

1. Navigate to a call record's list view.

2. Use the Module Search to find the Call record(s) you wish to close.
3. Click the Record Actions Menu to the far right of the record's row and select "Close".




4. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

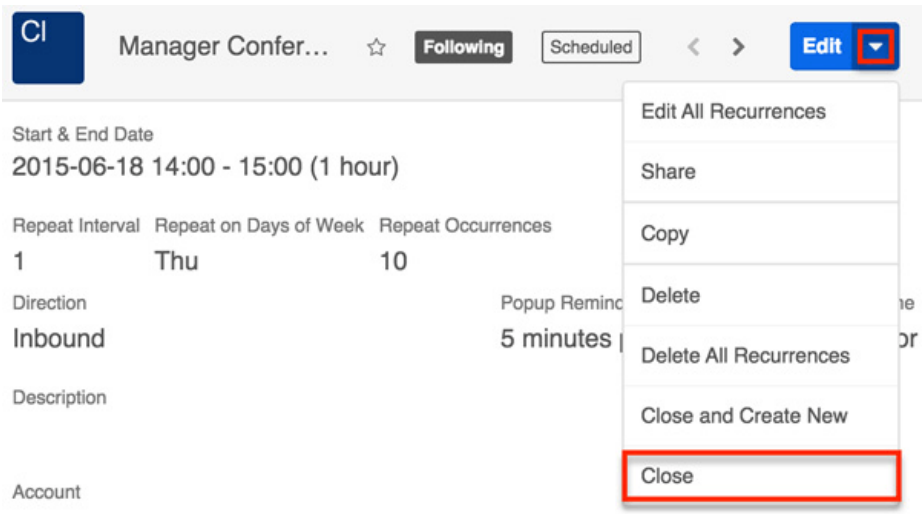
Once the call is closed, the status of the call record will change to "Held".

Please note that open or upcoming calls appear in the subpanel and the Planned Activities dashlet on the invitees (e.g. Contacts, Leads) record view. Once a call is marked as held, the call will instead appear in the History dashlet and the status will display "Held" in the Calls subpanel.

## Closing Via Record View

Use the following steps to close a call record via the record view:

1. Navigate to a call record's view.
2. Select "Close" from the Actions menu.

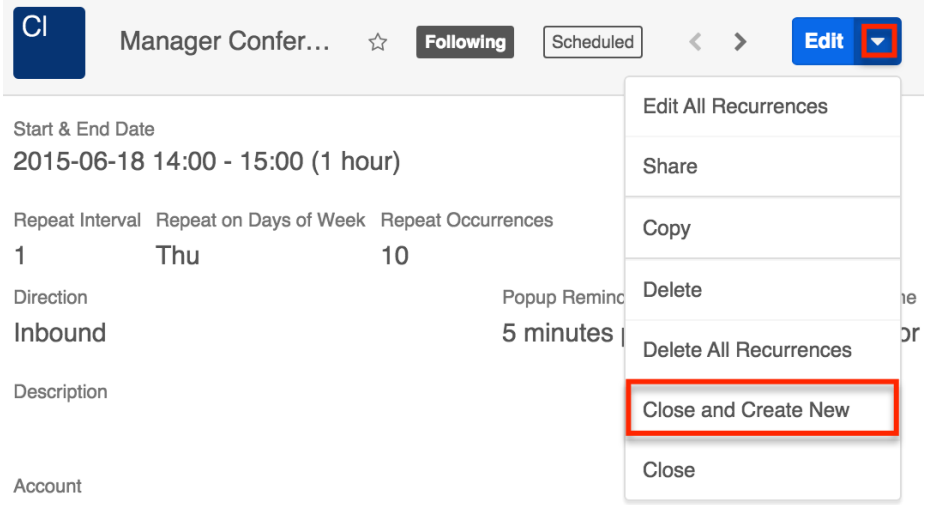



Once the call is closed, the status of the call record will change to "Held" and the

Close option will no longer appear in the Actions menu.

## Closing and Creating New Calls

The Close and Create New option in the Call record view allows you to close the current call record as "Held" and create a new copy of the call. The displayed record view is pre-populated with the original call's values except for the status, which will display "Scheduled" by default. This option may be useful if you are logging a call that has already taken place and need to create a new call record for the same contact, lead, etc. using similar information.

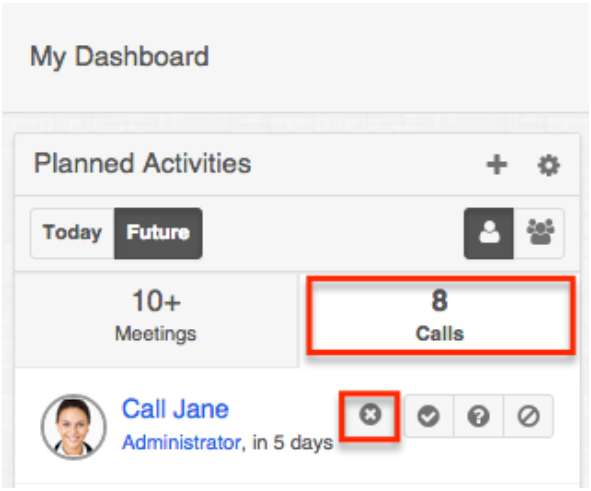



Please note that the Close and Create New option will only appear if the call currently has a status that does not equal "Held".

## Closing Via Dashlet

Use the following steps to close a call record via the Planned Activities dashlet:

1. Navigate to a module record view's (e.g. Contacts) intelligence pane.
2. Click the Calls tab on the Planned Activities dashlet then locate a call record to close.
3. Click the Held button to the right of the call's row in the dashlet.



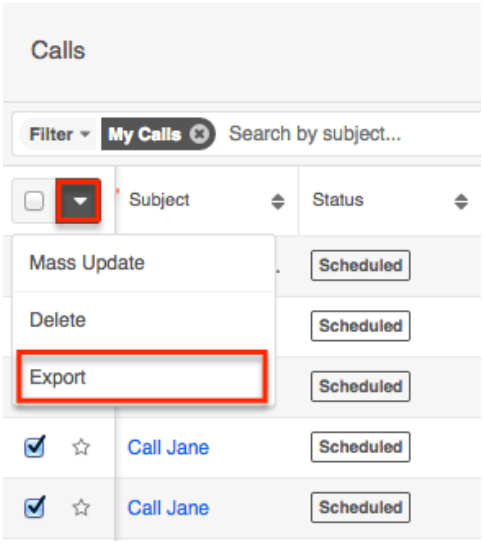

4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

Once the call is closed, the call will appear in the History dashlet on the record's intelligence pane and the status will display "Held" in the Calls subpanel.

## Exporting Calls

Sugar's Export option allows users to download all fields for the selected calls to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Call data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered calls back into Sugar. For more information on updating existing records via import, please refer to the Import documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of call records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Calls may be exported from the Calls list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for calls and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.




Please note that your ability to export calls from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

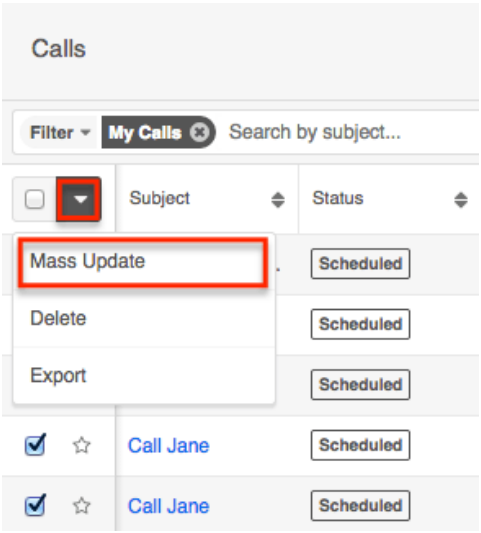
## Mass Updating Calls

Mass Updating allows users to make the same change to multiple call records at once from the Calls list view. Users with administrator or developer level access can control which fields are available to change during mass update via Admin > Studio. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide. You can use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to update more than 1000 records or update a specific group of records on the list view, please use the filter option in module search to perform the updates in smaller batches.

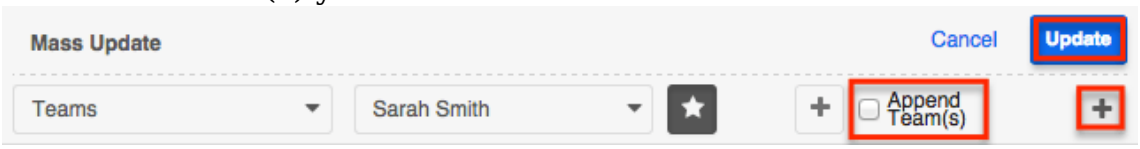
Please note that your ability to mass update calls may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

Use the following steps to mass update call records from the list view:

1. Navigate to the Calls list view by clicking the Calls module tab.
2. Use the list view's Module Search to identify calls you wish to modify.
3. Select the desired calls then choose "Mass Update" from the Actions menu.




- To add additional fields for mass update, click the Plus icon to the right of the dropdown list.
- Note: For the Teams field, mark "Append Team(s)" to add the teams specified here to any existing team assignments. Not marking the checkbox will replace the existing team assignment with the new one.The Mass Update panel will appear below the search bar. Set values for the field(s) you wish to alter.




5. Click "Update" to save the changes to all of the currently selected call records.

Note: The available fields for Mass Update for the Calls module are Assigned to, Related to, Teams, and Status.

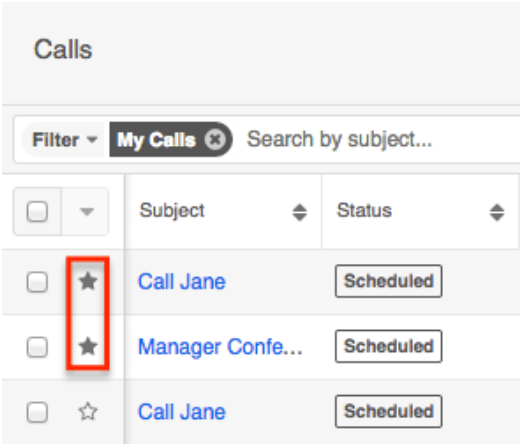
## Favoriting Calls

Each Sugar user has the option to designate their own favorite calls which are important or will be viewed often so that they can easily be accessed via search or from the Calls module tab. Once records are marked as favorites, select "My Favorites" from the Filter option next to the Search bar to retrieve your favorites or select from your most recent favorites directly from the Calls module tab.

### Favoriting Via List View

Use the following steps to mark records as favorites via the Calls list view:

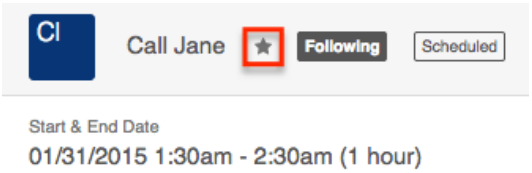
1. Navigate to the Calls list view by clicking the Calls module tab.
2. Use the Module Search to find the Calls records you wish to mark as favorites.
3. Mark the star icon on the left of each desired call's row.
4. To remove the call as a favorite, click the star again to revert it to white.




## Favoriting Via Record View

Use the following steps to mark records as favorites via the Calls record view:

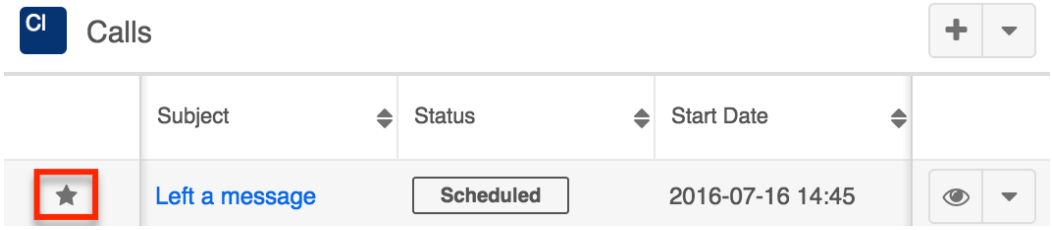
1. Navigate to a call's record view.
2. Click the star icon to the right of the call's name in the upper left of the record view to designate it as a favorite.
3. To remove the call as a favorite, click the star again to revert it to white.




## Favoriting Via Subpanel

Use the following steps to mark call records as favorites via the subpanel in related modules:

1. Navigate to a related module's record view.
2. Click the star icon to the left of the desired record's row in the Calls subpanel.




3. To remove the call as a favorite, click the star again to revert it to white.

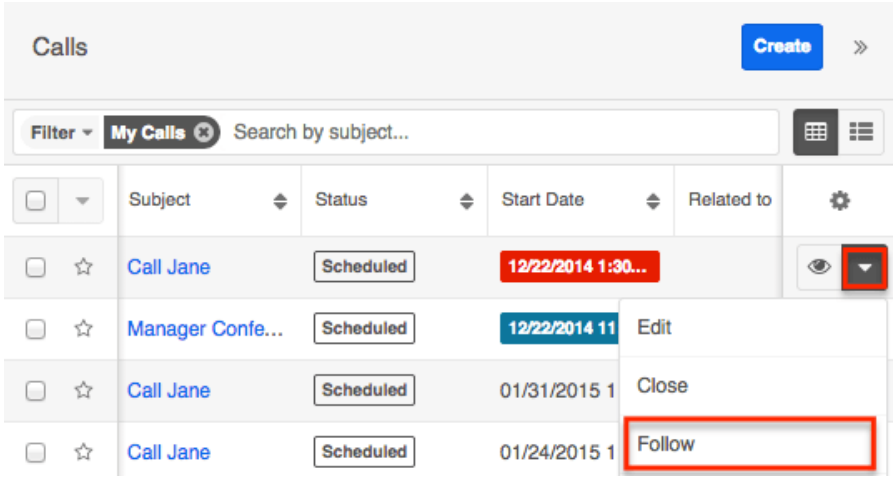
## Following Calls

Users can also choose to follow specific call records to which they have access to in Sugar by clicking the Follow button to the right of the call's name. This allows each user to personalize their activity stream by specifying which records' posts should appear on the activity streams displayed on their Home page and Calls list view. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. Should a user lose access to a record in Sugar, they will automatically stop following that record.

### Following Via List View

Use the following steps to mark a record to follow via the Calls list view:

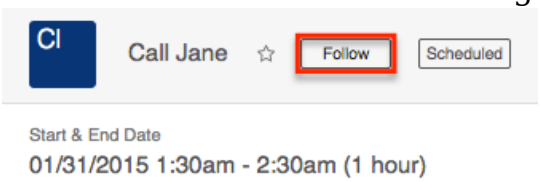
1. Navigate to the Calls list view by clicking the Calls module tab.
2. Use the Module Search to find the Call records you wish to follow.
3. Click the Record Actions menu to the far right of the records row and select "Follow".
4. To stop following the call, click the Record Actions menu then select "Unfollow".



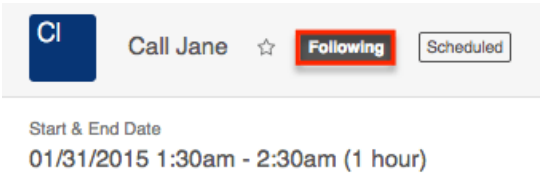
### Following Via Record View

Use the following steps to mark a record to follow via the record view:

1. Navigate to an record view.
2. Click the Follow button to the right of the call name.

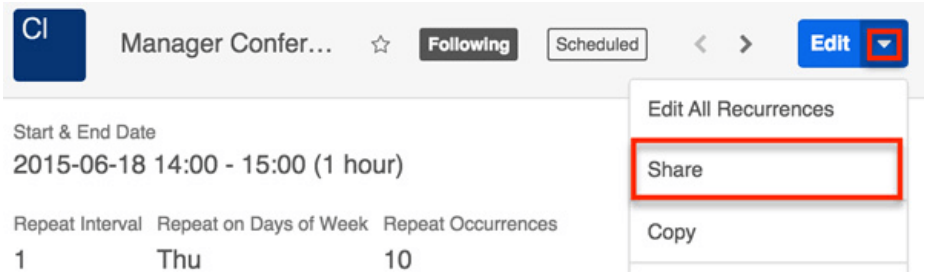



3. To unfollow the call, click the Following button again to revert it to gray.




## Sharing Calls

Individual Call records can be shared with other users in your organization by sending an email with the record's link directly from the record view. In the call's record view, select "Share" from the Actions menu which will open a Compose Email window including the URL of the call record. Enter the recipient(s) email address in the To field then click "Send".




Users can simply click the link in the email to access the call record in Sugar. Please note that the user must be logged into Sugar in order to access the record. Users will only be able to view the shared record as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

Last Modified: 03/08/2016 03:17pm

# Meetings

## Overview

Sugar's Meetings module consists of open, upcoming, or closed meeting records logged by users in your organization. There are various ways you can create meetings in Sugar such as via the Meetings module, Calendar module, importing meetings, etc. Users can also schedule meetings via the Activities subpanel (for Legacy modules) or Planned Activities dashlet (for Sidecar modules) on related module records (e.g. Contacts, Accounts, Leads, etc.), which automatically creates a relationship between both records. Once the meeting record is created, you can view and edit information pertaining to the meeting via the Meetings record view. This documentation will cover how to use the Meetings module as well as the various actions and options available from within the module.

## Meeting Fields

The Meetings module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

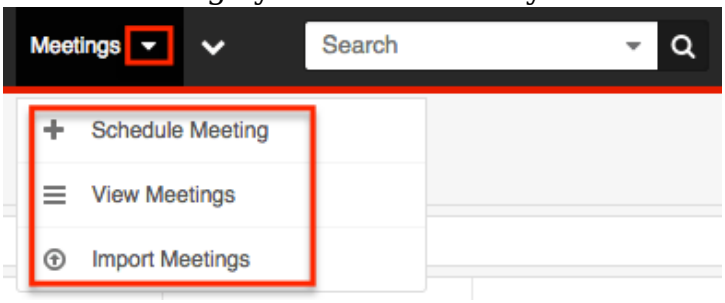
| Field | Description |
|---|---|
| Assigned To | The Sugar user assigned to the meeting |
| Created By | The Sugar user who created the meeting |
| Date Created | The date the meeting record was created |
| Date Modified | The date the meeting record was last modified |
| Description | A description or other information about the meeting |
| Display URL | The URL to access the meeting hosted by an external application (e.g. WebEx, GoToMeeting, etc.)<br><br>Note: This is a dependent field, which will appear when a value other than |

| | |
|---|---|
| | "Sugar" is selected as the meeting type. |
| Email Reminder Time | Trigger a reminder email to all meeting invitees a specified time prior to the meeting's start time |
| End Date | The end date and time of the meeting |
| Location | The meeting location |
| Meeting Password | The password to access the meeting via WebEx, GoToMeeting, etc.<br><br>Note: This is a dependent field, which will appear when a value other than "Sugar" is selected as the meeting type. |
| Meeting Type | The application (e.g. Sugar, WebEx, GoToMeeting, etc.) hosting the meeting<br><br>Note: External meeting accounts (e.g. WebEx, GoToMeeting) are added to the Meeting Type field when users connect to their account via the External Accounts tab in their user preferences. For more information on connecting to external applications, please refer to the External Accounts Tab section in the Getting Started documentation. |
| Meeting Update Sequence | Meeting update sequence for meetings as per iCalendar standards |
| Modified By Name | The name of the Sugar user who last modified the meeting record |
| Outlook ID | The Outlook appointment item ID when the Sugar Plug-in for Microsoft Outlook syncs an Outlook appointment |
| Popup Reminder Time | Trigger a reminder popup alert to all Sugar user invitees a specified time prior to the meeting's start time.<br><br>Note: Users must be logged into Sugar in an open browser window in order to receive the popup reminder. |
| Related to | The related module record associated to the meeting |
| Start Date | The start date and time for the scheduled meeting |

| | |
|---|---|
| Status | The current status (e.g. Scheduled, Held, Canceled) of the meeting |
| Subject | The subject of the scheduled meeting |
| Teams | The Sugar team(s) assigned to the meeting record |

## Meetings Module Tab

The Meetings module tab is typically found by clicking the arrow to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Meetings" to access the list view. Once the Meetings tab displays on the navigation bar, you can click the triangle within the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of meetings you last viewed in the module. The Favorites menu displays the list of meetings you most recently marked as favorites in the module.




The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|---|---|
| Schedule Meeting | Opens the record view in edit mode to create a new meeting |
| View Meetings | Opens the list view layout to search and display meetings |
| Import Meetings | Opens the import wizard to create or update meetings using external data |

If you do not see the Meetings module tab in Sugar, please check the following:

- The Meetings module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Meetings module in the Hide Modules list, simply move it to the Display Modules list. For more information on

hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Meetings module for your entire Sugar instance. Reach out to your Sugar administrator to have the Meetings module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

## Creating Meetings

There are various methods for creating meetings in Sugar including via the Meetings module, Calendar module, quick create, duplication, and import. The record view opens in edit mode when creating the meeting directly from the Meetings menu, Quick Create menu , and Calendar module and includes all of the relevant fields for your organization. When using quick create to make a meeting while viewing an existing record of another module, Sugar automatically creates a relationship between both records. For example, if you are viewing a contact or lead record (e.g. John Smith) and create a new meeting via their record view, the Related To field in the meeting record will automatically populate to "John Smith", thus creating the relationship and adding him as an invitee, as well as adding his associated account. Please note that if a meeting is created through the subpanel in a contact or lead record, they can not be removed as an invitee during the creation process. The record view layout can be configured by administrators via Admin > Studio.

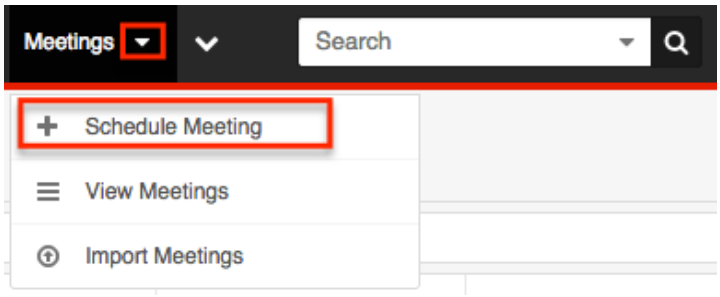
For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

### Creating Via Meetings Module

One of the most common methods of meeting creation is via the Meetings module using the Schedule Meeting option in the module tab. This opens up the record view in edit mode which allows you to enter all of the relevant information for the meeting.

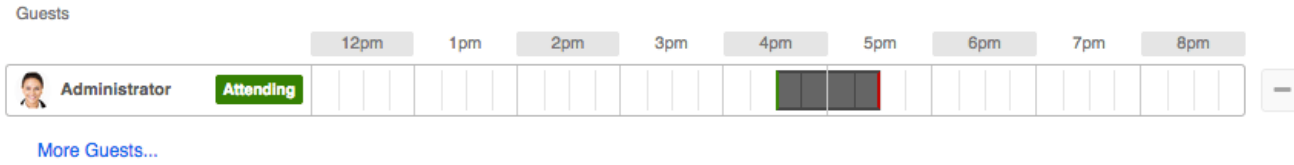
Use the following steps to create a meeting via the Meetings module:

1. Click the triangle in the Meetings module tab to open the Actions menu and select "Schedule Meeting".

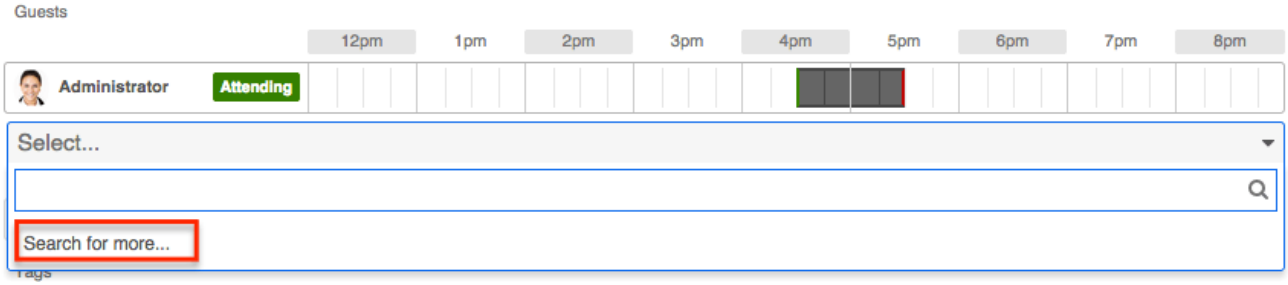



2. Enter appropriate values for the fields in the record view. All required fields are marked with a red asterisk and must be completed prior to saving.
3. To set a reminder for invitees, select a time in the Email Reminder Time or Popup Reminder Time field. Refer to the Adding Reminders section of this documentation for instructions on how to set up a reminder.
4. To schedule the meeting as recurring, click the Repeat Type field and select the appropriate interval from the dropdown (e.g. Daily, Weekly, etc.). Refer to the Setting Up Recurrences section of this documentation for instructions on setting up recurrence meetings.

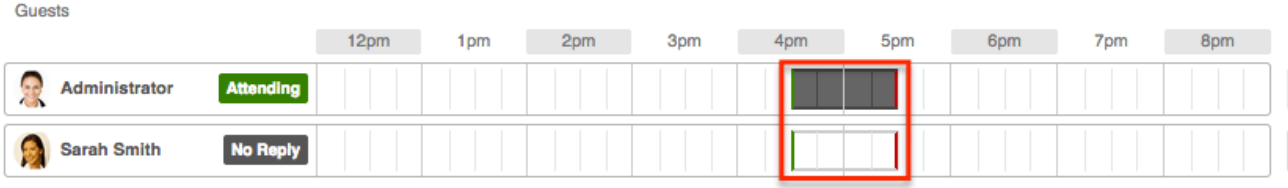
    - To add invitees (e.g. Contacts, Leads, and Users) to the meeting, scroll to the Guests panel and select "+" located on the far right.



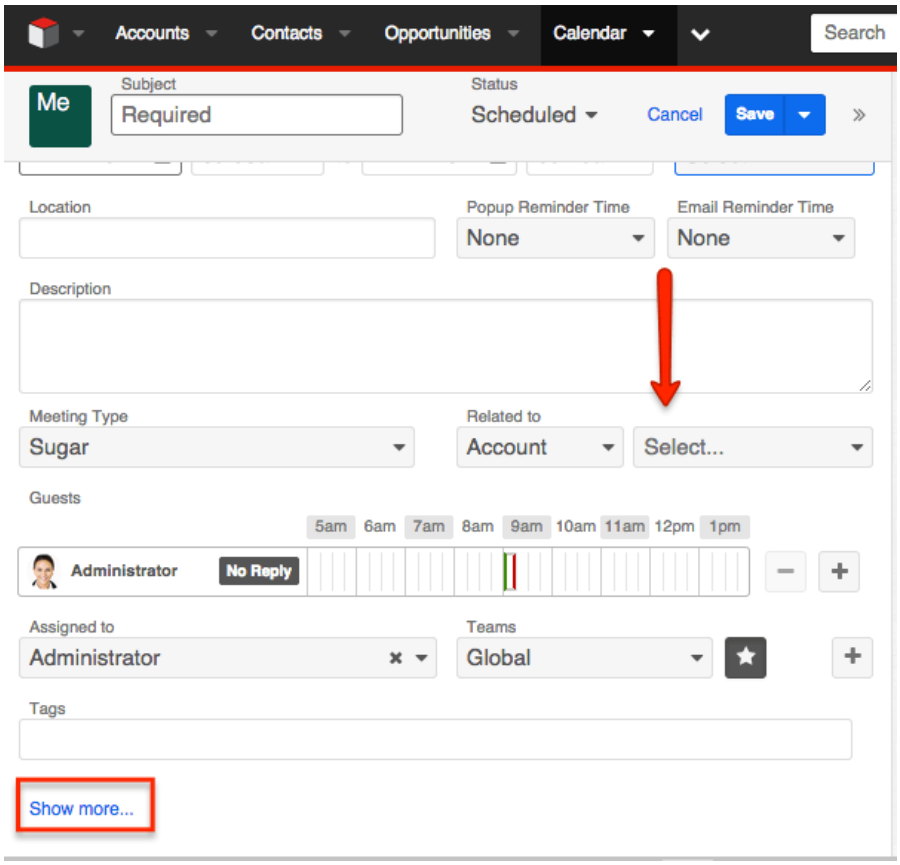

    - To create and add an invitee, scroll to the Guest panel, select "+", and then select "Search for more...".



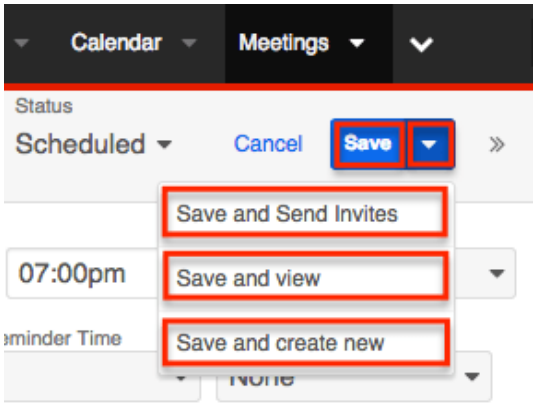

    - The list of all invitees will appear in the Scheduling panel. The duration of the meeting will be indicated by a green line (start time) and red line (end time). The Scheduling panel will display any busy times (e.g. meetings already scheduled) by blocking it out in blue, and any scheduling conflicts with other meetings will be blocked out in brown.




6. If additional fields are desired than those initially displayed, scroll down and click "Show more...".

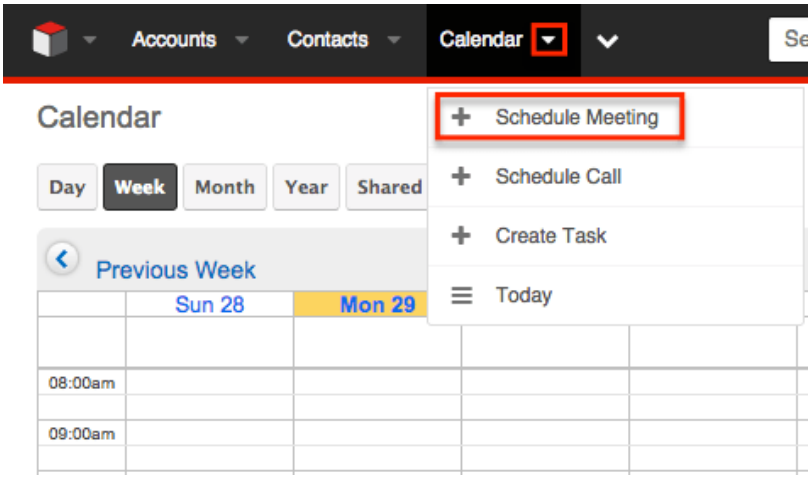



7. Once all the appropriate information is entered, click "Save", "Save and Send Invites", or one of the other save options.
    - Save : Saves the meeting record but does not send an email invite to invitees, and takes the user to the Meetings list view.
    - Save and Send Invites : Saves the meeting record and sends an email invite to invitees. The invitees will be able to accept, tentatively accept, or decline the scheduled meeting via the email invite.
    - Save and view : Saves the meeting record and the record view appears.
    - Save and create new : Saves the meeting record and opens a new, blank record view in edit mode where the user can create another record.




## Creating Via Calendar

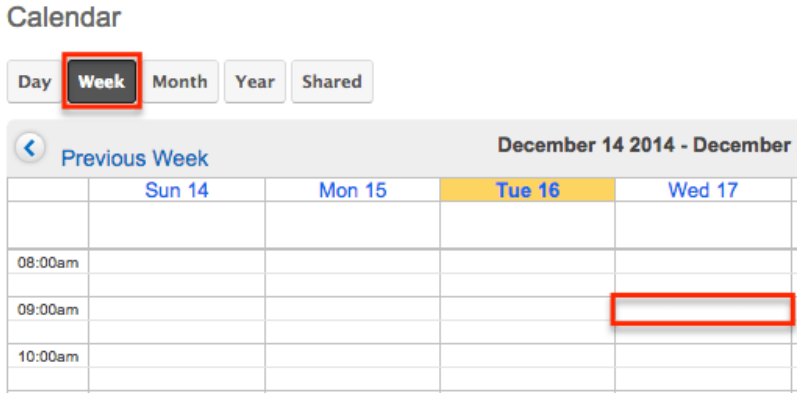
There are two methods of creating meetings in the Calendar module. The first method is to create a meeting via the Schedule Meeting option in the Calendar module tab. This will open up the Meetings record view in edit mode to create a new meeting record. For more information on creating meetings via the Meetings module, please refer to the Creating Via Meetings Module section of this documentation.




The second method is to create the meeting directly via the user's Sugar calendar.

Use the following steps to create a meeting via the Calendar module:

1. Click the Calendar module tab.
2. On the calendar view, click the cell corresponding to the date and time you wish to schedule the meeting. You can choose to view the calendar by Day, Week, Month, Year, or Shared. For more information on viewing the shared calendar, please refer to the Calendar documentation.

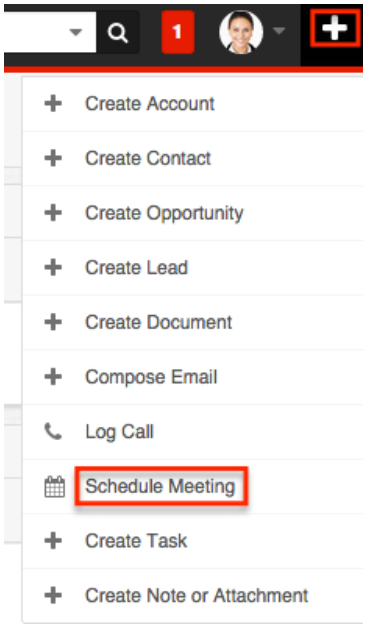
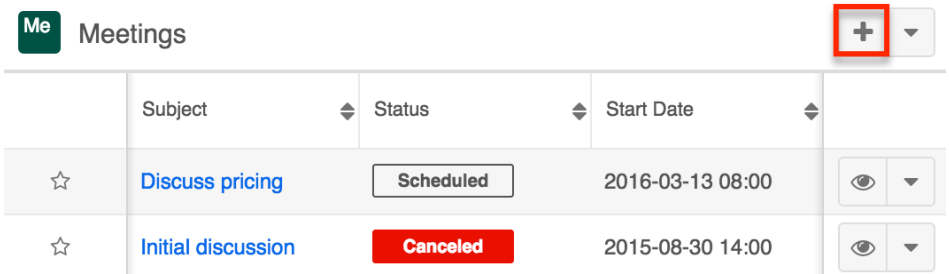


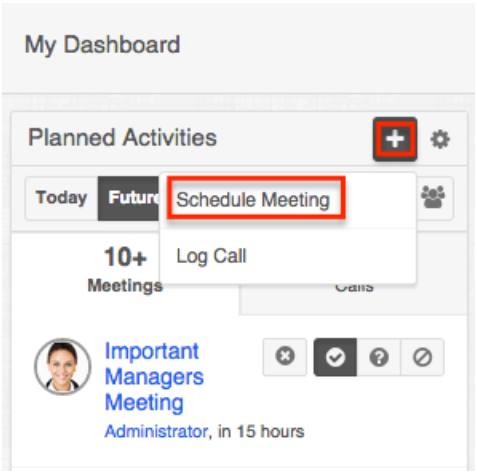

3. Refer to step 2 and beyond in Creating Via Meetings Module above for additional instructions about creating meeting records.

## Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the Plus button on the upper right of all Sugar pages to access the menu. You can also quick create a meeting from any Activities subpanel (Legacy modules), Meetings subpanel (Sidecar modules), or Planned Activities dashlet (Sidecar modules) on related module records. When quick creating meetings, the Related to field is automatically populated with the module and record you are currently viewing.

Use the following steps to create a meeting via the Quick Create menu as an example:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Schedule Meeting". You can also quick create meetings using the following methods:
   From Quick Create menu:
   
   
   From Meetings subpanel:
   
   
   From Planned Activities dashlet:



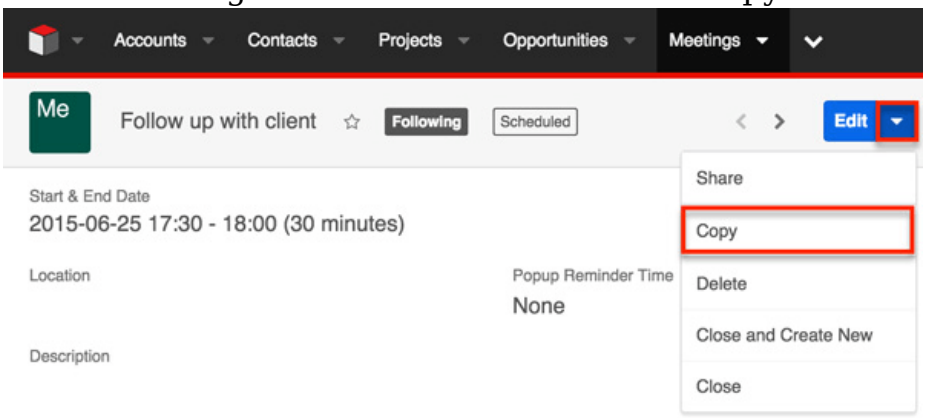

2. Refer to step 2 and beyond in Creating Via Meetings Module above for additional instructions about creating meeting records.

## Creating Via Duplication

You can also create a new meeting by duplicating an existing meeting record. The duplicate option is useful if the meeting you are creating has similar information to an existing meeting. Please note that existing subpanel relationships for the original meeting record will not carry over to the duplicated meeting record.

Use the following steps to create a meeting by duplicating an existing record:

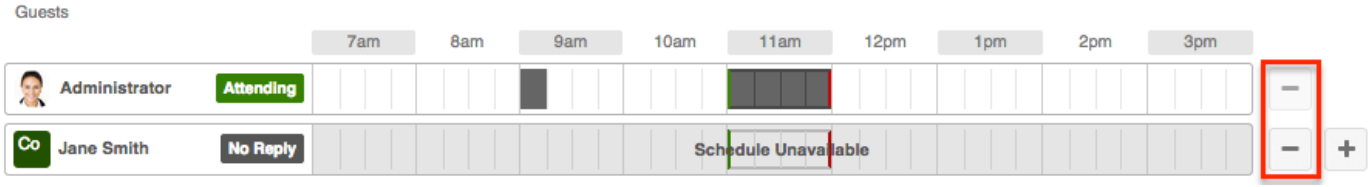
1. Navigate to a meeting's record view.
2. Click the triangle beside "Edit" and select "Copy".




   The displayed record view is pre-populated with the original meeting's values. Update the necessary fields.
3. Refer to step 2 and beyond in Creating Via Meetings Module above for additional instructions about creating meeting records.

Note: The original meeting record's invitees will also be included in the duplicated meeting record. You can remove the invitees from the Scheduling panel by clicking

the Minus icon on the far right of the invitee names.

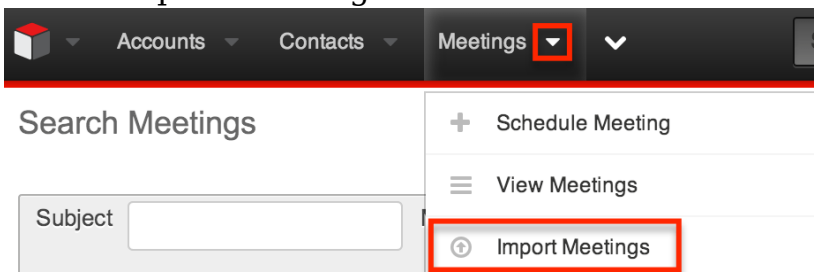



## Importing Meetings

The import function allows you to push multiple meeting records into Sugar using a comma (or other character) delimited file instead of creating them one-by-one. For more information on importing, please refer to the Import documentation.

Use the following steps to import meetings via the Import Meetings option:

1. Click the triangle to access the Actions menu in the Meetings module tab and select "Import Meetings".




2. In Step 1, select the import file and choose "Create new records only". Click "Next".
3. In Step 2, confirm the import file properties. Click "Next".
4. In Step 3, confirm the field mappings for the import. Click "Next".
5. In Step 5, view the import results.
    - The Created Records tab will show all of the new meeting records.
    - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
    - The Errors tab will show records that were not imported due to errors detected during import.

## Viewing Meetings

There are various options available for viewing meeting records in Sugar including via Meetings list view, Meetings record view, Meetings Recently Viewed menu, Calendar module, dashlets, and reports. Please note that you will only be able to see meeting records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

## Viewing Via List View

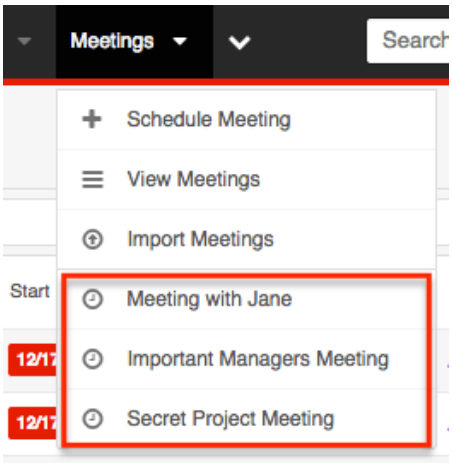
The Meetings list view displays all meeting records meeting the current search criteria. Users can also access the activity stream to view posts specific to the meeting record. For more information on the Record View's Activity Stream, please refer to the Activity Stream section of this documentation. The Intelligence pane can also be viewed to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's sales, cases, activities, etc. For more information regarding the Record View's Intelligence Pane, please refer to the Intelligence Pane section of this documentation. To access the list view, simply click the Meetings module tab. While list view shows key meeting fields, you can click the meeting's name to open the record in record view. For more information on viewing meetings via list view, please refer to the Meetings List View section of this documentation.

## Viewing Via Record View

The Meetings record view displays thorough meeting information including all meeting fields followed by subpanels of the meeting's related records belonging to various modules. Users can also access the activity stream to view posts specific to the meeting record. For more information on the Record View's Activity Stream, please refer to the Activity Stream section of this documentation. The Intelligence pane can also be viewed to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's sales, cases, activities, etc. For more information regarding the Record View's Intelligence Pane, please refer to the Intelligence Pane section of this documentation. The record view can be reached by clicking a meeting record's link from anywhere in the application including from the Meetings list view. For more information on viewing meetings via the record view, please refer to the Meetings Record View section of this documentation.

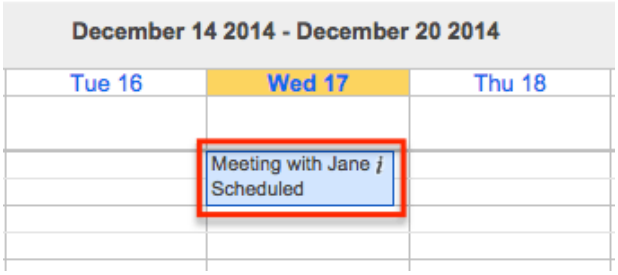
## Viewing Via Recently Viewed

As you work, Sugar will keep track of which meetings you have recently viewed. Click the Actions menu in the Meetings module tab to see a list of your most recently viewed meetings, and click each name to open the Meetings record view.




## Viewing Via Calendar

The Calendar module allows users to schedule, view, and manage various activities (Calls, Meetings, Tasks) in Sugar. Meeting records are displayed in blue on the calendar and you can click the corresponding cell to view the meeting details. You can also click the "i" icon to the far right of the meeting record cell for a quick view of additional details (e.g. Subject, Start Date & Time, etc.) of the meeting without opening up the record. For more information on viewing and managing meetings on the calendar, please refer to the Calendar documentation. Users also have the ability to view other users scheduled activities via the shared calendar option. For more information on viewing the shared calendar, please refer to the Calendar documentation.

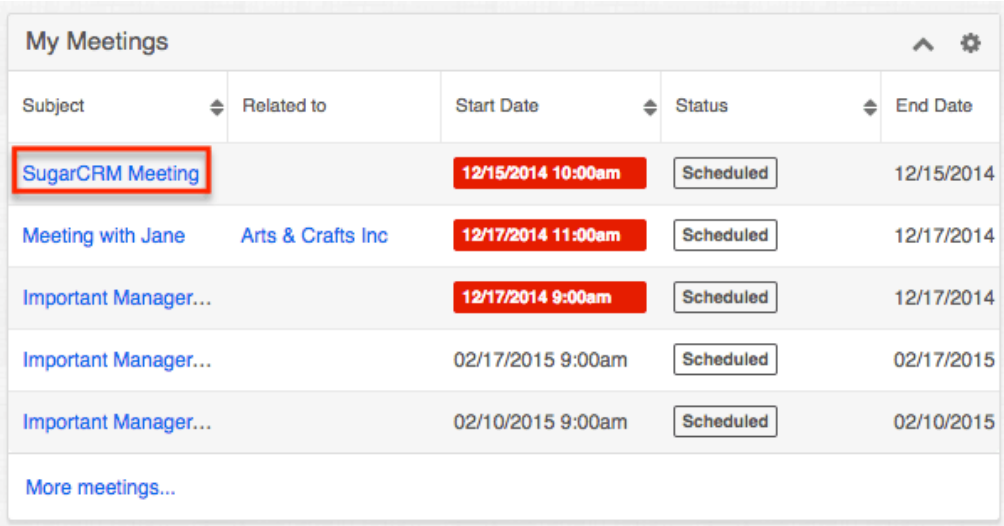



Please note that you will only be able to see meeting records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

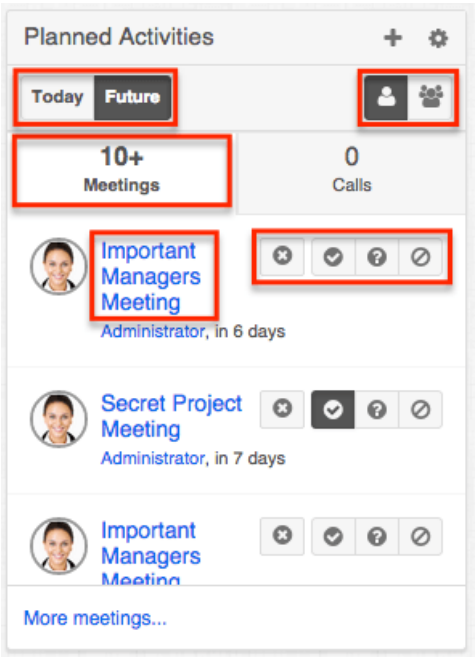
## Viewing Via Dashlets

Sugar Dashlets allow users to get a quick view of various records, activities, etc. Dashlets may be added to a user's Home page or to the intelligence pane of any Sidecar module (e.g. Accounts). You can view meeting information in List View dashlets specific to the Meetings module (e.g. My Meetings dashlet), as well as

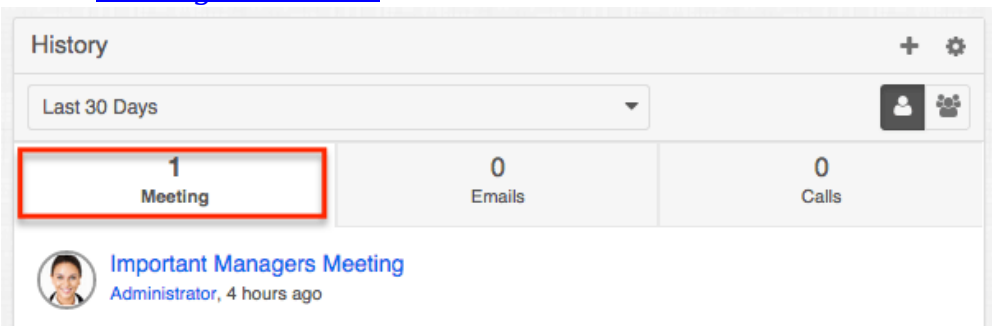
List View dashlets based on other modules such as "My Notes". Clicking a meeting's name from any dashlet will open the Meetings record view. For more information on using dashlets and viewing meeting records via dashlets, please refer to the Intelligence Pane documentation.




The Planned Activities dashlet on the record view's intelligence pane provides users with a list of open or upcoming calls and meetings that are related to the current record you are viewing. Click the Meetings tab to view a list of scheduled meetings and you can view more information regarding the meeting by clicking the meeting's name on the dashlet. You can filter the dashlet to view either the current day's scheduled meetings or upcoming meetings in the future by toggling between the Today or Future button. Please note that any open meetings where the start date is prior to the current data will display an Overdue status in red on the dashlet. For more information on using dashlets and viewing meeting records via the Planned Activities dashlet, please refer to the Intelligence Pane documentation. You can also accept, tentatively accept, decline, or close the meeting in the Planned Activities dashlet by clicking the buttons to the right of the meeting's row in the dashlet. For more information on closing meetings as held, please refer to the Closing Meetings section of this documentation.

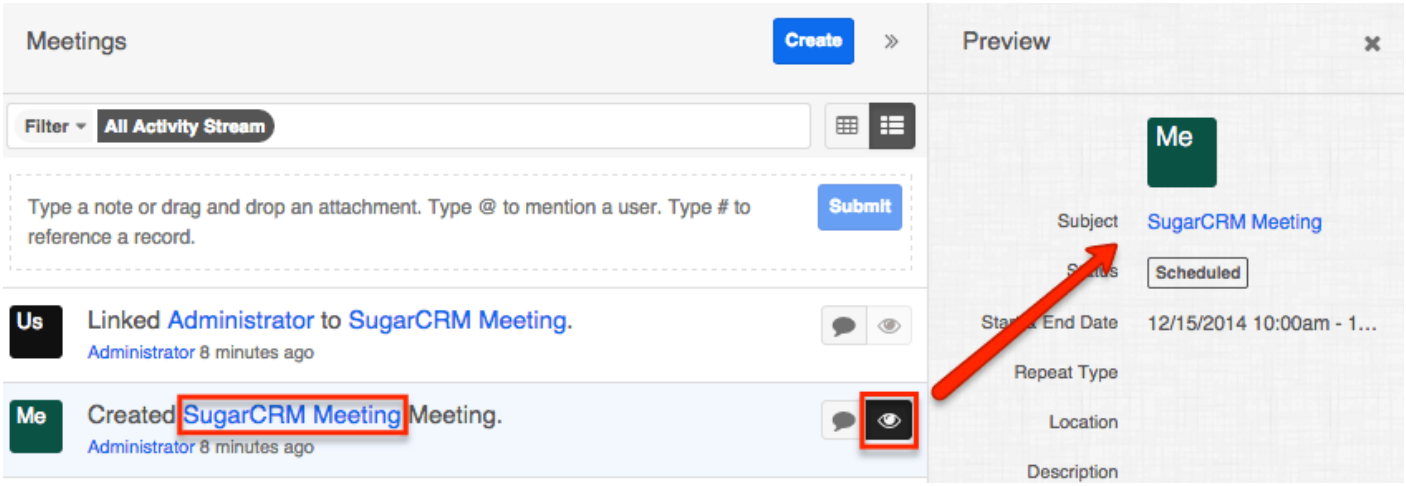



The History dashlet on the intelligence pane displays a history of the record's related activities (e.g. calls, meetings, emails) that have already taken place. To view all held meetings for the record, simply click the Meetings tab. You can also filter (Last 7 Days, Last 30 Days, Last Quarter) the History dashlet to only display a specific subset of the meetings matching the set time frame. For more information on using dashlets and viewing meeting records via the History dashlet, please refer to the Intelligence Pane documentation.



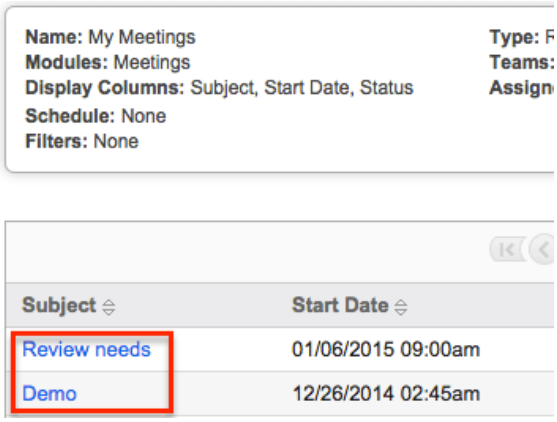

## Viewing Via Activity Streams

The activity stream allows users to view each other's activities in Sugar and the actions that took place for the various modules (e.g. Accounts, etc.) via posts (record post, user post, etc). You can access the Meeting record view by clicking the meeting's name referenced in the post. You can also preview the meeting record's detail directly from the activity stream by clicking the Preview button to the right of the post. For more information on viewing records via the activity stream, please refer to the Activity Streams documentation.




## Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding meetings and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the meeting record's record view by clicking the meeting's name in the report results. Please note that you can only directly access meeting record views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the documentation.




Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

# Searching Meetings

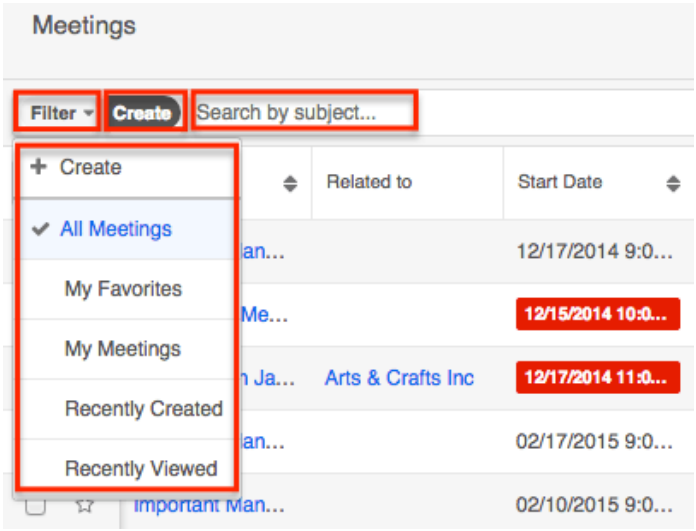
The Meetings list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Meetings list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %review). This will pull up any record that has the word "review" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

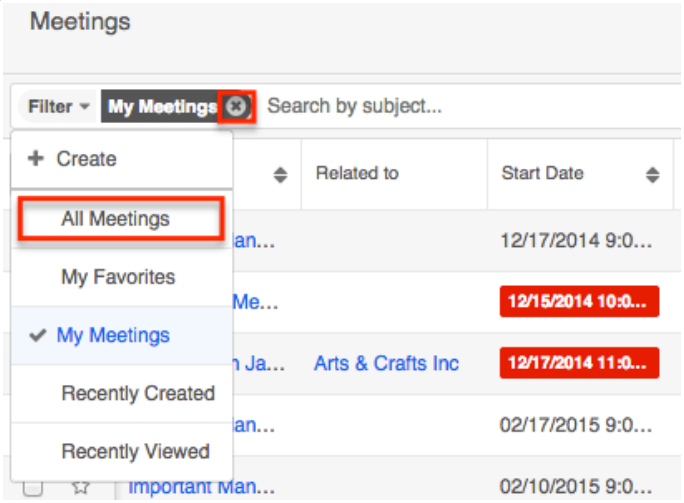
## Module Search

Module search enables users to easily search by meeting name within the Meetings module and pull up matching records in the list view. The search also provides a Filter option which can be used in combination with the open Search box to narrow your search further using the available options as follows:

- Create : Create a new custom filter which you can use to filter your search
  - Note: You can also click "Create" to the right of the Filter option.
- All Meetings : Returns all records in the module to which you have access
- My Meetings : Returns only records assigned to you
- My Favorites : Returns only records you have marked as favorites
- Recently Created : Returns only records you created in the module within the last 7 days
- Recently Viewed : Returns only records you have viewed in the module within the last 7 days




When you choose a filter, Sugar will return meetings which match both the selected filter and any name provided in the "Search by name..." bar in the filtered list view results. For example, if you select "My Meetings" in the Filter options and enter a meeting name, Sugar will only return meeting records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search bar. To see all meeting records to which you have access, simply select the All Meetings option in the filter and remove any text from the search bar. You can also click the Clear icon within the selected filter option (e.g. My Meetings) in the Search bar to clear the filter and pull up all list view search results. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the module. In addition, searches using the open Search box only or in combination with advanced filters (e.g. My Favorites) are preserved as well when you navigate away from the module. Returning to the list view will automatically display the results of your last filter.




Please note that you will only be able to see meetings records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management

documentation in the Administration guide. Administrators can configure what fields appear on the Meetings Module Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

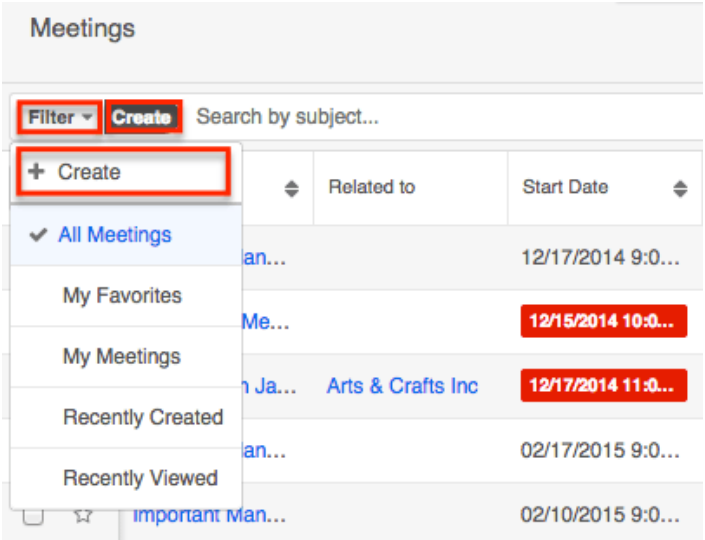
## Creating a Filter

Users can also create new filters via the Create option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the Meetings list view. You have the option to add multiple fields to your new filter by clicking the Plus button to the right of the filter selection dropdown lists and set select operators along with their value(s). A filter's criteria needs to be true for a record in order for it to appear in the list view search result. Additionally, filters with no specified values may be saved as a custom filter to act as a filter template when a user often searches using the same fields but with varying values. Please note that only fields you have view access for will appear in the Filter list when creating a search filter.

When you run a search using a created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter.

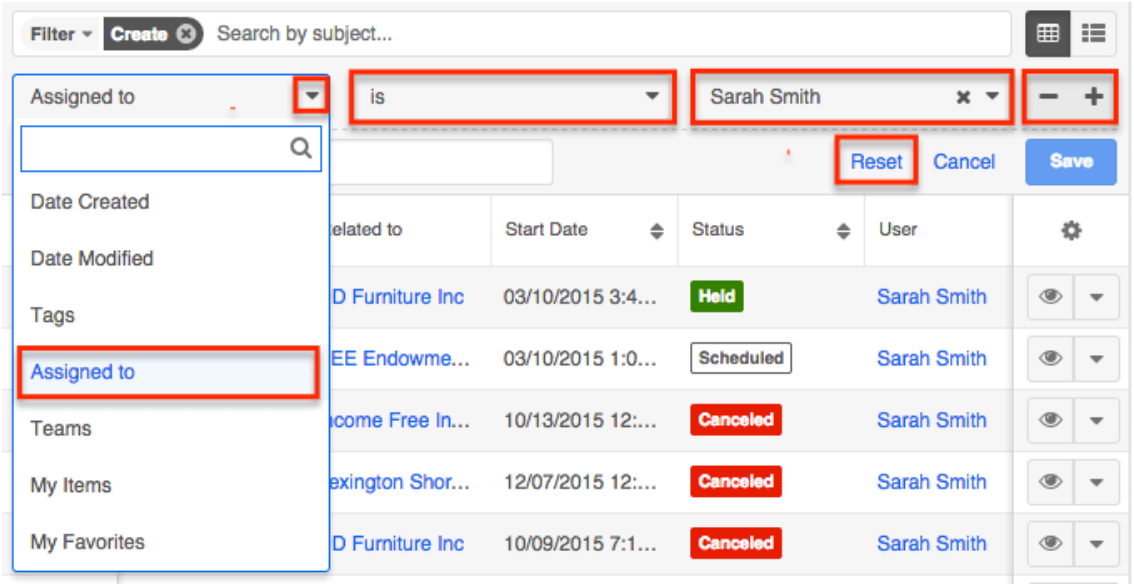
The following steps cover creating a new Assigned to filter as an example:

1. Click the Filter option on the Meetings search bar then select "Create".
    - You can also click "Create" to the right of the Filter option.




2. Select the field you wish to add to your filter as well as the condition and matching criteria.
    - Note: Only fields you have view access for will be available to add in the Filter list.

3. To add additional fields to the new filter, click the Plus button to the right of the filter.
    - To remove fields from the new filter, click the Minus button to the right of the filter.
    - To clear any filter values (e.g. Sarah Smith), simply click the "x" to the right of the value or select "Reset" to the left of the Save button.



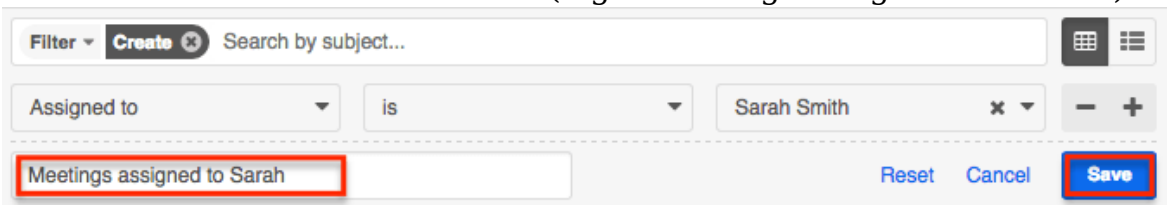

The list view will automatically display results matching your filters as you create and modify the criteria.

### Saving a Filter

Saving a filter will preserve the chosen fields as well as the condition(s) of the matching value(s). Additionally, it will allow users to easily select previously created and saved filters from the Filter options.

The following steps cover saving a new search by Name filter as an example:

1. Create a new filter to perform a search on your desired fields.
2. Enter in a name for the new filter (e.g. "Meetings assigned to Sarah").




3. Click "Save" to add this filter to the module's Filter options.

## Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search is used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.




To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

## Meetings List View

The Meetings list view displays all meeting records meeting the current search criteria to which your user has access. You can view the basic details of each meeting within the field columns. Please note that you will only be able to see meeting records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

The available status colors in the Meetings list view are as follows:

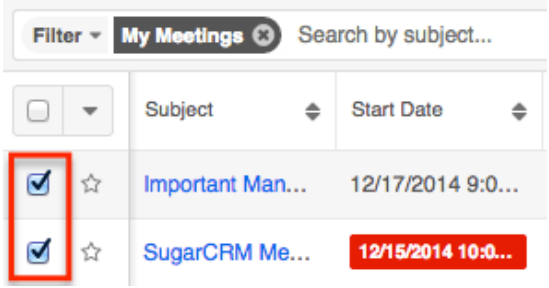
- Red : Meetings where the start date is in the past and is not marked as Held.
- Blue : Meetings where the start date is coming up within the next 24 hours and is not marked as Held.
- No color : Meetings with the start date is in the future (beyond 24 hours) or if

the status is marked as Held.

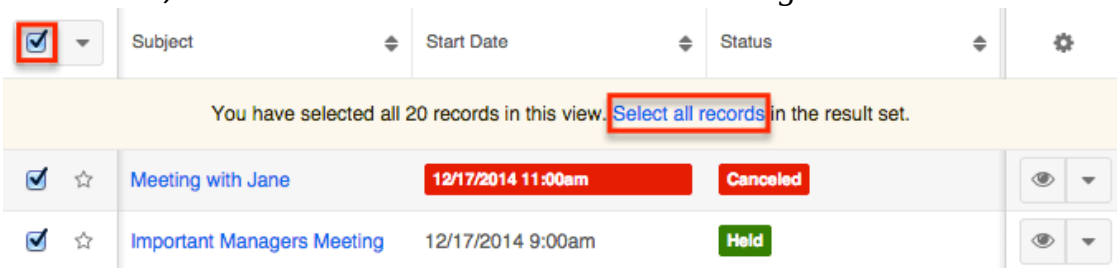
Users with administrator or developer access have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Checkbox Selection

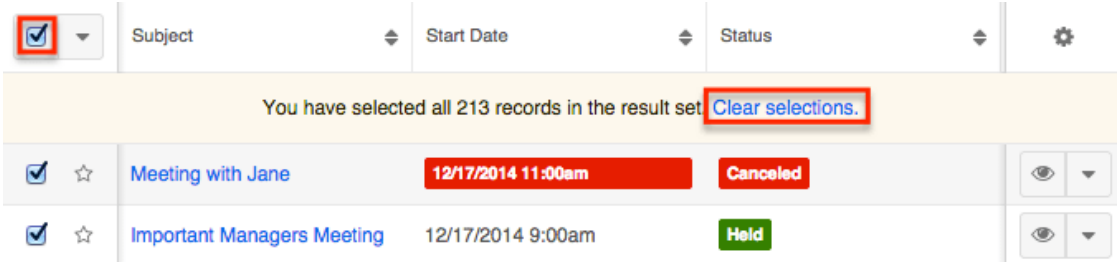
You can perform several actions on meeting records directly from the list view by first selecting the desired records. To select individual meeting records on the Meetings list view, mark the checkbox on the left of each row.




To select all meeting records displayed on the current set of list view results, click the checkbox to the left of the Actions triangle. A dialog will appear below the list view column headers indicating that you have selected all records on the list view's current results set (e.g. 20). To select all records matching the current search results set, click "Select all records" in the dialog.

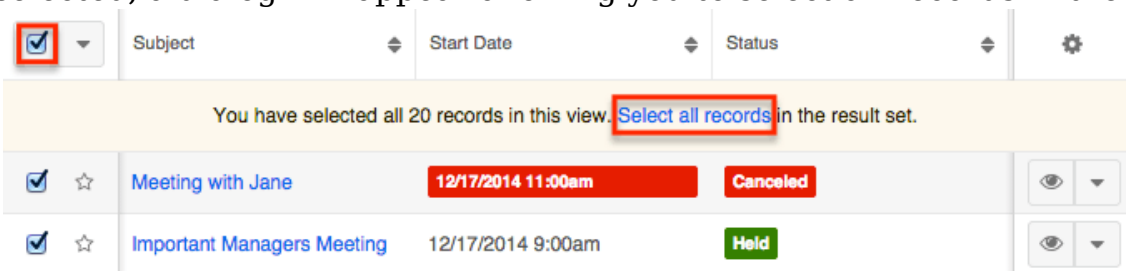



If you wish to clear the selection for all records on the list view result set, simply click "Clear selections" in the dialog. You can also clear the selections for all records by clicking the checkbox option again to remove the check marks.

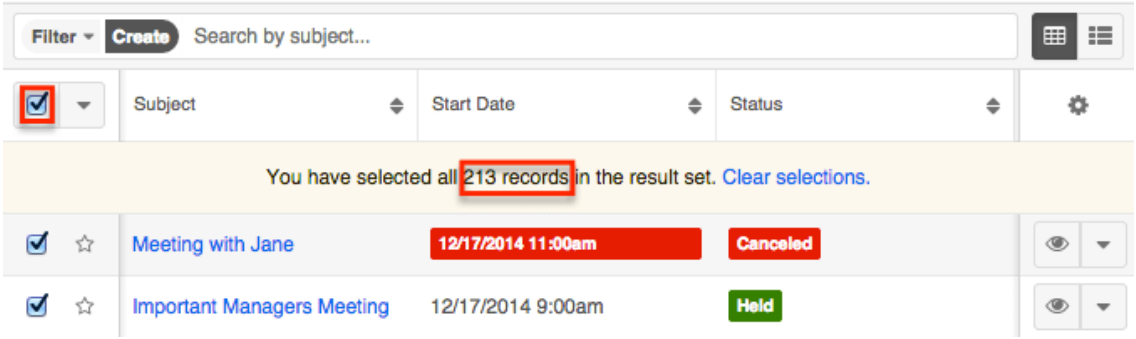



## Total Record Count

You can view the total record count on the Meetings list view by selecting all records displayed on the current set of list view results. Once the records are selected, a dialog will appear allowing you to select all records in the results set.

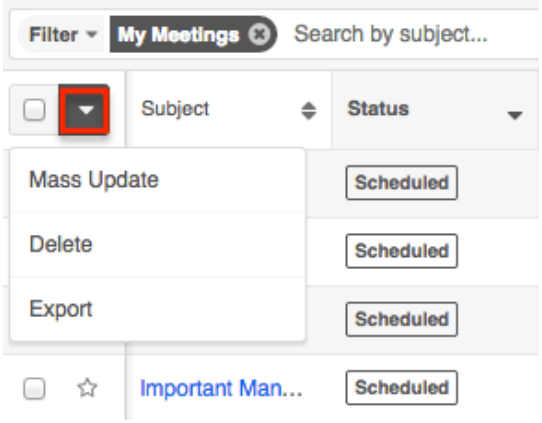



The total count of all records on the list view result set will appear in the dialog.




## Mass Actions Menu

The Mass Actions menu to the right of the checkbox option allows you to perform various actions on the currently selected records.



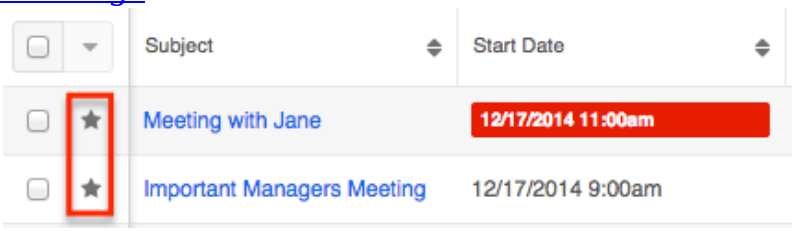

The options in the Mass Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Mass Update | Mass update one or more meetings at a time |

| | |
|---|---|
| Delete | Delete one or more meetings at a time |
| Export | Export one or more meetings to a CSV file |

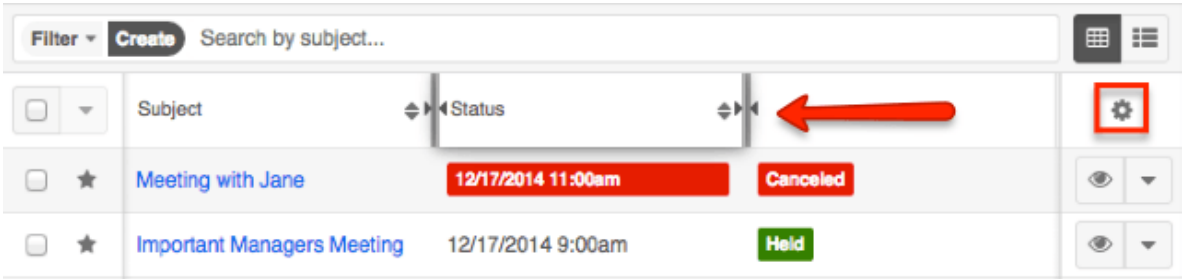
## Favorite Designation

Users have the option to mark meeting records as favorites via the list view as well as the record view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the Meetings module tab. In the Meetings list view, the star on the left of each meeting's row is grey once marked to indicate a favorite meeting. For more information on how to mark records as favorites, please refer to the Favoriting Meetings section of this documentation.




## Column Reordering

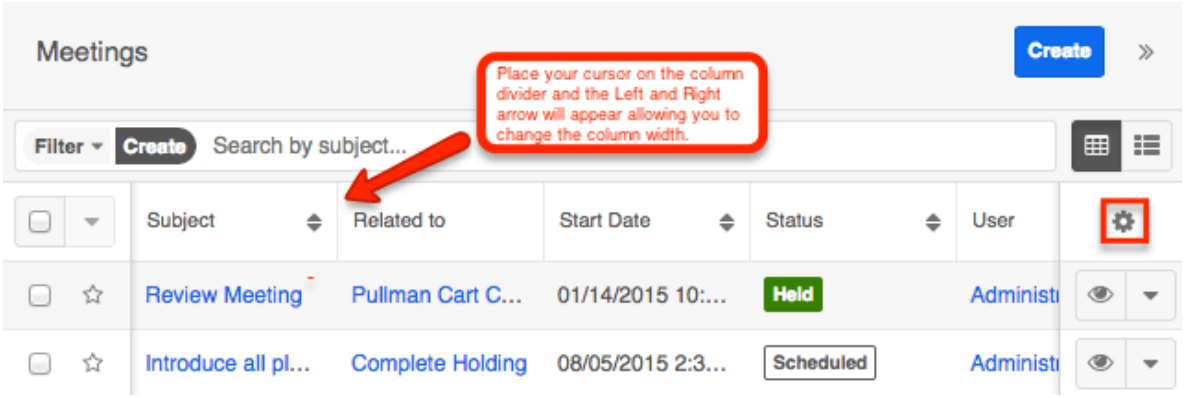
List view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the default column order.




## Column Resizing

Users can easily adjust the size of columns in the Accounts list view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The

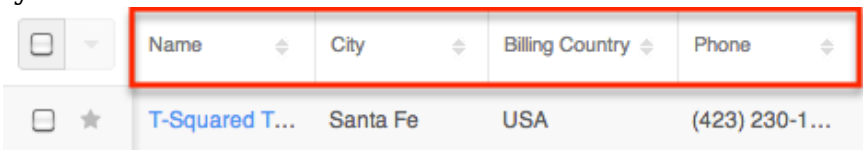
set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the current list view is different from the default column width. Changes to the column width made by administrators in Studio are only respected if the user has not resized the specific column in the list view. The column size set by the user will supersede the default column width configured in Studio until the user resets the list view back to the default widths.




## Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows.

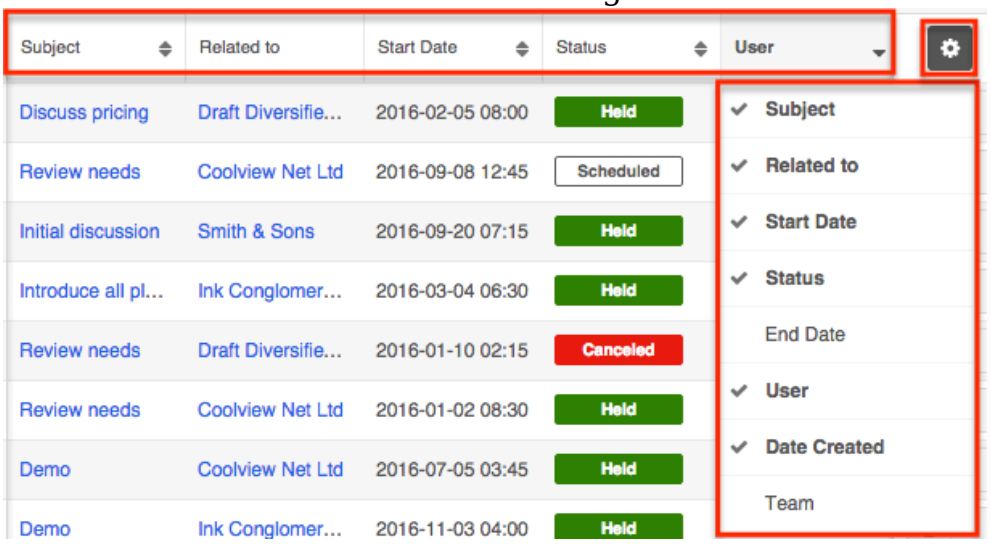
Note: List views may only be sorted by one column at a time and cannot be sorted by custom relate fields.




## Column Selection

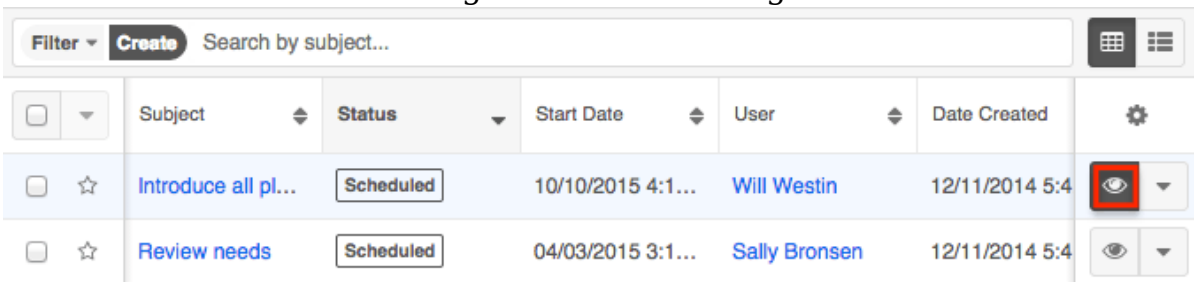
Sugar gives users the ability to personalize the list view by specifying which fields they want to be displayed in the list view. You can click the Column Selection icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column on your list view. Please note that administrators have the ability to configure what fields are available to display in the list view via Admin > Studio. For more information on

configuring fields to display in the list view, please refer to the Studio documentation in the Administration guide.

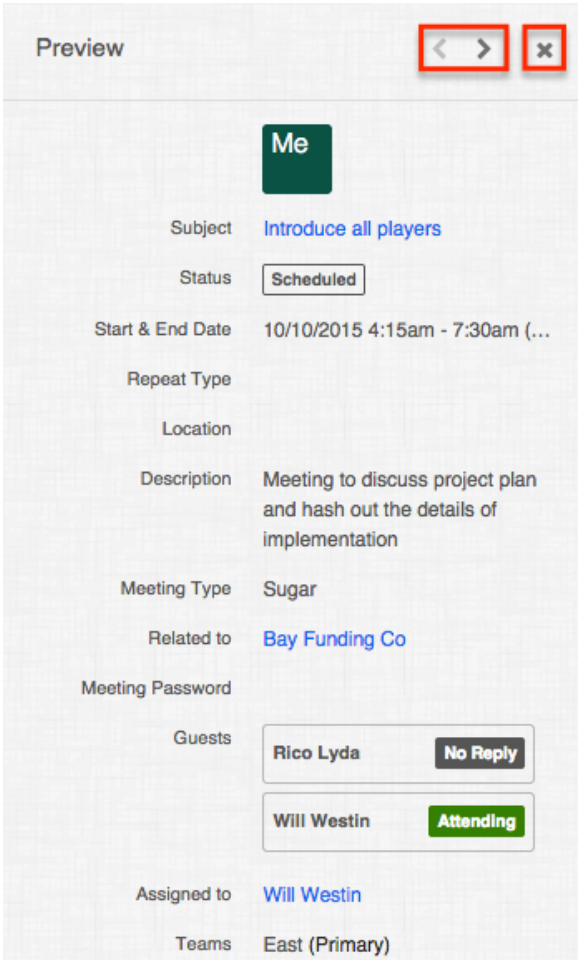



## Preview

Users can view a record's details directly from the Meetings list view by clicking the Preview icon to the far right of each meeting's row.

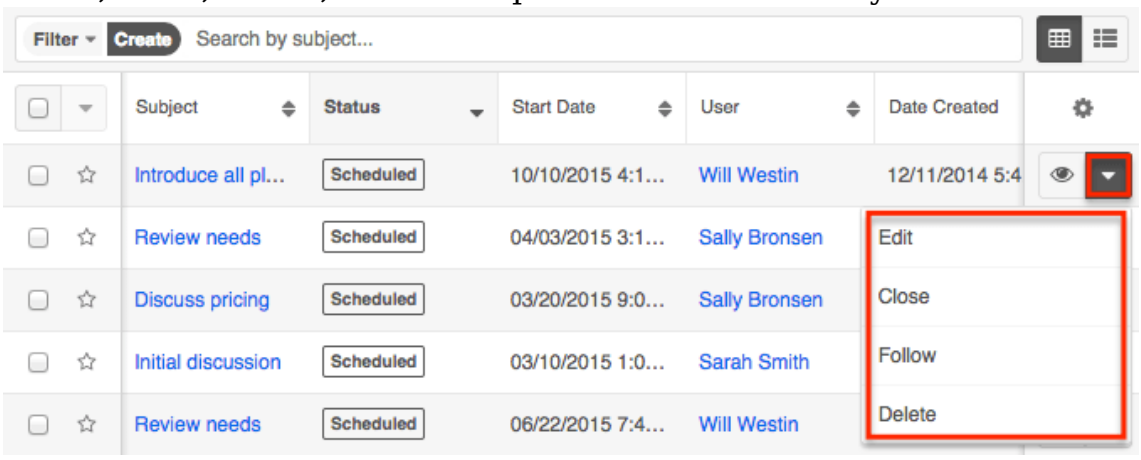



The record's data will display to the right of the list view providing key information regarding the record as well as the related activity stream information. On the upper right of the intelligence pane, there is a Left and Right arrow button that allows you to scroll through the list view's current search results by previewing the next or previous record. To close the preview, simply click the "X" on the upper right of the intelligence pane.




## Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to edit, close, follow, or delete specific records directly from the list view.

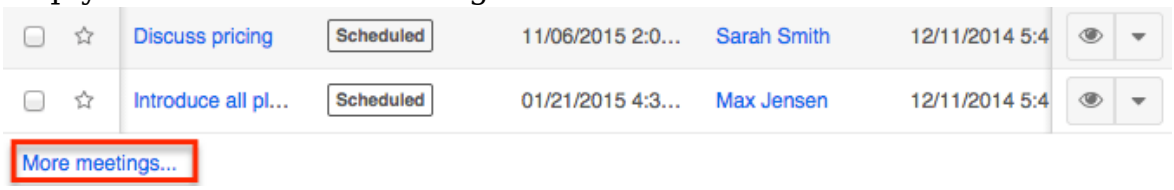



The options in the Record Actions menu allow you to perform the following operations:

| Menu Item | Description |
| --- | --- |
| Edit | Edit this meeting |
| Close | Close this meeting |
| Follow | Follow this meeting |
| Delete | Delete this meeting |

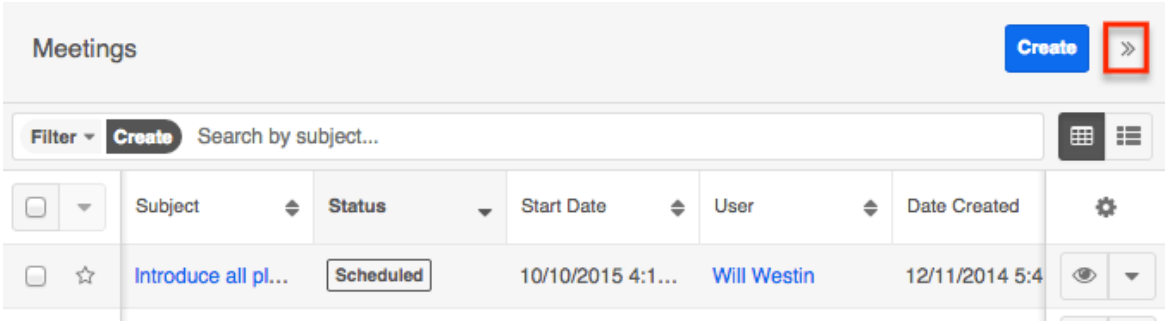
## More Meetings

The list view loads an initial number of records meeting the current search criteria with the option to show additional results at the user's request. By default, Sugar displays 20 records per list view results set, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.To load the next set of list view results, simply click the More Meetings link at the bottom of the list view.




## Right Hand Side Drawer

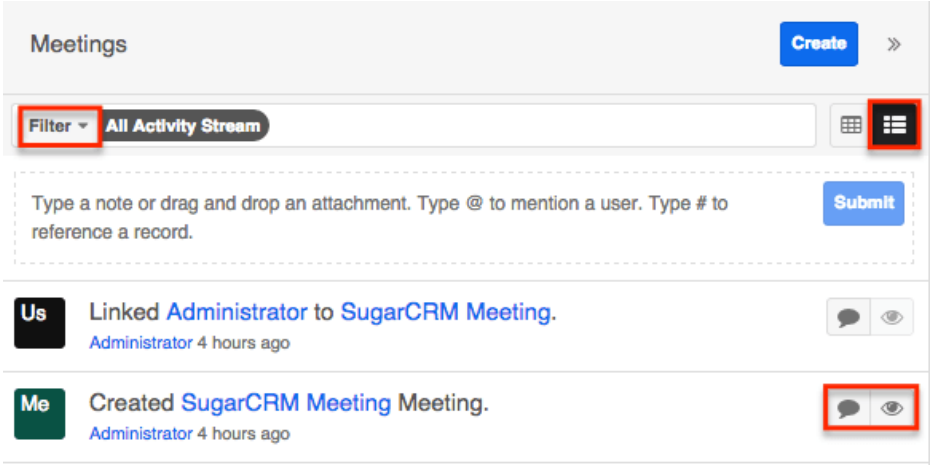
On the upper right of the Meetings list view there is a double arrow icon which allows users to expand the list view to the full screen width. The intelligence pane to the right of the list view will be hidden when the list view is expanded. To reduce the list view's width and reveal the intelligence pane, simply click the double arrow icon again.




## Activity Stream

The Meetings module's activity stream displays user posts made on the Meetings module and record posts relevant to an individual meeting record. To view the

module's activity stream, simply click the Activity Stream button to the right of the list view's search bar. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts using the comment button to the far right of each post. You can also preview the record referenced in record posts by clicking the Preview button to the right of each post. The activity stream can be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box and selecting the desired message type.

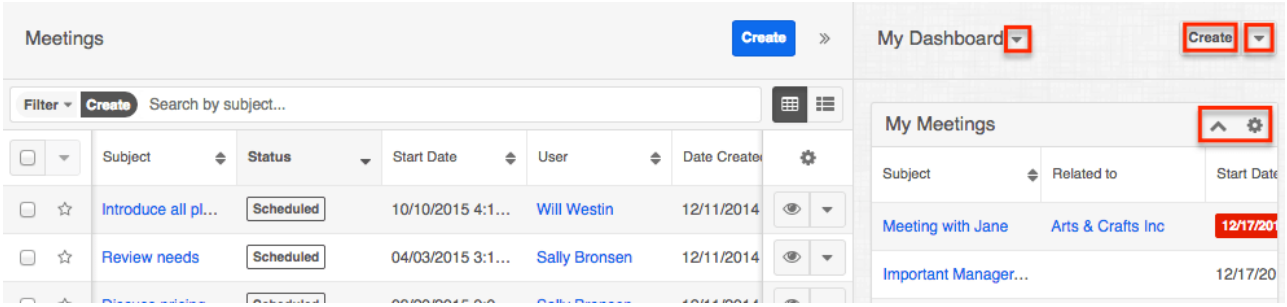



## Intelligence Pane

An intelligence pane displays to the right of the Meetings list view and provides users with valuable record information via various dashlets. The Help dashboard normally displays by default along with the List View Help dashlet and Learning Resources dashlet. The List View Help dashlet provides users with a brief introduction to the module along with a link (e.g. Meeting documentation) to the corresponding documentation in the Application guide. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may create other dashboards for use with the Meetings module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets (e.g. My Meetings, etc.) to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do no wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Meetings module. For more information on editing, creating, and rearranging dashboards and

dashlets, please refer to the Intelligence Pane documentation.



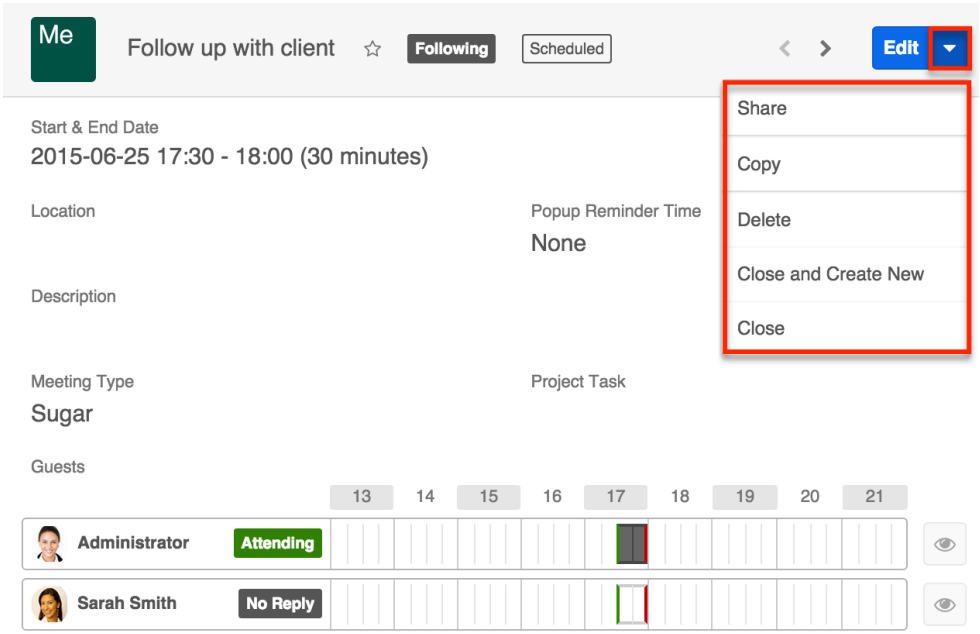

# Meetings Record View

The Meetings record view displays thorough meeting information including all relevant fields. Beneath the fields you can toggle between viewing an meeting's subpanels of related records (Contacts, Accounts, Opportunities, Leads, etc.) and the meeting's activity stream. The record view can be reached by clicking a meeting record's link from anywhere in the application including from the Meetings list view.

Please note that you will only be able to view a meeting record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Users with administrator or developer access have the ability to change the record view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Actions Menu

The Actions menu on the top right of each meeting's record view allows you to perform various actions on the current record.



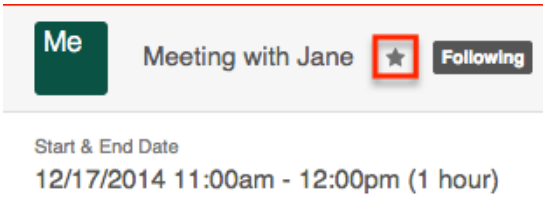

The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this meeting |
| Share | Share a link to this meeting via email |
| Copy | Duplicate this meeting |
| Delete | Delete this meeting |
| Close and Create New | Close this meeting as "Held" and create a new copy of the meeting<br><br>Note: The Close and Create New button appears as long as the status does not equal "Held". |
| Close | Close this meeting as "Held"<br><br>Note: The Close button appears as long as the status does not equal "Held". |

## Favorite Designation

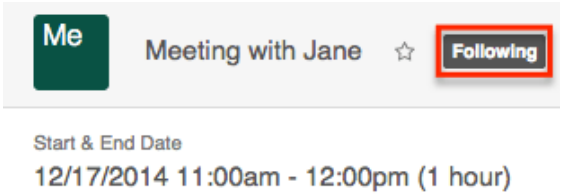
Users have the option to mark meeting records as favorites via the record view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the Meetings module tab. In the Meetings record view, the star on the right of the meeting's name is grey once favorited. For more information on how to mark

records as favorites, please refer to the Favoriting Meetings section of this documentation.



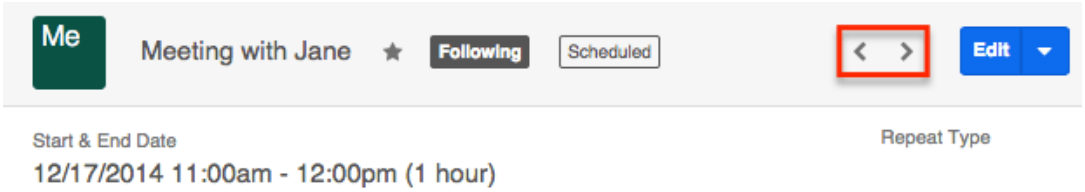

## Following Designation

Users also have the option to follow meeting records via the record view or list view. This allows users to view record posts from followed meetings on their Home page and Meetings list view activity streams. Each user can personalize their activity stream by viewing posts for records that are most important to them. From the record view, users may follow or unfollow meetings to which they have access using the Follow button to the right of the meeting's name. For more information on how to mark records to follow via the list view, please refer to the Record Actions Menu section of this documentation. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. If you wish to stop following a specific meeting record, click the Following button to revert it to gray. Should a user lose access to a record in Sugar, they will automatically stop following that record.




## Next or Previous Record

On the upper right of the Meetings record view, there are two buttons that allow you to page through each meeting in the Meetings list view's current search results. Clicking the left arrow button displays the previous meeting of the current search results while clicking the right arrow button displays the next meeting of the current search results.



## Show More

The Meetings record view typically display a few key fields on the business card panel with the option to view more fields by clicking the Show More link on the bottom left. Please note that administrators can configure what fields appear on the business card panel via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

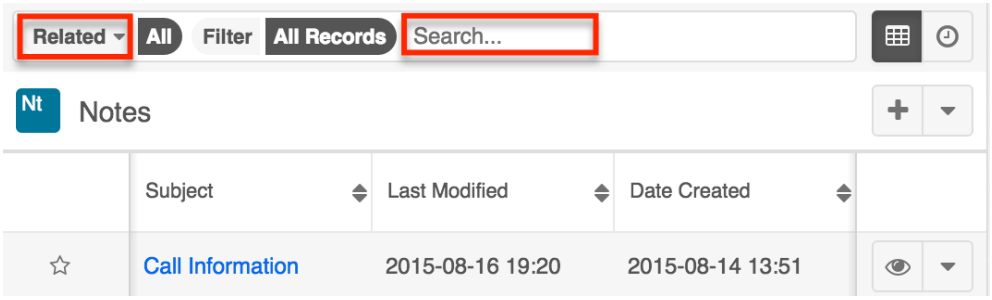



## Subpanels

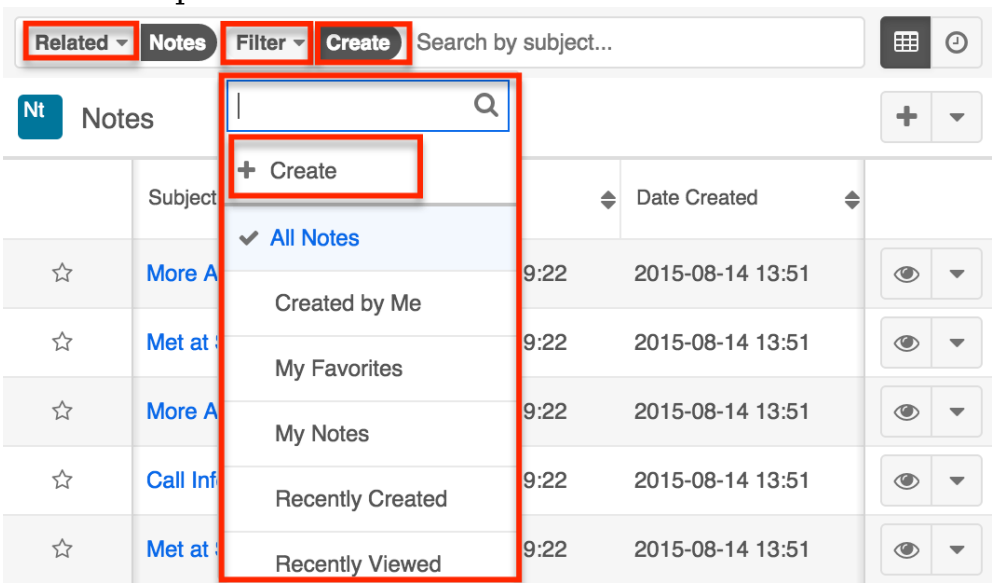
Beneath a meetings record's fields is the subpanel containing related records. By default, only the Notes subpanel displays in the Meetings module. Administrators can create new relationships between various modules in Sugar to create additional subpanels. For more information on creating relationships, please refer to the Studio documentation in the Administration guide. Select the Data View button to display the subpanel rather than the record's activity stream.

### Filter Options

While in Data View, all of the meeting record's related records will be displayed beneath the meeting record's fields. Users have the ability to search for records which appear in the subpanels as well as filter the view to only display a specific module (e.g. Notes). To locate a record by name, enter the keyword into the Search bar. If additional subpanels have been configured, click the Related option to the far left of the Search bar to select the module whose subpanel you wish to view. Filter and search may be combined to only display matching records within a selected module. To see all subpanels to which you have access, simply select "All" in the Related options and remove any text from the search bar. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the page. In addition, searches using the open Search box only or in combination with advanced filters (e.g. My Favorites) are preserved as well when you navigate away from the page.




When a Sidecar module (e.g. Notes) is selected from the Related options, you have the option to filter the related subpanels further using one of the available options (e.g. My Favorites, Recently Created, etc.). Please note that you can also create custom filters for related Sidecar modules. Once the related module is selected, either click the Filter option and select "Create" or click "Create" to the right of the Filter option.




Reordering Subpanels

Users can easily move subpanels to a new location on the record view by dragging and dropping the subpanel's header. The new subpanel order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared.

Note: By default, only the Notes subpanel displays in the Meetings module. Administrators can create new relationships between various modules in Sugar to create additional subpanels. For more information on creating relationships, please refer to the Studio documentation in the Administration guide.

Related Record Subpanels

Subpanels displayed on a meeting's record view contain the meeting's related records belonging to various modules. A module's relationship to the Meetings module determines whether a related record will be displayed in the field listing or in a subpanel. For example, a meeting may be related to multiple notes, which means that the related notes will be displayed in a subpanel beneath the fields.

Users with administrator or developer access have the ability to change the fields (e.g. Subject, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.

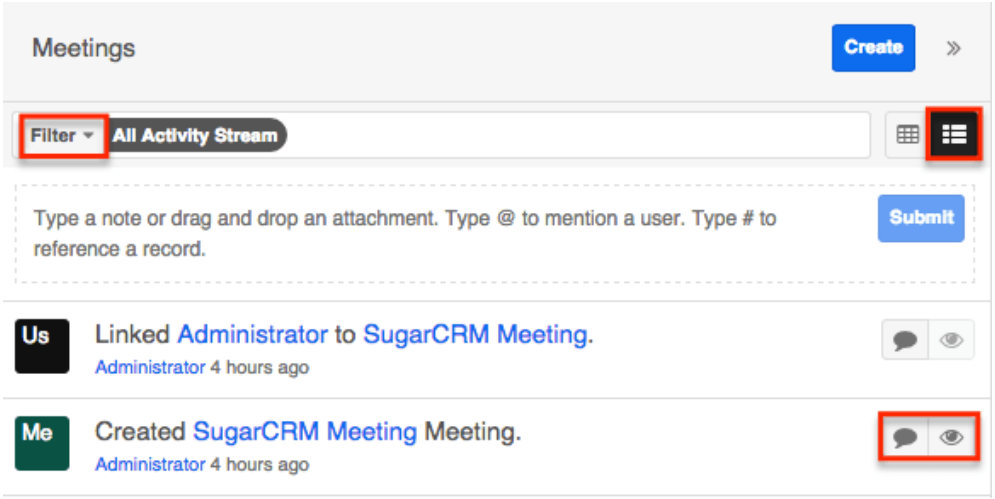
Related record subpanels allow the following operations to be performed:

- To view the details of a related record, click the record's name in the subpanel to open it in record view.
- To relate an existing record to the meeting, choose "Link Existing Record" from the subpanel's Action menu, then locate and select the desired record. Please note that the Link Existing Record option is not available when the relationship is required in the related module.
- To relate a new record to the meeting, click the Plus button to the left of the Actions menu, then complete the record view layout and click "Save".
- To preview the related record, click the Preview icon to the far right of the record's row in the subpanel.
- To inline edit the record directly from the subpanel, choose "Edit" from the Actions menu on the far right of the record's row and click "Save" to preserve the change.
- To delete the meeting's relationship to a record, choose "Unlink" from the Actions menu on the far right of the record's row. This removes the relationship, but does not delete the record itself. Please note that the Unlink option is not available when the relationship is required in the related module.
- To mark the record as a favorite, click the star icon to the left of the desired record's row.
- To collapse or expand the subpanel, click anywhere on the subpanel's header.
- To change the column size in the subpanel, place your cursor on the column divider and, when the Left and Right arrow appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.

## Activity Stream

The Meeting record view's activity stream displays user posts and record posts

specific to the individual meeting record. To view the record's activity stream, simply click the Activity Stream button below the meeting's fields. User's can view all posts in the record view's activity stream even if they do not follow the record in Sugar. Please note that you must follow the record if you wish to view the record view posts via the Home page or List View activity stream. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts by clicking the Comment button to the far right of each post, entering in your comment, then clicking "Reply". You can also preview the record referenced in the record post by clicking the Preview button.The activity stream can also be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box then selecting the desired message type.

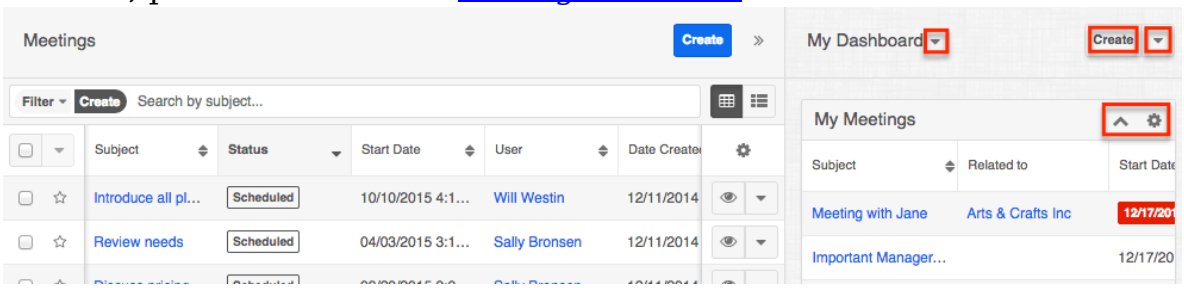



## Intelligence Pane

An intelligence pane displays to the right of the meeting's record view and provides users with valuable information specific to the meeting's sales, activities, etc. The Help Dashboard normally displays by default along with the Record View Help dashlet and Learning Resources dashlet. The Record View Help dashlet provides users with a brief introduction to the module along with some instructions to help users utilize and navigate around the record view. A link to the corresponding documentation (e.g. Meetings documentation) in the Application guide is also provided within the Help dashlet. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard, which will display some stock dashlets (e.g. Planned Activities dashlet, History dashlet , etc.) by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". For example, the History dashlet displays calls and meetings that have taken place as well as related emails for the account record. By default, the Opportunity Metrics,

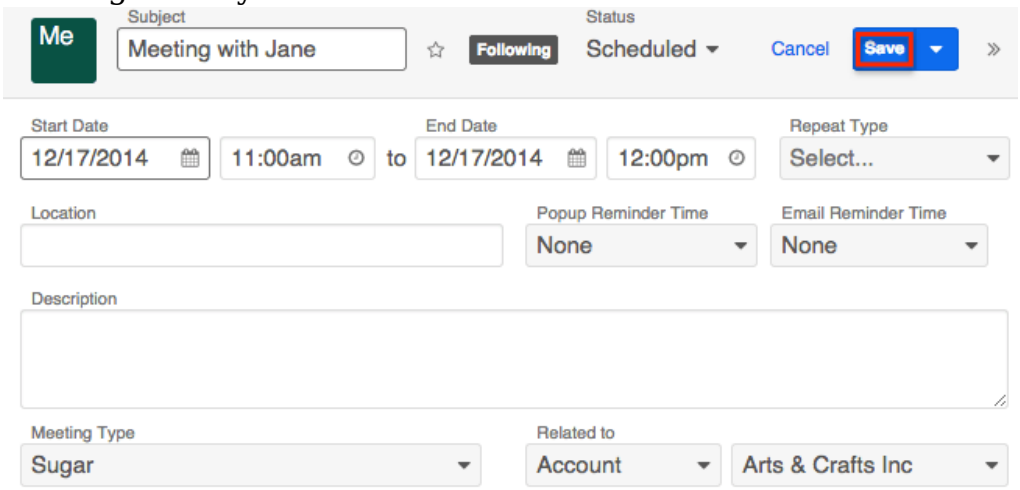
Case Summary, News Feed, Planned Activities, and History dashlets are available in the stock dashboard called "My Dashboard". Users may choose to view any of their dashboards using the triangle to the right of the current dashboard's name and may create other dashboards for use with the Meetings module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do not wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Meetings module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.




## Editing Meetings

Meetings may be edited at any time to update or add information to the record. You can make changes to existing meeting records via the Meetings record view. The record view is available within the Meetings module and includes all of the Meeting fields you should need.



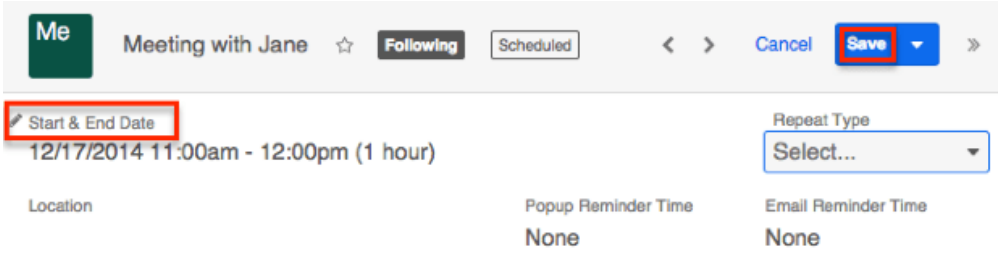

Please note that your ability to edit meetings in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator

if you do not see the Edit options.

Administrators in Sugar may configure the Meetings record view via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

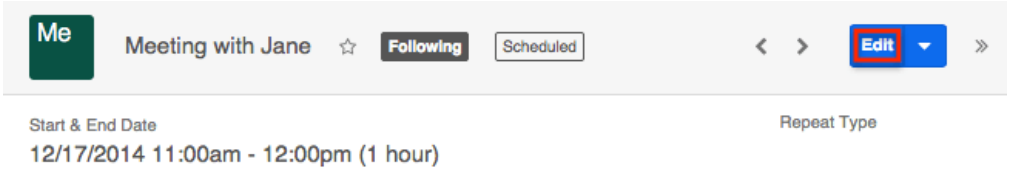
## Editing Inline Via Record View

Users can edit individual fields on the Meetings record view without entering the full edit mode by clicking the field name. Fields which are available for inline editing will display a pencil icon when hovering on the field name or value. This will allow users to type or select a new value. Click "Save" to preserve the changes made to the field.



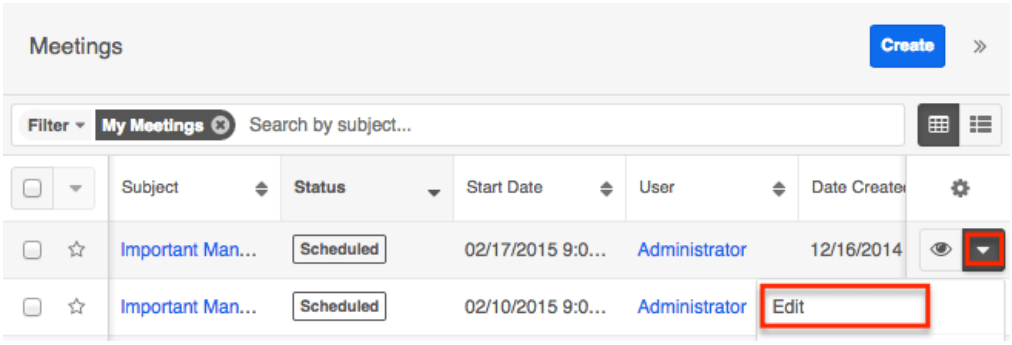

## Editing Via Record View

You can edit many meeting fields at once via the record view by clicking the Edit button on the upper right of the page. Once the record view layout is open, update the necessary fields, then click "Save" to preserve the changes made.




## Editing Inline Via List View

You can also edit individual fields on the Meetings list view without entering the full edit mode. Click the Record Actions menu to the far right of the record's row and select "Edit".




The fields on the record's row will open up allowing user's to type or select a new value. You can click the double arrow icon on the upper right of the page to expand the list view for editing. Click "Save" to preserve the changes made to the meeting record.




Note: Text area fields are not inline editable from list views.

## Deleting Meetings

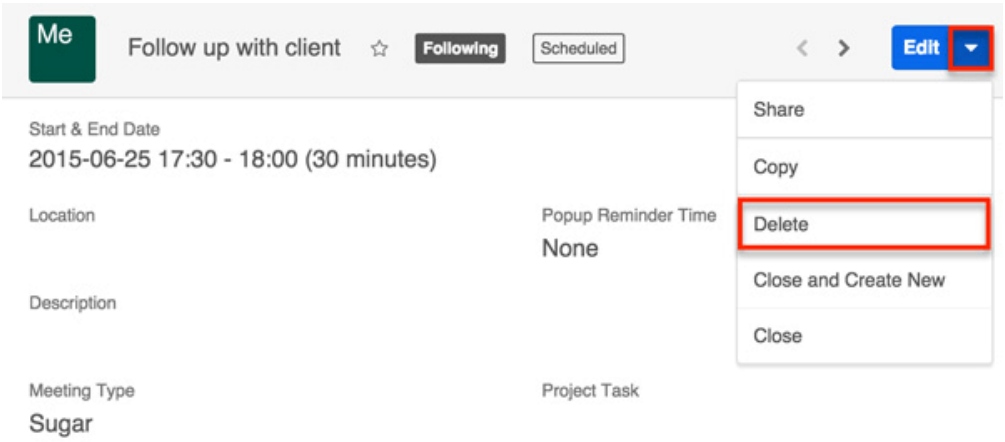
If a meeting record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Meetings record view or list view. Deleting via the record view allows you to delete a single record while the list view allows for mass deleting multiple records at once as well as single record deletions. Deleting meeting records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

Please note that your ability to delete meetings in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

### Deleting Via Record View

Use the following steps to delete a meeting record via the record view:

1. Navigate to an meeting's record view.
2. Select "Delete" from the Actions menu.

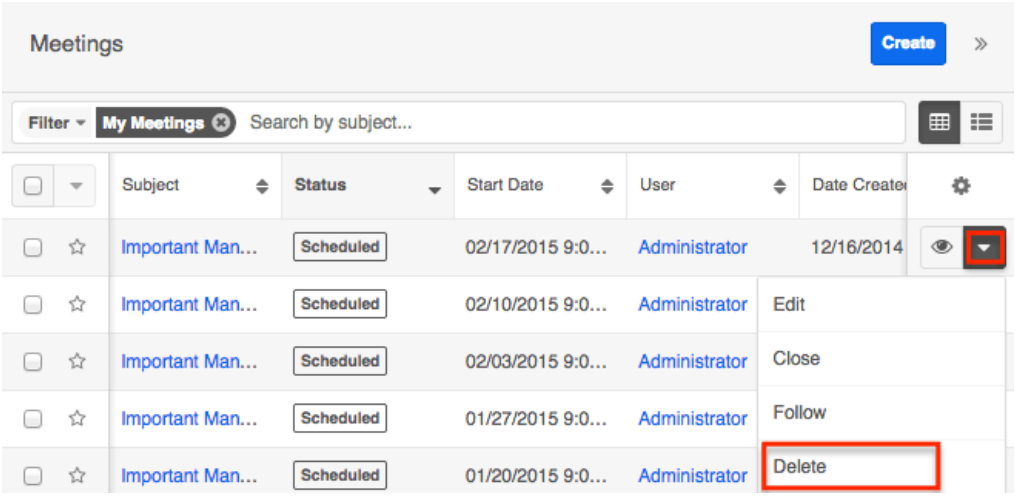



3. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

## Deleting Via List View

Use the following steps to delete a meeting record via the list view:

1. Navigate to the Meetings list view by clicking the Meetings module tab.
2. Use the Module Search to find the Meeting record you wish to delete.
3. Click the Record Actions Menu to the far right of the record's row and select "Delete".

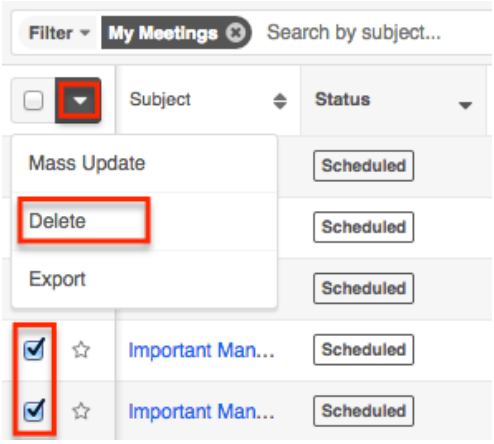



4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

## Mass Deleting Via List View

Use the following steps to delete one or more meeting records via the list view:

1. Navigate to the Meetings list view by clicking the Meetings module tab.
2. Use the Module Search to find the Meeting records you wish to delete.
3. Select the desired meeting records then choose "Delete" from the Actions menu.




4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

You can also use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to delete more than 1000 records or delete a specific group of records on the list view, please use the in module search to perform the deletions in smaller batches.

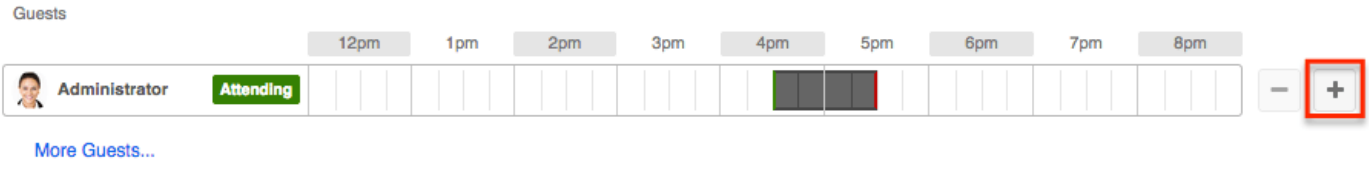
## Adding Invitees to Meetings

Users have the option of adding additional invitees (e.g. Contacts, Leads, Users) to meetings via the Add Invitees or Create an Invitee option in the Meetings record view. Please note that the user creating the meeting as well as the contact or lead selected in the Related to field will automatically be added as invitees to the meeting. You can simply remove yourself or an attendee from the meeting by clicking the Remove icon ("-") in the Scheduling panel.

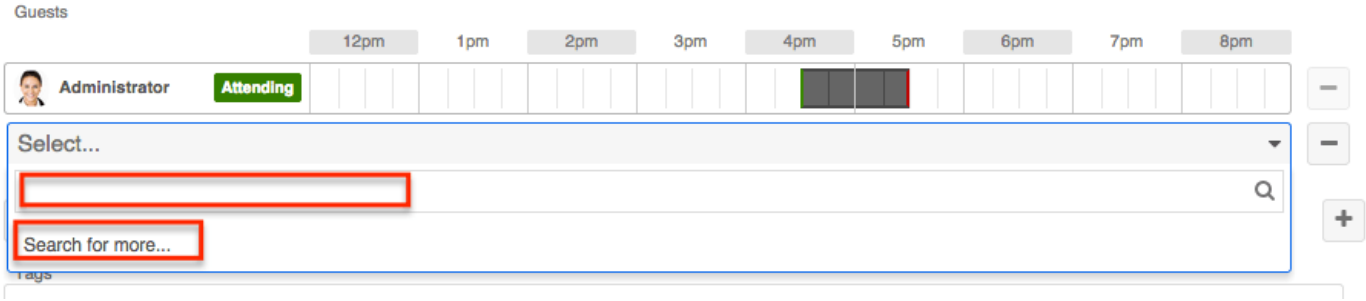
### Adding Via Add Invitees

Use the following steps to add attendees via the Add Invitees panel:

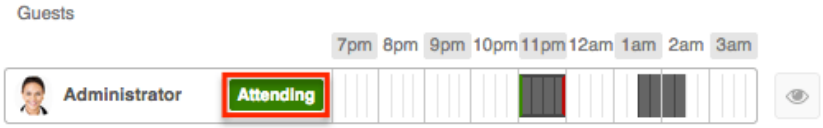
1. Navigate to a meeting record view.
2. Scroll to the Guests panel and select "+" located on the far right.



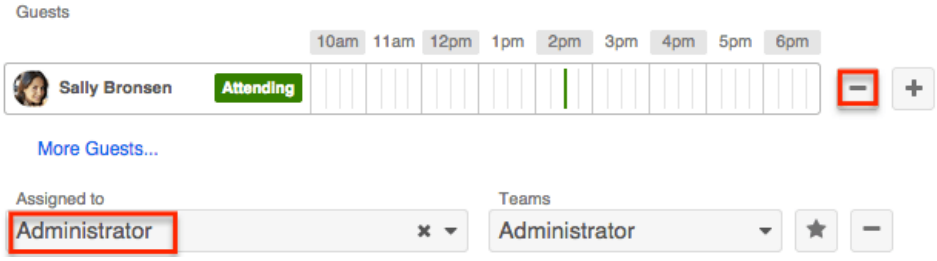
3. Type in the users or guests name via the search bar that appears or select "Search for more..." for the Contacts list view.




4. Click "Save and Send Invites".
5. Once the invitee has responded to the email invitation, the status will appear to the right of their name.



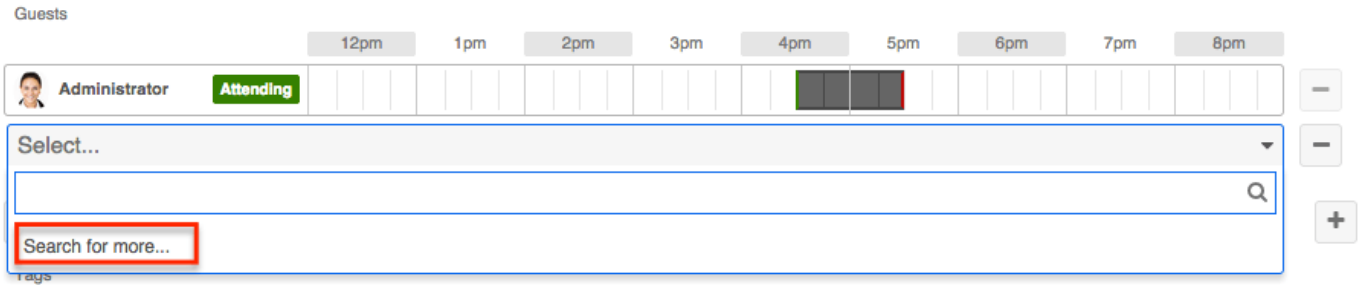

Note: The assigned user will automatically be added as a guest to the meeting. If the same record is reassigned, the original user will still show as a guest but can now be removed.




## Adding Via Create an Invitee

Use the following steps to add attendees via the Create an Invitee option:

1. Navigate to a meeting record view.
2. Scroll to the Guest panel, select "+", and then select "Search for more...".




3. Select "Create" and fill out the appropriate fields. Once completed, save the

new record and Sugar will automatically attach them as a guest for the meetings.

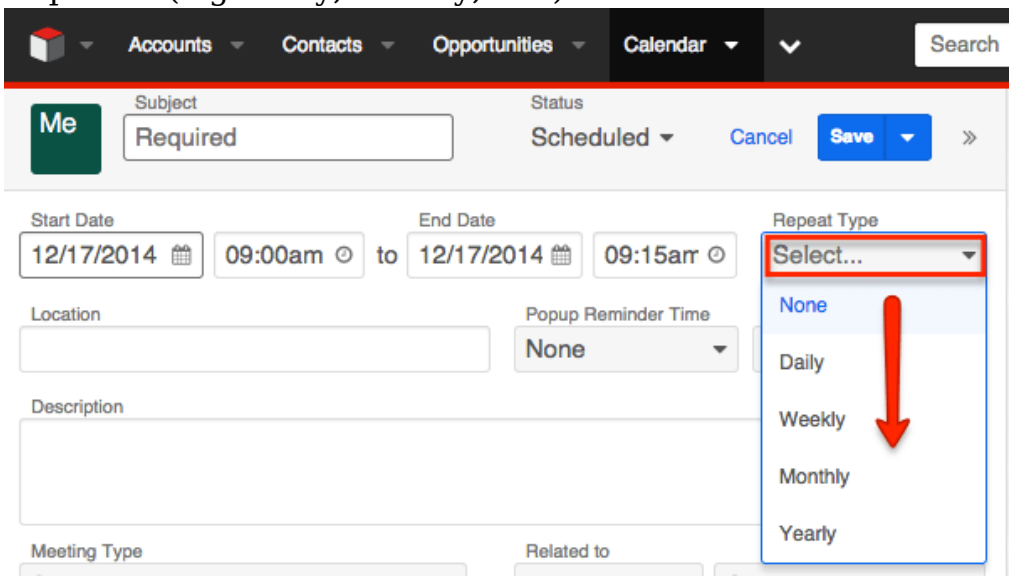
The contact or lead will appear as an invitee in the Scheduling panel in the Meeting's record view.

## Setting Up Recurrences

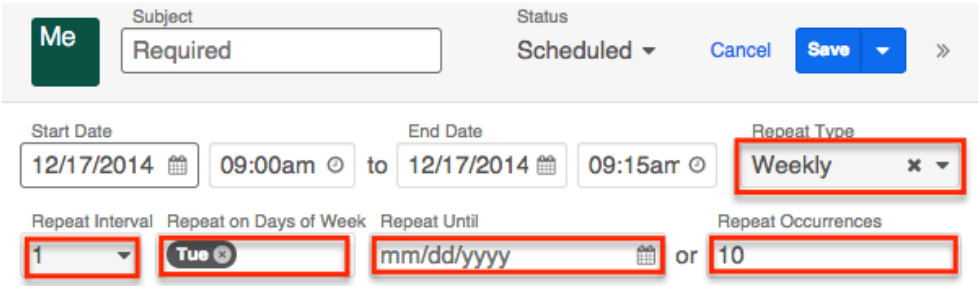
Meetings can be set as recurring events so that users do not have to create individual meeting records for regularly occurring events. Recurrences can be set up to occur daily, weekly, monthly, or yearly. When a recurring meeting is configured, individual meeting records are created in Sugar, so when viewing the , all recurrences will show.

To schedule the meeting as recurring, follow the instructions below:

1. Navigate to the Meetings module and create a new record or edit an existing record.
2. Click the Repeat Type field and select the appropriate interval from the dropdown (e.g. Daily, Weekly, etc.).




3. When you select an interval, you must specify how often the scheduled meeting will recur as well as when the date for when the last meeting takes place.

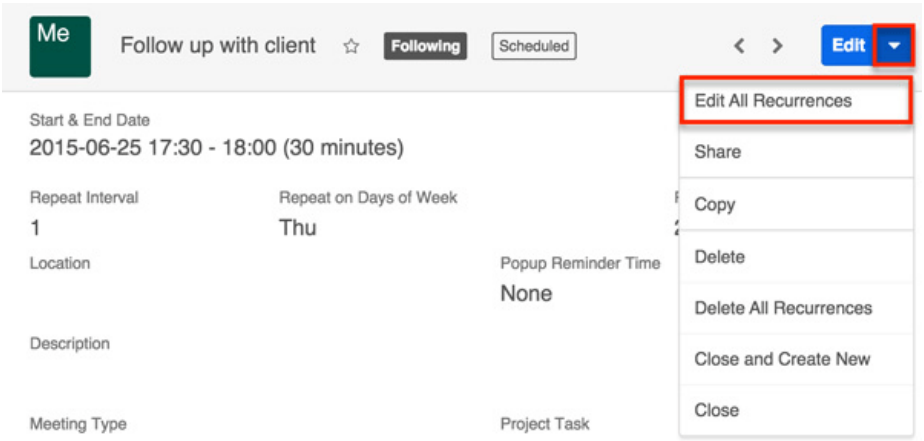



4. Once the record is saved, all recurrences will appear in the Meeting list view.

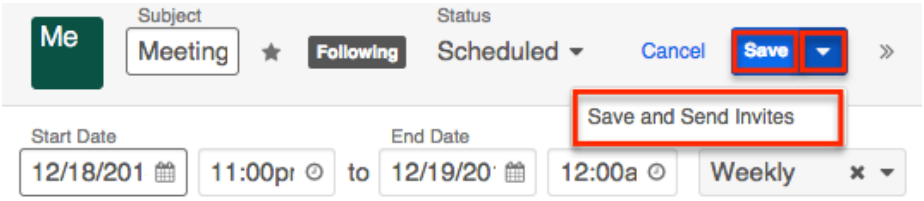
Editing All Recurrences via Record View

Use the following steps to edit all recurrences for a meeting via the record view:

1. Navigate to a meeting's record view.
2. Select "Edit All Recurrences" from the Actions menu.



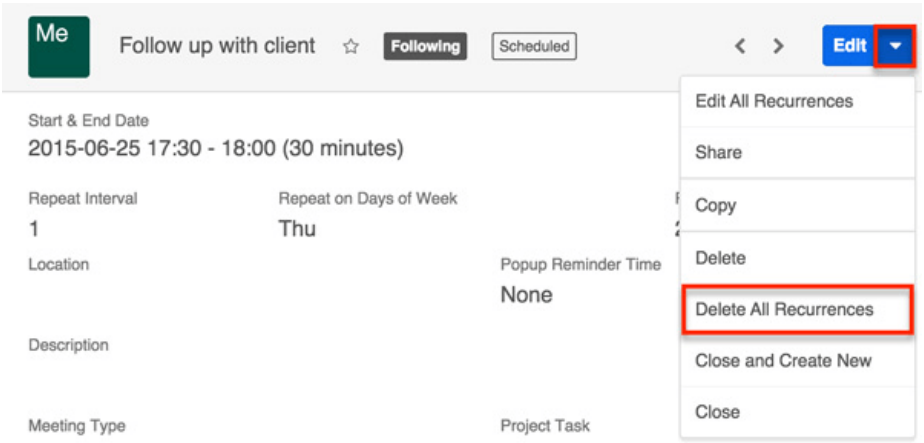

3. Edit the record. Then select "Save" or "Save and Send Invites".




Deleting All Recurrences via Record View

Use the following steps to delete all recurrences for a meeting via the record view:

1. Navigate to a meeting's record view.
2. Select "Delete All Recurrences" from the Actions menu.

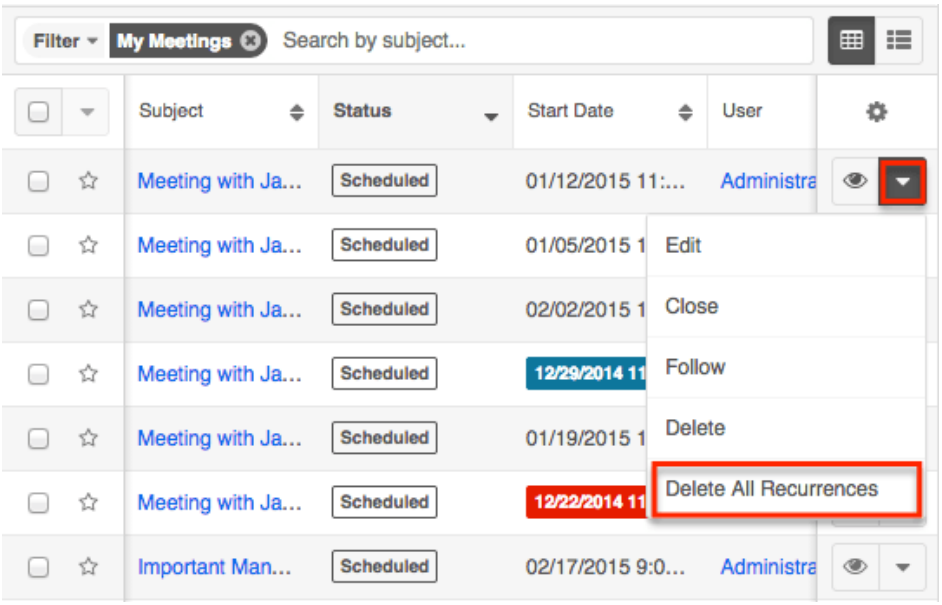



3. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

Deleting All Recurrences via List View

Use the following steps to delete all recurrences for a meeting via the record view:

1. Navigate to the Meetings list view by clicking the Meetings module tab.
2. Use the Module Search to find the Meeting record you wish to delete.
3. Click the Record Actions Menu to the far right of the record's row and select "Delete All Recurrences".




4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

Adding Reminders

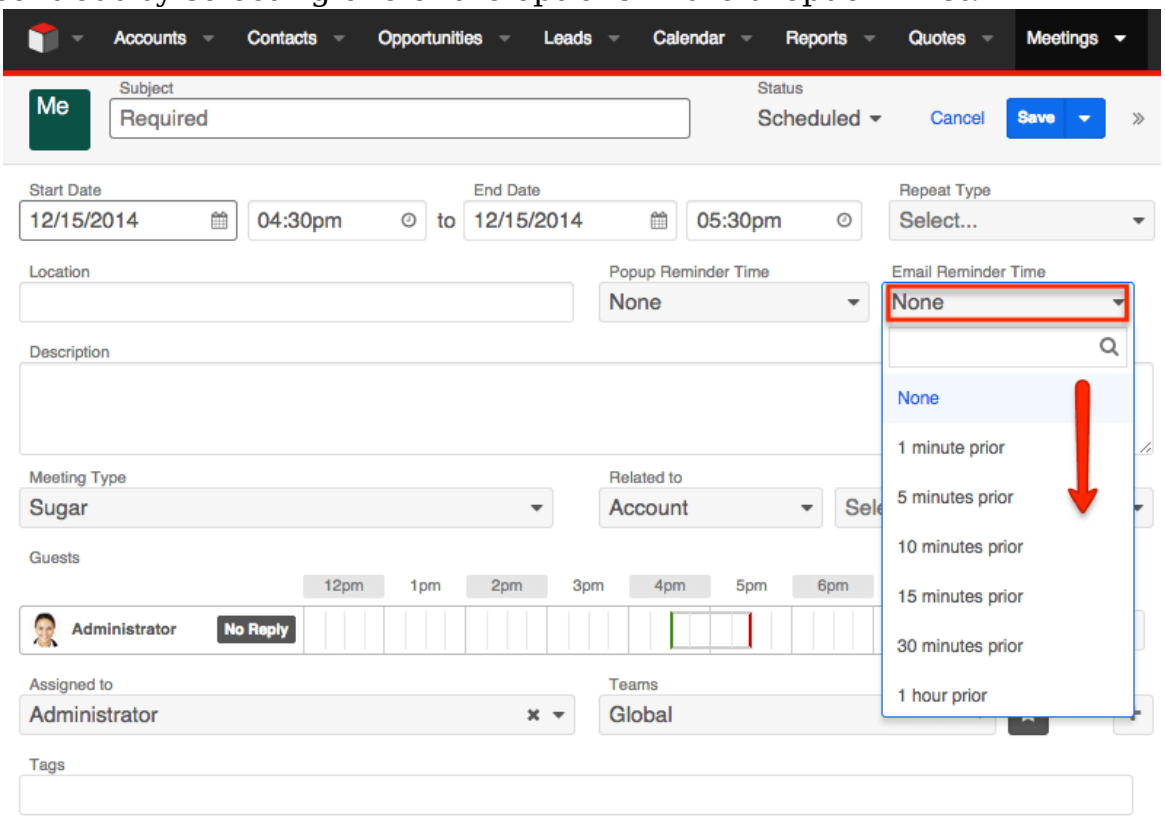
Sugar includes the ability to remind invitees when they have a meeting that is scheduled to begin in a given amount of time. Reminders can be sent via email to all of the invitees prior to the meetings scheduled start date and time. By default, reminders have to be manually added to meeting upon creating or editing the activity. Users can configure their default reminders via their User Preferences, which will automatically select the default reminder time in the Reminders field.

The instance's outbound mail server must be configured via Admin > Email Settings in order for email reminders to be sent out. For more information on setting up the system email settings, please refer to the Email documentation in the Administration guide.

## Email Reminders

Email reminders are scheduled upon creation of or while editing a meeting record. The email reminders are emailed to all invitees, including non-Sugar users.

Select the Email Reminder Time field and set the time for the reminder email to be sent out by selecting one of the options in the dropdown list.

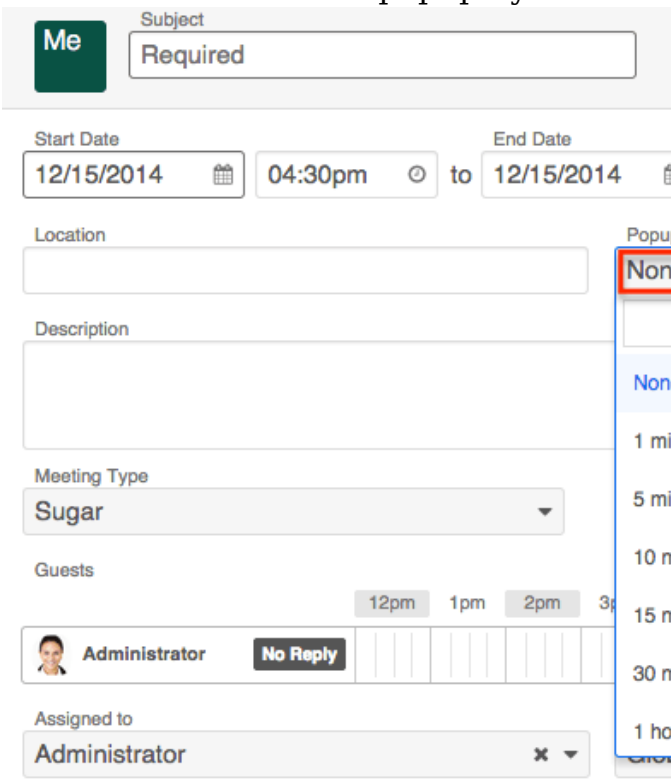



## Popup Reminders

Popup reminders are also scheduled upon creation of or while editing a meeting

record. Popup reminders will appear for all Sugar user invitees who are logged into Sugar in an open browser window.

Select the Popup Reminder Time field and set the time for the reminder popup by selecting one of the options in the dropdown list.



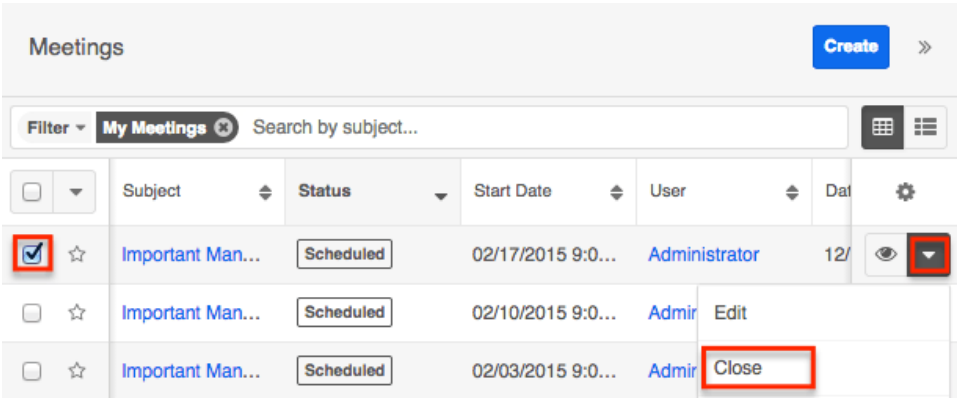

## Closing Meetings

Once a meeting has taken place or is complete, users can edit the Status field to "Held" while on the record view. Outside of the directly editing the field, Sugar provides users with alternative options to close meetings as "Held" via the list view or record view. Please note that the Close option will only appear on the list view or record view if the meeting currently has a status that does not equal "Held".

### Closing Via List View

Use the following steps to close a meeting record via the list view:

1. Navigate to a meeting record's list view.
2. Use the Module Search to find the Meeting record(s) you wish to close.
3. Click the Record Actions Menu to the far right of the record's row and select "Close".




4. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

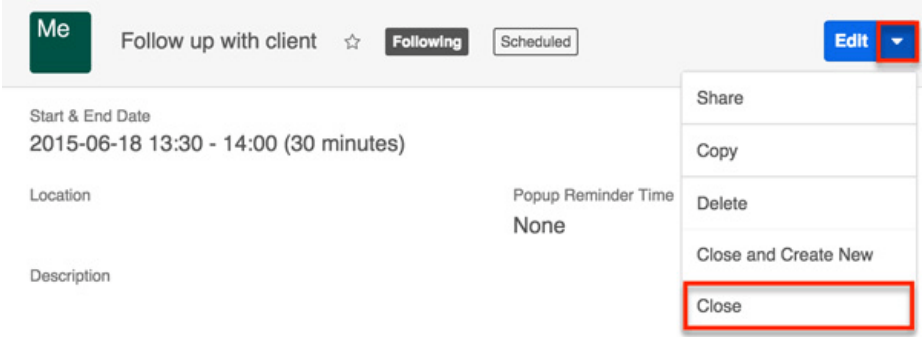
Once the meeting is closed, the status of the meeting record will change to "Held".

Please note that open or upcoming meetings appear in the Meetings subpanel and the Planned Activities dashlet on the invitees (e.g. Contacts, Leads) record view. Once a meeting is marked as held, the meeting will instead appear in the History dashlet and the status will display "Held" in the Meetings subpanel.

## Closing Via Record View

Use the following steps to close a meeting record via the record view:

1. Navigate to a meeting record's view.
2. Select "Close" from the Actions menu.

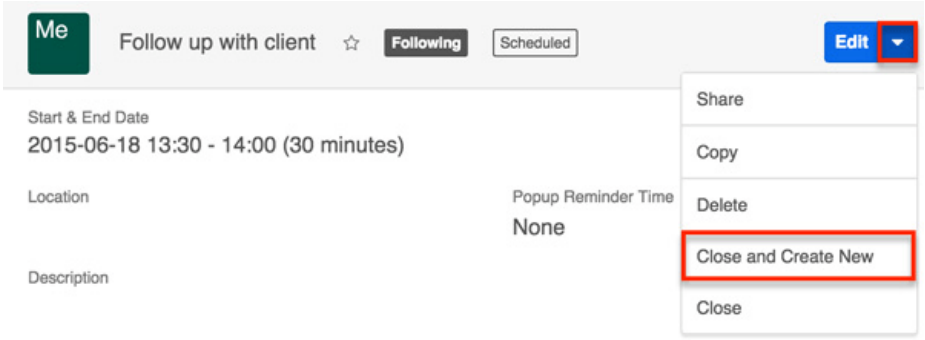



Once the meeting is closed, the status of the meeting record will change to "Held" and the Close option will no longer appear in the Actions menu.

## Closing and Creating New Meeting

The Close and Create New option in the Meetings record view allows you to close the current meeting record as "Held" and create a new copy of the meeting. The displayed record view is pre-populated with the original meeting's values except

for the status, which will display "Scheduled" by default. This option may be useful if you are logging a meeting that has already taken place and need to create a new meeting record for the same contact, lead, etc. using similar information.

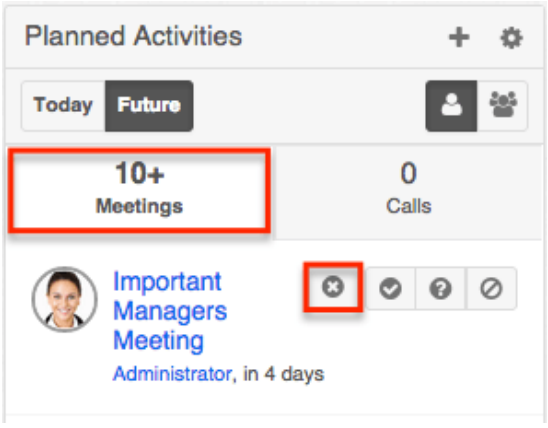



Please note that the Close and Create New option will only appear if the meeting currently has a status that does not equal "Held".

## Closing Via Dashlet

Use the following steps to close a meeting record via the Planned Activities dashlet:

1. Navigate to a module record view's (e.g. Contacts) intelligence pane.
2. Click the Meeting tab on the Planned Activities dashlet then locate a meeting record to close.
3. Click the Held button to the right of the meeting's row in the dashlet.



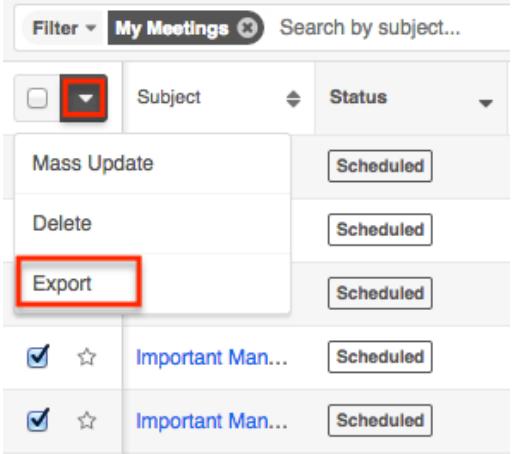

4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

Once the meeting is closed, the meeting will appear in the History dashlet on the record's intelligence pane and the status will display "Held" in the Meetings subpanel.

## Exporting Meetings

Sugar's Export option allows users to download all fields for the selected meetings to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Meeting data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered meetings back into Sugar. For more information on updating existing records via import, please refer to the Import documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of meetings records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Meetings may be exported from the Meetings list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for meetings and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.




Please note that your ability to export meetings from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

# Mass Updating Meetings

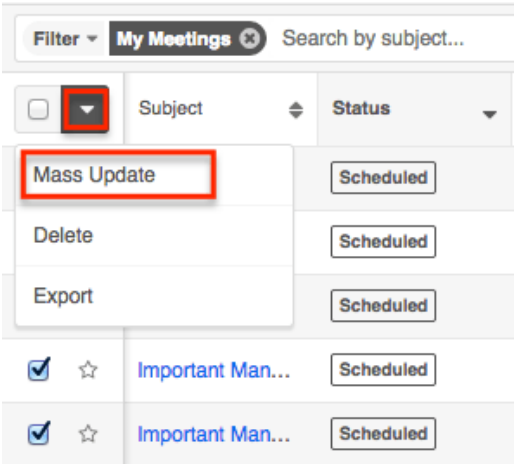
Mass Updating allows users to make the same change to multiple meeting records at once from the Meetings list view. Users with administrator or developer level access can control which fields are available to change during mass update via Admin > Studio. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide. You can use the Select All feature in the list view, which will allow you to easily select the first 1000 records

in the result set. If you wish to update more than 1000 records or update a specific group of records on the list view, please use the filter option in module search to perform the updates in smaller batches.

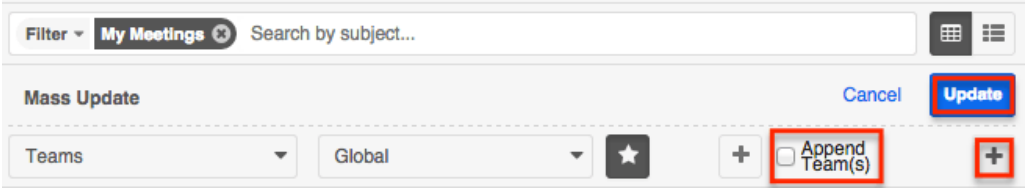
Please note that your ability to mass update meetings may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

Use the following steps to mass update meeting records from the list view:

1. Navigate to the Meetings list view by clicking the Meetings module tab.
2. Use the list view's Module Search to identify meetings you wish to modify.
3. Select the desired meetings then choose "Mass Update" from the Actions menu.




4. The Mass Update panel will appear below the search bar. Set values for the field(s) you wish to alter.
   - To add additional fields for mass update, click the Plus icon to the right of the dropdown list.
   - Note: For the Teams field, mark "Append Team(s)" to add the teams specified here to any existing team assignments. Not marking the checkbox will replace the existing team assignment with the new one.




5. Click "Update" to save the changes to all of the currently selected meeting records.

Note: The available fields for Mass Update for the Meetings module are Assigned to, Related to, Teams, and Status.

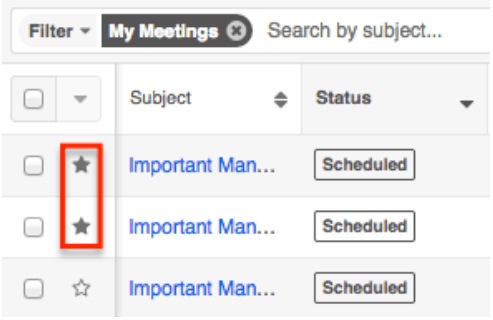
# Favoriting Meetings

Each Sugar user has the option to designate their own favorite meetings which are important or will be viewed often so that they can easily be accessed via search or from the Meetings module tab. Once records are marked as favorites, select "My Favorites" from the Filter option next to the Search bar to retrieve your favorites or select from your most recent favorites directly from the Meetings module tab.

## Favoriting Via List View

Use the following steps to mark records as favorites via the Meetings list view:

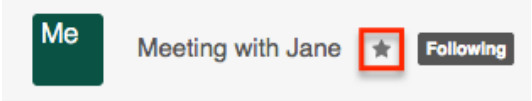
1. Navigate to the Meetings list view by clicking the Meetings module tab.
2. Use the Module Search to find the Meetings records you wish to mark as favorites.
3. Mark the star icon on the left of each desired meeting's row.
4. To remove the meeting as a favorite, click the star again to revert it to white.




## Favoriting Via Record View

Use the following steps to mark records as favorites via the Meetings record view:

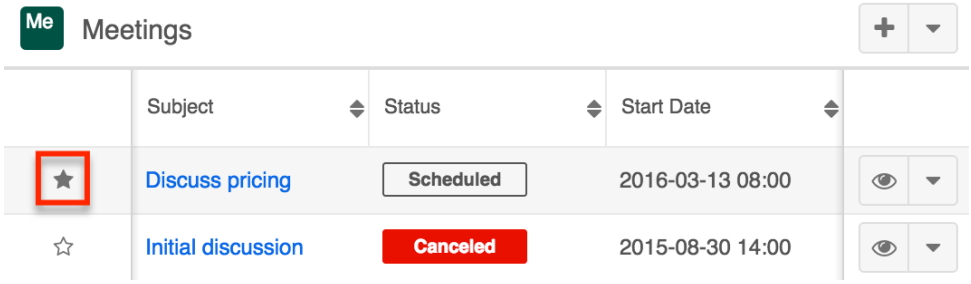
1. Navigate to a meeting's record view.
2. Click the star icon to the right of the meeting's name in the upper left of the record view to designate it as a favorite.
3. To remove the meeting as a favorite, click the star again to revert it to white.




## Favoriting Via Subpanel

Use the following steps to mark meetings records as favorites via the subpanel in related modules:

1. Navigate to a related module's record view.
2. Click the star icon to the left of the desired record's row in the Meetings subpanel.




3. To remove the meeting as a favorite, click the star again to revert it to white.

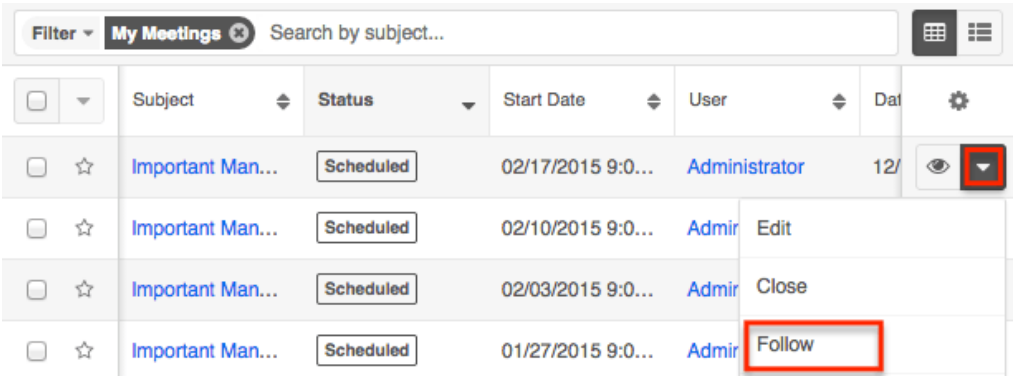
## Following Meetings

Users can also choose to follow specific meeting records to which they have access to in Sugar by clicking the Follow button to the right of the meeting's name. This allows each user to personalize their activity stream by specifying which records' posts should appear on the activity streams displayed on their Home page and Meetings list view. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. Should a user lose access to a record in Sugar, they will automatically stop following that record.

### Following Via List View

Use the following steps to mark a record to follow via the Meetings list view:

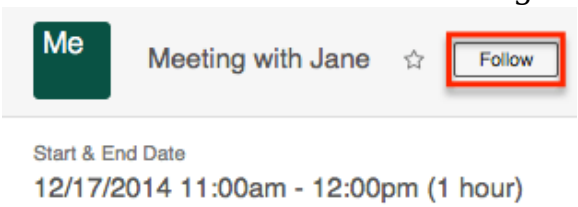
1. Navigate to the Meetings list view by clicking the Meetings module tab.
2. Use the Module Search to find the Meeting records you wish to follow.
3. Click the Record Actions menu to the far right of the records row and select "Follow".
4. To stop following the meeting, click the Record Actions menu then select "Unfollow".



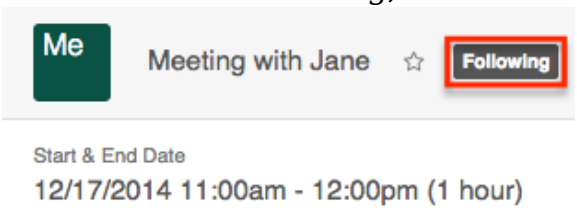

## Following Via Record View

Use the following steps to mark a record to follow via the Meetings record view:

1. Navigate to an Meetings record view.
2. Click the Follow button to the right of the meeting name.

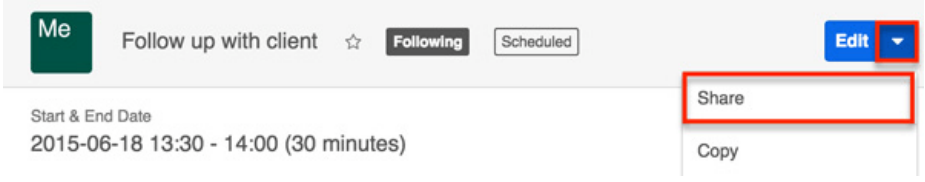



3. To unfollow the meeting, click the Following button again to revert it to gray.




# Sharing Meetings

Individual Meeting records can be shared with other users in your organization by sending an email with the record's link directly from the record view. In the meeting's record view, select "Share" from the Actions menu which will open a Compose Email window including the URL of the meeting record. Enter the recipient(s) email address in the To field then click "Send".



Users can simply click the link in the email to access the meeting record in Sugar. Please note that the user must be logged into Sugar in order to access the record. Users will only be able to view the shared record as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

Last Modified: 03/08/2016 03:18pm

# Emails

## Overview

Sugar's Emails module allows users to receive and send email through the application using their personal email address or a group inbox. Users have the ability to view email through Sugar and also the ability to store email in Sugar. Email stored in Sugar may then relate to other Sugar records such as contacts, cases, accounts, and many others. This documentation will cover how to use the Emails module as well as the various actions and options available from within the module.

## Email Fields

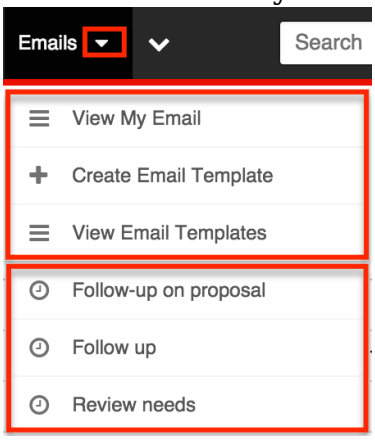
The Emails module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.

| Field | Description |
|---|---|
| Assigned To | The Sugar user assigned to the email |
| Teams | The Sugar team(s) assigned to the email record |
| Date Sent | The date the email was sent |
| From | The email address the email was sent from |
| To | The email address(es) the email was sent to |
| Cc | The email address(es) the email was copied to |
| Bcc | The email address(es) the email was |

| | |
|---|---|
| | blind copied to |
| Subject | The subject of the email |
| Body | The content of the email |
| Attachments | Any attachments included with the email |
| Related To | The module and record that is related to this email<br>Note : This will decide which module this email will show in the History subpanel |

## Emails Module Tab

The Emails module tab is typically located under the More tab on the navigation bar at the top of any Sugar screen. Depending on your settings, you may have to click "Show More" in order to see the Emails module tab. Click the tab to access the Emails list view. You can also click the triangle on the Emails module tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of emails you last viewed in the module.




The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|---|---|
| View My Email | Opens the list view layout to search and display emails |
| Create Email Template | Opens the edit view layout to create a new email template |
| View Email Templates | Opens the list view layout to search and display email templates |

If you do not see the Emails module tab in Sugar, please check the following:

- The Emails module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Emails module in the Hide Modules list, simply move it to the Display Modules list and save. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Emails module for your entire Sugar instance. Reach out to your Sugar administrator to have the Emails module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

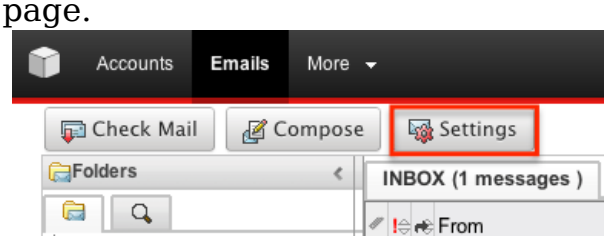
## Prerequisites

There are several key components that need to be configured to enable sending and viewing personal email in Sugar. Some prerequisites need to be configured by a Sugar administrator and some need to be configured by the end users themselves. Please ensure the following is configured before utilizing the emails module:

- Personal Email Settings : To view and import personal email into Sugar, each user must configure the settings in the Emails module with their personal email account information. For more information on how to configure your personal email settings, please refer to the Configuring Mail Accounts section in this document.
- Outbound Email Settings : To send email through Sugar, users need to have an outgoing email account configured. Administrators have the option to allow the system outgoing email account to send email for the users. For more information on configuring an outbound email account, please refer to the Configuring Outgoing Mail Servers section in this document.
- Group Email Settings : Sugar administrators need to configure any group handling email accounts before users can access them. For more information on setting up a group email account in Sugar, please refer to the Email documentation in the administration guide.
- Inbound Email Scheduler : The inbound email scheduler needs to be configured and running in order to pull Group email accounts into Sugar. For more information on setting up and configuring the inbound email scheduler, please refer to the Schedulers documentation in the administration guide.

## Settings

Settings in the Emails module enable you to manage how you view and compose emails. Some settings are pre-configured with default values and some settings are optional. You can customize these settings to suit your requirements. The Settings window displays tabs for General settings and for Mail Account settings. To access the Emails module settings, simply click the Settings button towards the top of the page.

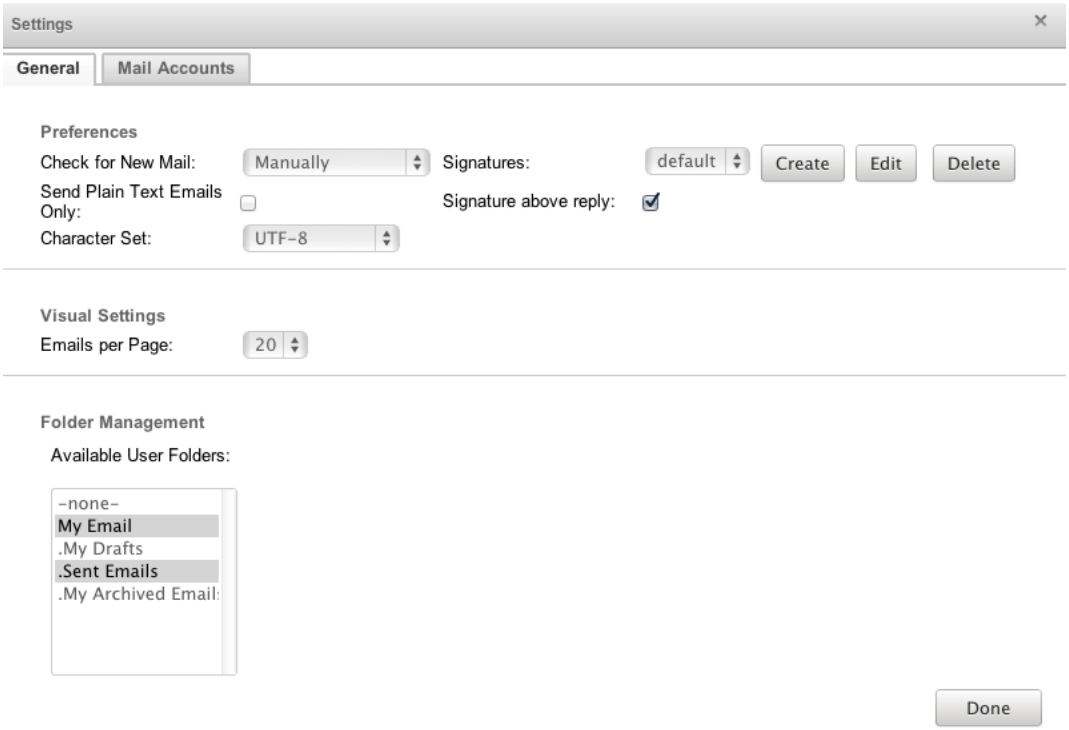



Note : Many settings require you to reload the Emails module page before the settings take effect.

## General Settings

The General Settings tab displays options to specify the character set, signature, automatic or manual checks for incoming emails, etc. Some of these settings have default values which you can modify. General Settings apply to all your personal mail accounts in Sugar and will not apply to group email accounts.
The options in the General tab have the following functions:

- Check for New Mail : Select a time interval from the dropdown list to check your mail accounts for new email (Manually, Every 5 minutes, Every 15 minutes, etc.). The default setting is to check email 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 dropdown list. The default setting is UTF-8.
- Signatures : Select an existing Signature from the dropdown or select "Create" to create a new signature. The signature selected will appear by default on all outgoing email. Before sending you do have the option to change or remove the signature from the email.
- Signatures Above Reply : Check this box to place your signature above the content of the email to which you are replying to. Alternatively, the signature will appear below the content of the email to which you are replying to.
- Emails Per Page : Select the count of emails to display per page from the dropdown (10,20,50). The default setting is 20.
- Available User Folders : Select the options you wish to display in the Folders panel on the left side of the Emails module. Folders with a period preceding the name are subfolders. For example : ".My Drafts", ."Sent Emails", and ".My Archived Emails" are subfolders of "My Email". When selecting a subfolder the parent folder will automatically be selected as well.



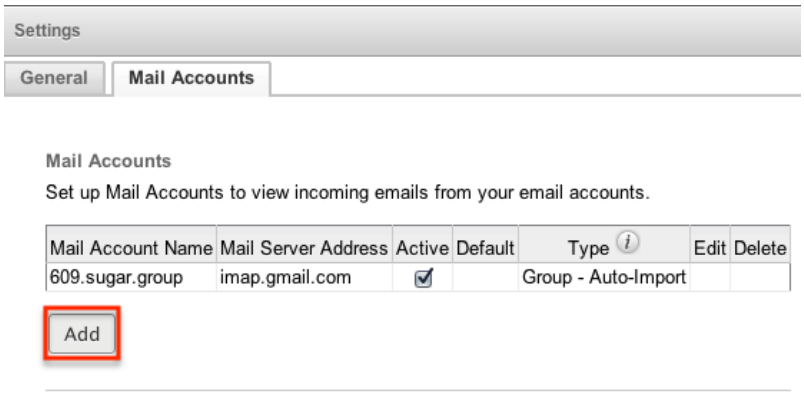

## Mail Accounts

The Mail Accounts tab allows users to manage their mail accounts and outbound mail servers.

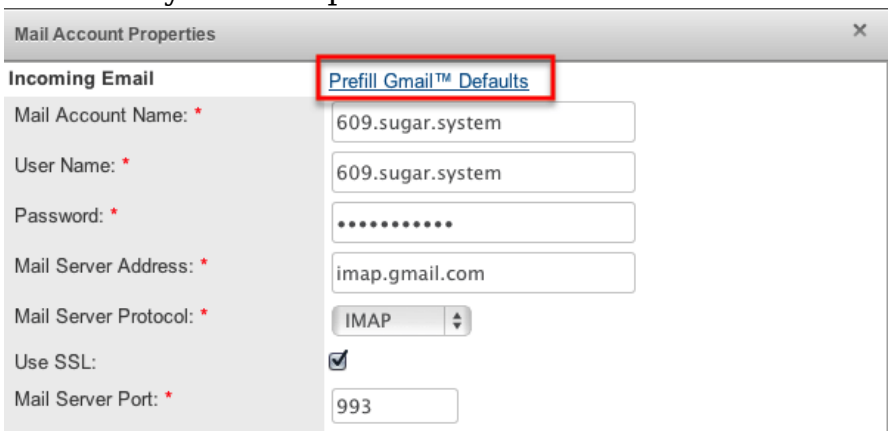
### Configuring Mail Accounts

Sugar allows users to link one or more personal mail accounts to view within Sugar. Email from these external accounts can then be imported into Sugar and linked to existing records throughout the application. Group mail accounts work the same, but allow multiple users access to the incoming email. For more information on how to add a group mail account, please refer to the Email documentation in the administration guide.
Use the following steps to add a new personal mail account to the emails module:

1. Navigate to the Mail Accounts tab on the Settings screen.
2. Click "Add" under the Mail Accounts section.

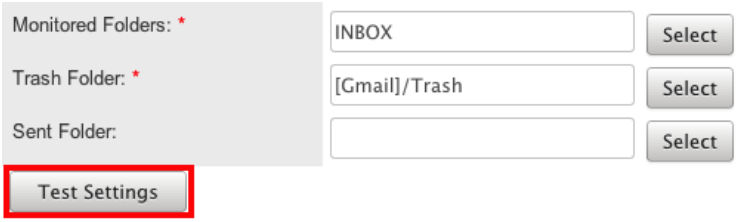



3. Select "Prefill Gmail Defaults" to automatically populate the following fields with Gmail default values in the Incoming Email section or enter appropriate values for your mail provider:

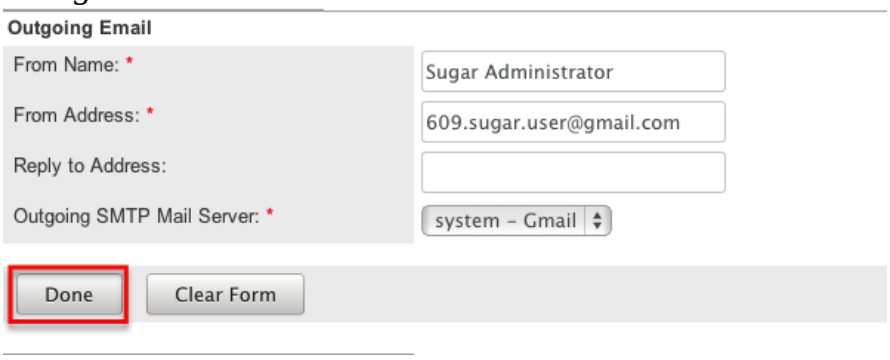



   - Mail Account Name : The name or designation of the account.
   - User Name : The user name for your external account.
   - Password : The password for your external account.
   - Mail Server Address : The web address of the external email server from which emails will be viewed in Sugar.
     Note : If you are unfamiliar with these terms and values, please check with your IT department or email provider for the appropriate values for these fields.
   - Mail Server Protocol : The mail protocol used to communicate with the mail server. IMAP is the default selection and provides the best functionality with Sugar.
   - Use SSL : Check this box to force the connection and communication between Sugar and the mail server to use a secure socket layer of encryption.
   - Mail Server Port : The communication port number used for connecting to the mail server.
   - Monitored Folders : The folders in your external account that Sugar will monitor. Inbox is selected by default. To select one or more folders to monitor click "Select" and then pick the folders in your external account for Sugar to monitor.
   - Trash Folder : Select a folder from your external account to be designated as the trash folder. Sugar will place deleted emails into this

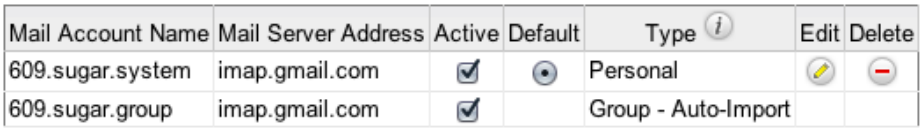
folder on your external account.
    - Sent Folder : Select a folder from your external account to store any email being sent from that account through Sugar. Select "Test Settings" to verify the Incoming Email settings. A window will popup indicating if the test was successful or not.




4. Enter appropriate values in the following fields in the Outgoing Email section:
    - From Name : The name outgoing email will come from. Defaults to your first and last name from your user profile.
    - From Address : The email address outgoing email will come from. Defaults to the email address from your user profile.
    - Reply to Address : The email address that will receive any replies from your email. If left blank, replies will be sent to the From Address.
    - Outgoing SMTP Mail Server : Select an existing SMTP server from the dropdown list or select Add to specify a new SMTP server. For more information on adding an outgoing SMTP mail server, please refer to the
5. All required fields are marked with a red asterisk and must be completed prior to saving.
6. Once the necessary information is entered, click "Done" to preserve the changes.




In the mail accounts section you will see any personal and group accounts you have configured.




The buttons and checkboxes in the grid will perform the following actions on the mail account:

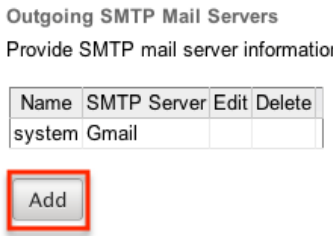
- Active : Select this checkbox to either show or hide a mail account in your view of the Emails module. When you deactivate a mail account, the account

is not listed on the Folders tab and emails from that account will not display in the Sugar inbox.
- Default : When you have multiple personal email accounts configured, one must be set as the default. When sending email, the "From Name" and "From Address" entered on the default mail account will be automatically selected.
- Type : Displays whether this email account is a group or personal email account.
- Edit : Click the Pencil icon to open the personal account in a popup window to view or edit the details.
  Note : Only administrators can modify group accounts. For more information on how to add or modify a group account, please refer to the Email documentation in the administration guide.
- Delete : Click the Minus icon to remove the personal account from Sugar.

## Configuring Outgoing Mail Servers

Outgoing mail servers are what allow users to send email through Sugar. Sugar allows users to configure multiple outgoing mail servers to send email from. Users have the ability to use the system's outgoing mail server with their own user name and password. If Sugar is not configured with a system outbound account, users may create a personal inbound account to pair with their personal outbound account in order to send emails.
Administrators also have the ability to allow users to use the system user name and password configured in Admin > Email Settings. For more information on how to configure the system outgoing mail server, please refer to the Email documentation in the administration guide.
If the Sugar administrator has disabled the ability to use the system account for outgoing email, then users will need to enter their user name and password for the mail server in their user profile. For more information on how to enter credentials for the system mail server through the user profile, please refer to the Getting Started documentation.
Use the following steps to add a new outgoing mail account from the Emails module:

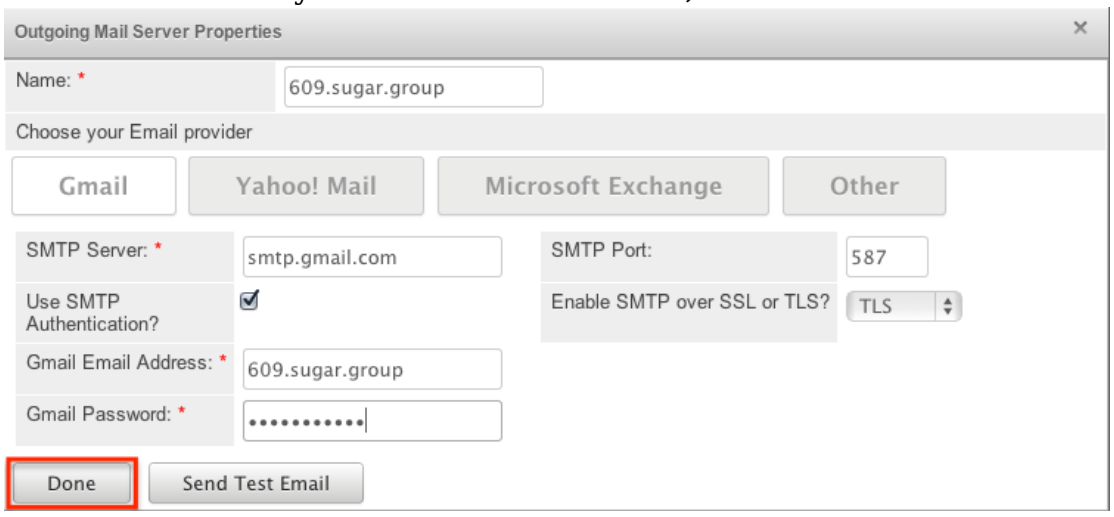
1. Navigate to the Mail Accounts tab on the Settings screen.
2. Click "Add" under the Outgoing SMTP Mail Servers section.



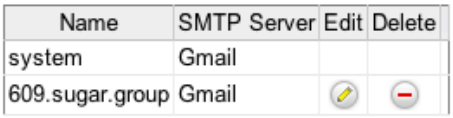

3. Enter appropriate values in the following fields in the Incoming Email section:
   - Name : The name or designation of the outgoing mail server.

- Choose Your Email Provider : Choose your mail provider to populate provider specific values.
- SMTP Server : The web address of the external email server Sugar will connect to.
- SMTP Port : The communication port number used for connecting to the mail server.
- Use SMTP Authentication? : Check this box to connect to the SMTP server using a user name and password. If left unchecked, the SMTP server must accept anonymous connections, which is not recommended.
- Enable SMTP over SSL or TLS? : Select the appropriate option from the dropdown to use Secure Socket Layer, Transport Layer Security, or no encryption when connecting to the mail server.
- Email Address / Username : Enter the email address or user name to connect to the SMTP server with.
  Note : The user name used to connect to the SMTP server can be different than the From Address being specified, but the email server needs to be configured properly to allow that account to send email as that email address.
- Password : Enter the password associated with the entered email address or user name.

4. All required fields are marked with a red asterisk and must be completed prior to saving.
5. Optionally click "Send Test Email" to test the settings entered by sending an email.
6. Once the necessary information is entered, click "Done".




In the Outgoing SMTP Mail Servers section you will see any mail servers you have configured.




The buttons in the grid will perform the following actions on the mail server settings:

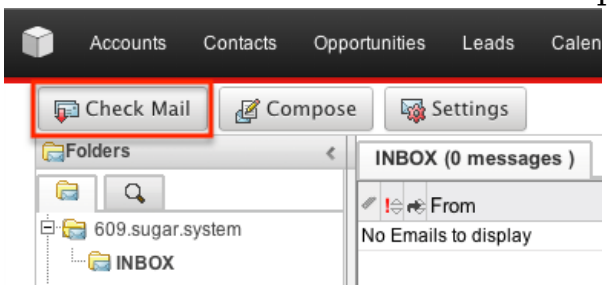
- Edit : Click the Pencil icon to open the settings in a popup window to view or edit the details.
  Note : If the ability to use the system account is enabled, the pencil icon will not be available here on the system mail server settings. Alternatively, if the system account is disabled for users, then editing the information here will change the information in your user profile.
- Delete : Click the Minus icon to remove the mail server from Sugar.
  Note : The system outgoing mail settings cannot be removed.

For more information on configuring the system outgoing mail server settings and allowing users to use the system account, please refer to the Email documentation in the administration guide.

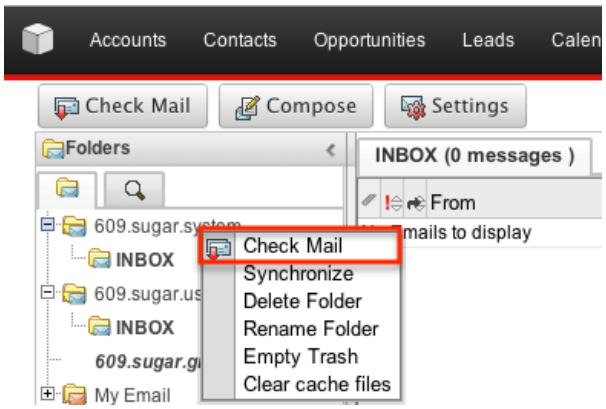
## Checking Emails

Sugar provides a couple of different ways to check email accounts within the application. Group email boxes are automatically checked and imported via schedulers. For more information regarding settings up schedulers, please refer to the Schedulers documentation in the administration guide.
Personal mail accounts can be configured to be checked manually. Use one of the following options to check a personal mail account manually:

- Click the Check Mail button at the top of the Emails module page.

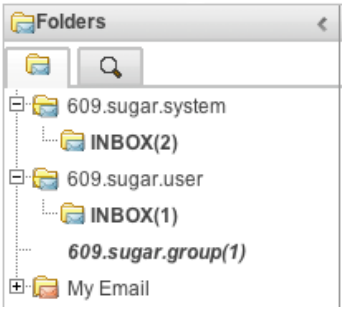



  This will check for new email in each personal account you have configured.
- Right click on the specific personal account you wish to check email for, and select "Check Email"




This will pull new email for only the selected mail account.
Note : Check mail will only pull in new email. If you delete and view email for a personal email account in a mail viewer other than Sugar (Outlook, Gmail, etc.) the changes will not always be reflected in Sugar. To get Sugar to see these changes, right click on the mail account and select "Synchronize".

The monitored folders in each personal mail account show under the associated account in the folder view. The number of unread messages in each folder is shown in parentheses next to the monitored folder's name.




Select the folder name to pull the list of emails in that folder into the email view.

## Composing Emails

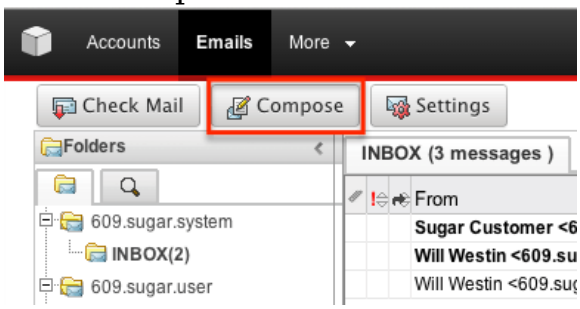
Sugar allows users to compose email from a variety of locations through the application. When you compose an email, if you have configured multiple mail accounts, you can choose the account from which to send the email. This can change the From Name, From address, and Reply To for the email being sent to what is configured on the account you selected. For more information on how to add and configure accounts, please refer to the Mail Accounts section in this documentation.

Emails composed in Sugar can contain plain text or rich text formatting utilizing the TinyMCE text editor. For more information on how to use TinyMCE, please refer to the TinyMCE section in the User Interface document in the Application guide.

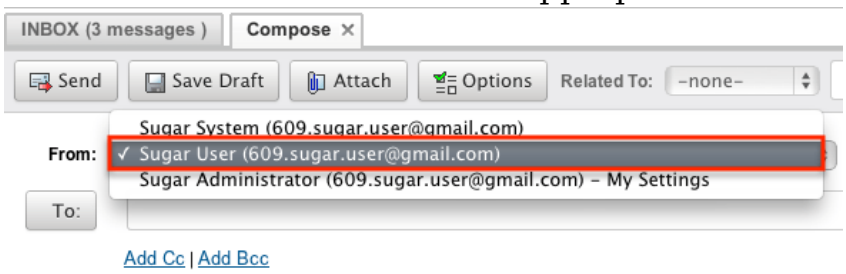
## Composing Via Emails Module

One of the most common methods of composing email is via the Compose button in the Emails module. This opens up the compose layout which allows you to enter in all the relevant information for the email.
Use the following steps to create a compose an email via the Emails module:

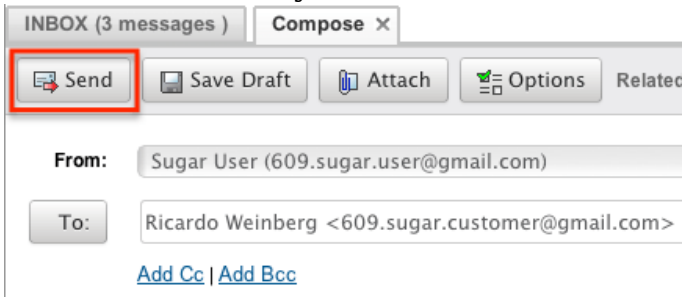
1. Click "Compose"




2. Enter appropriate values for the fields in the layout. All required fields are marked with a red asterisk and must be completed prior to saving.
3. The From is automatically populated with the name and email address for the default mail account. Select the appropriate combination from the dropdown.




4. Once the necessary information is entered, click "Send".

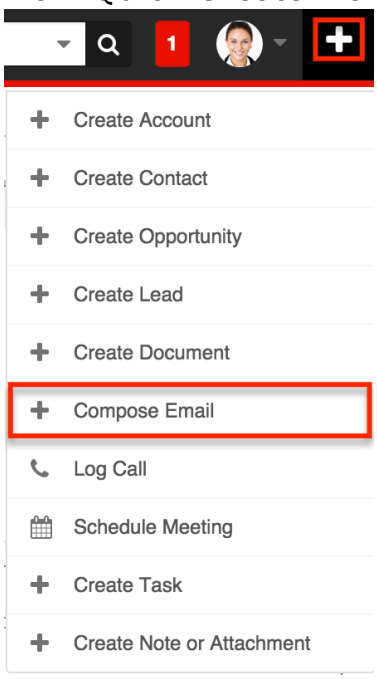
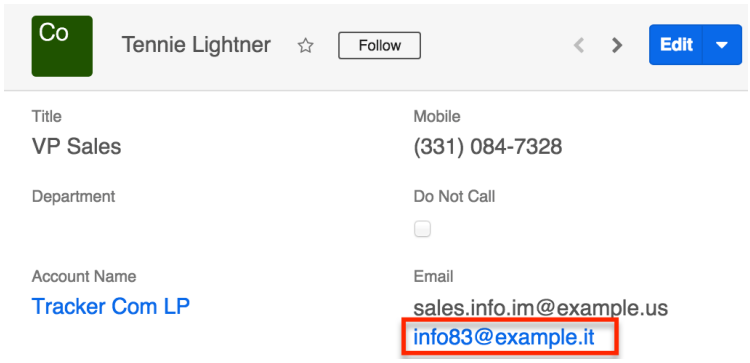
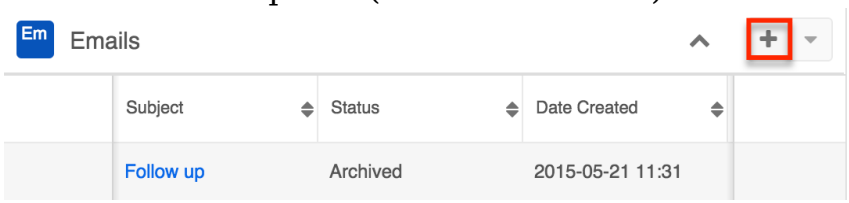



## Composing Via Quick Compose

The quick compose option allows users to easily compose emails from various places (quick create, list view, record view, etc.) in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. Users can also use quick compose by clicking an email address anywhere it is displayed as a

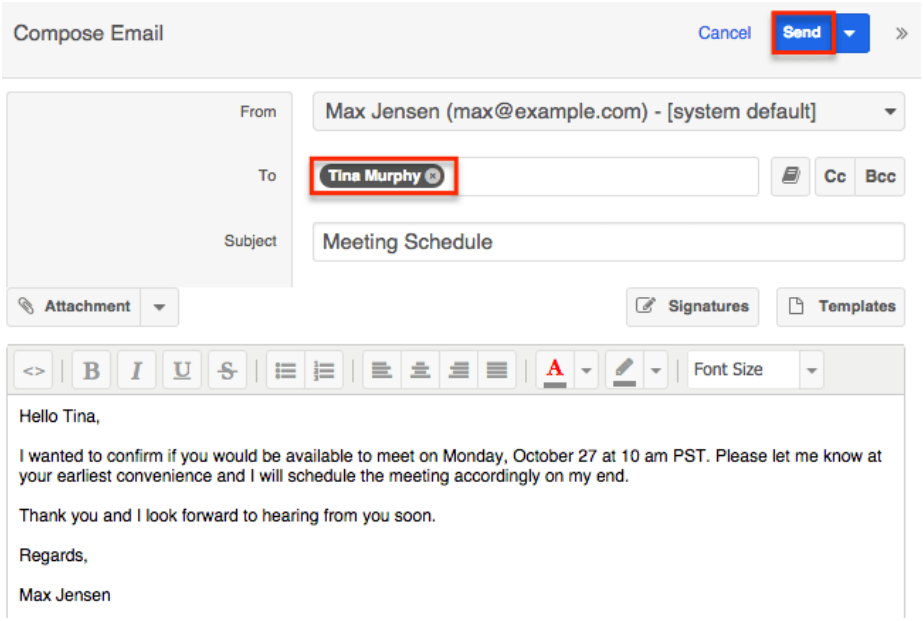
link. In addition, the Emails subpanel (Sidecar modules) and Activities subpanel (Legacy modules) on related module records allows you to create new emails.

Use the following steps to compose an email via Quick Compose:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Compose Email". You can also quick compose emails using the following methods below:
   From Quick Create menu:
   
   
   From Email Address:
   
   
   From Emails subpanel (Sidecar modules):
   
   
   From Activities subpanel (Legacy modules):




2. Enter appropriate values for the fields in the Compose Email form. All required fields will indicate "Required" in the field and must be completed prior to saving.
3. If composing the email via the Activities subpanel, the Quick Compose window will pop-up allowing you to draft and send the email.
4. Once the necessary information is entered, click "Send".
   Note: The email's To field will automatically populate with the record's name and relates the email to the record as well.



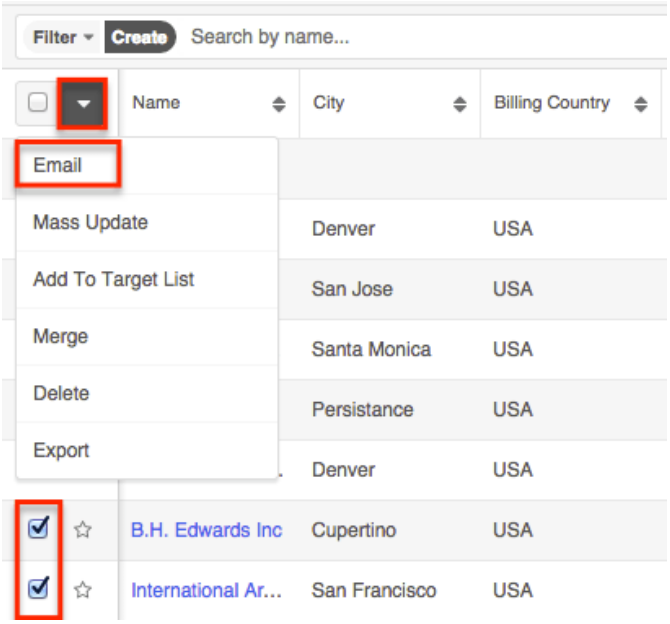

After the email is sent successfully, the email record will appear in the History dashlet (Sidecar modules), Emails subpanel (Sidecar modules), or History subpanel (Legacy modules) accordingly.

## Composing Via Module's List View

For modules which include an Email field, the Email option allows users to compose an email message and send it to one or more records at a time from the module's list view. Simply select the desired record(s) from the list view then choose "Email" from the list view Actions menu. The Compose Email window will open allowing you to enter in all relevant information (e.g. subject, body, etc.). Please note that the email will be sent to the selected record's primary email address on file.

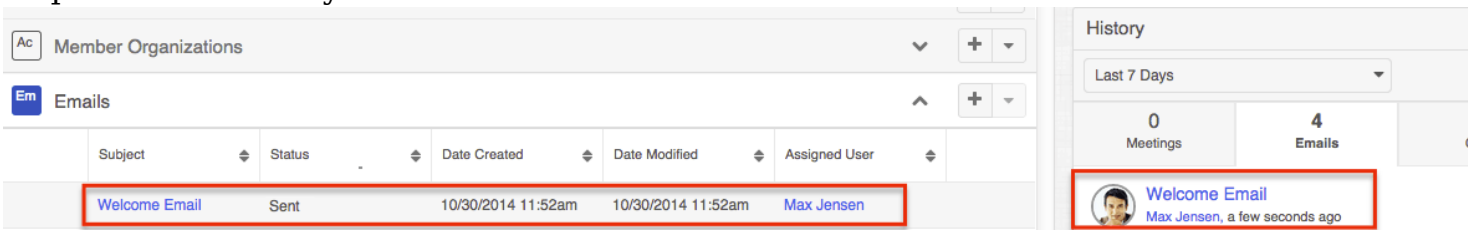
The following steps cover composing and sending an email from the Accounts list view as an example:

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the Module Search to find the account records you wish to include on the email.
3. Select the desired accounts then choose "Email" from the Actions menu.




4. In the Compose Email window, enter in the subject and body of the email message, then click "Send".
    - Note: The email's To field will automatically populate with the name of the selected account record(s).

Once the email is sent successfully, the email record will appear in the Emails subpanel and History dashlet of each account record.

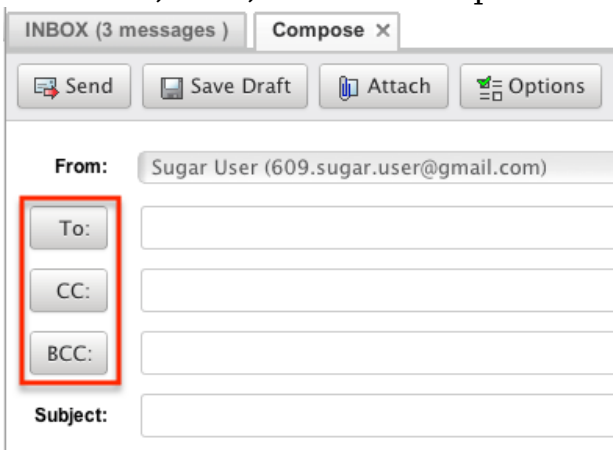



## Adding Recipients

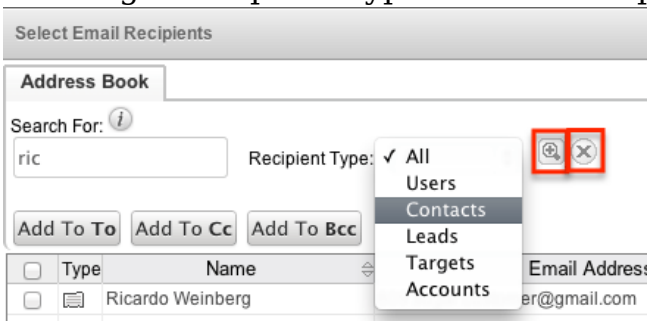
Sugar, just like many other email clients, allows multiple recipients for a single email. Recipients can be placed in the To, Cc, and Bcc sections. To enable the Cc and Bcc sections simply click "Add Cc" or "Add Bcc".
When composing an email, you can select email recipients from the address book, which 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.
Use the following steps to add recipients via the address book while composing an email:

1. Click "To", "Cc", or "Bcc" to open the Address Book.

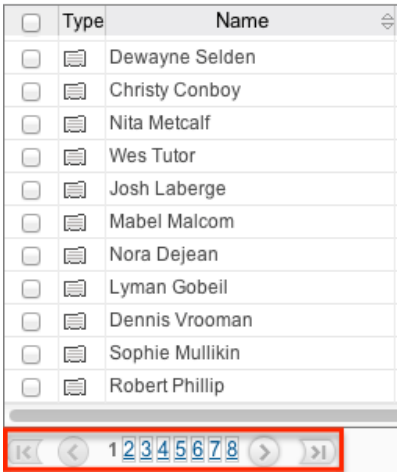



2. The Address Book opens defaulting to showing all. Enter a First Name, Last Name, or Email address to search. You can also narrow the results down by selecting a Recipient Type from the dropdown.




Click the magnifying glass to perform the search and click the "X" to clear the search.

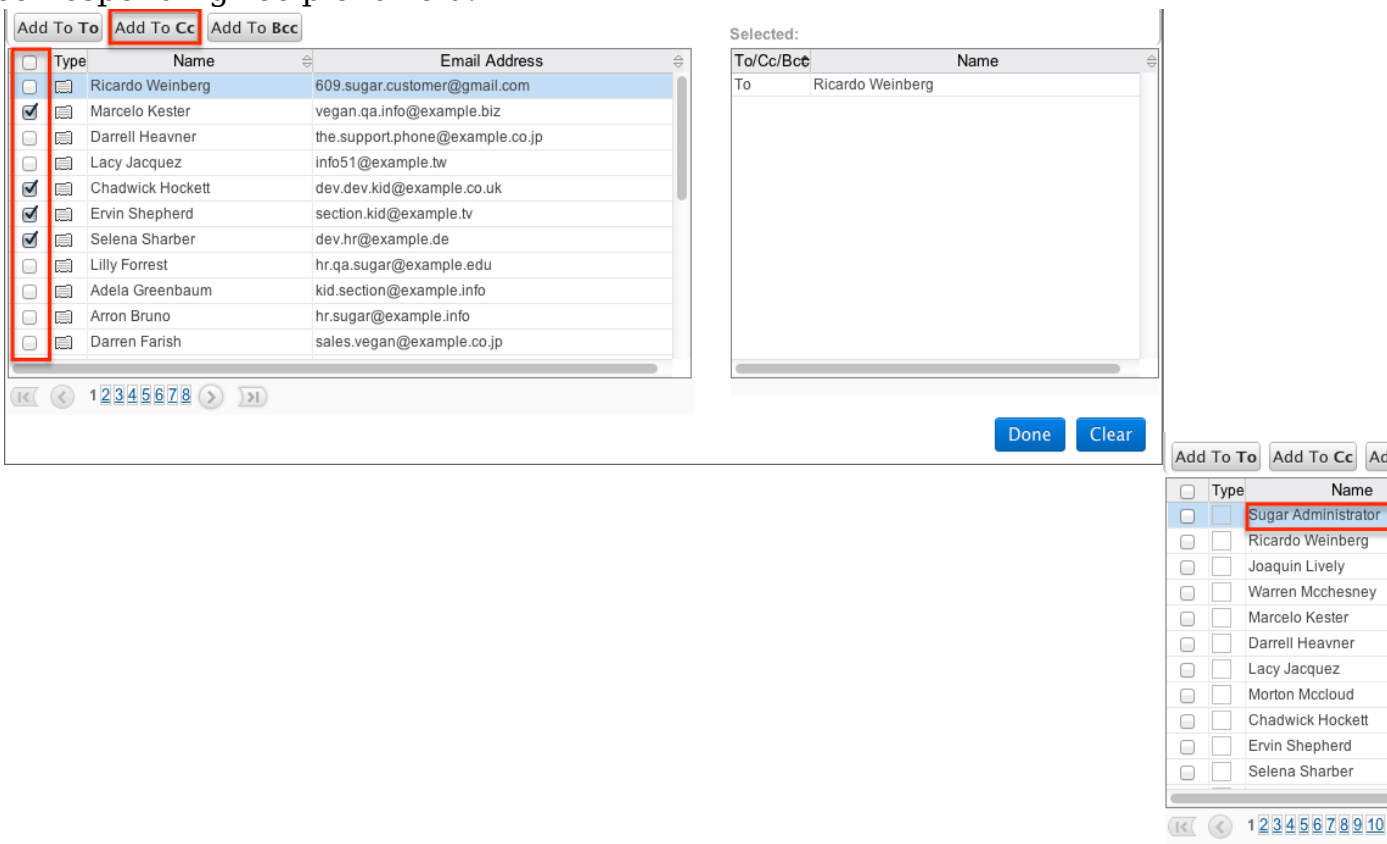
3. The search results show in the grid below. The grid shows 25 records at a time and is paginated.



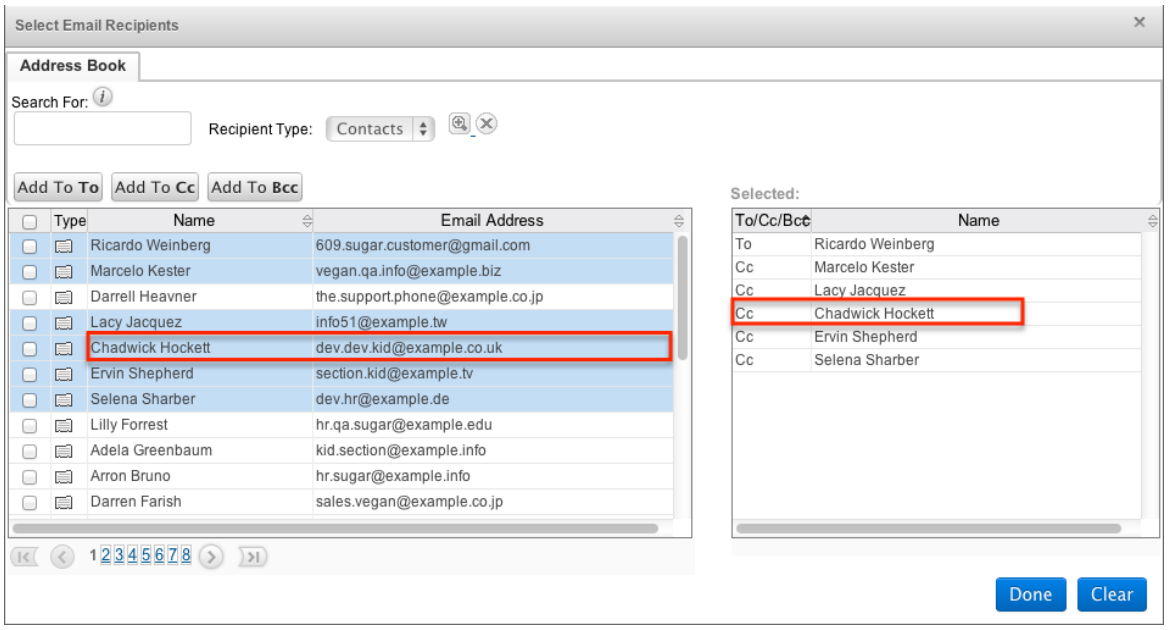
Click the number of the page you wish to view or the single arrows left and right to go back a page and forward a page respectively. You can also select the far right arrow to navigate to the last page or the far left arrow to navigate to the first page of results.

4. Click on a record in the grid to add the record as a recipient in the To field.

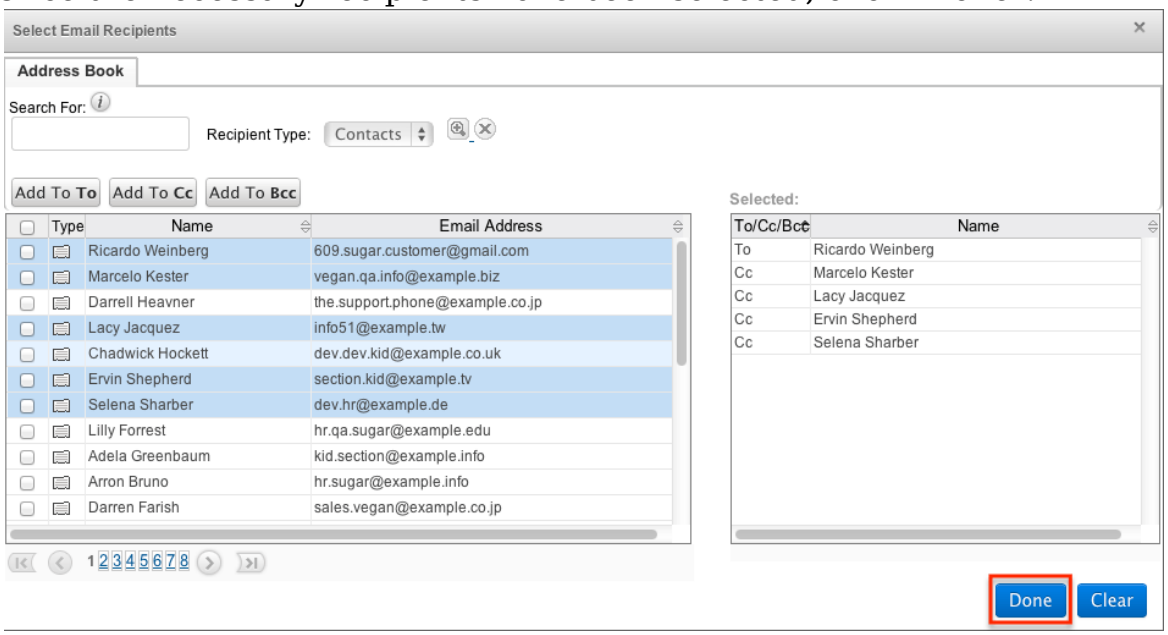
   Select the checkbox next to one or more records and then click "Add To To", "Add To Cc", or "Add To Bcc" to add the selected records to the corresponding recipient field.




5. The records in the grid on the left that have been added as recipients will be highlighted in blue. To remove a recipient, simply click the record in the grid on the left and it will be removed from the Selected recipients grid on the right.




6. Once the necessary recipients have been selected, click "Done".



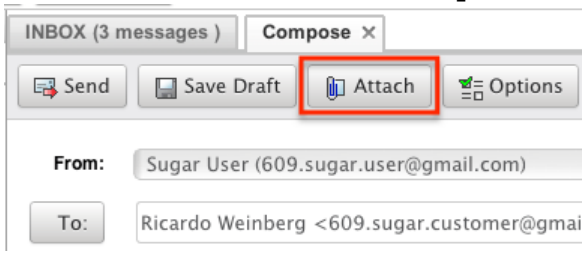

7. Alternatively, you can add recipients by hand by typing in the email address in the recipient fields separated by a semi-colon.

Note : If the email you are composing is related to a record, there is an option in the address book to only show recipients related to the record selected.

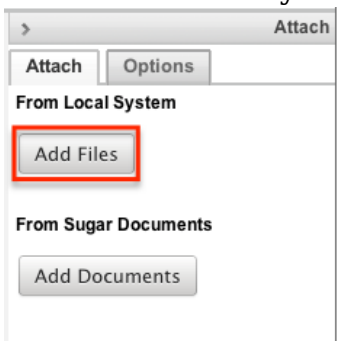
## Adding Attachments

Sugar allows you to send attachments along with your email. Attachments can be files from your local computer or documents from within Sugar.
Use to following steps to add attachments to an email while composing:

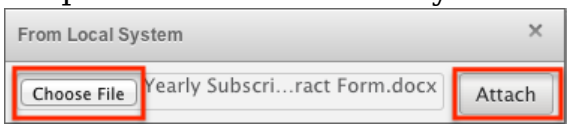
1. Click "Attach" from the Compose screen.




2. This opens the Attach pane on the right side of the window.
3. To add files from your local computer, select "Add Files".

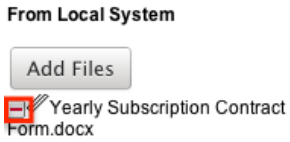



4. In the popup window, select "Choose File" and then navigate your local computer to select the file you wish to attach.

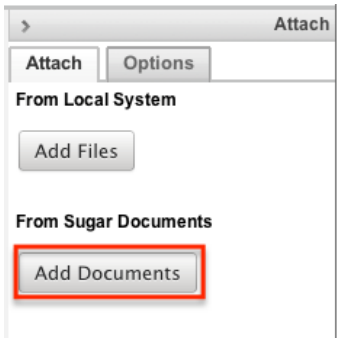



Click "Attach".

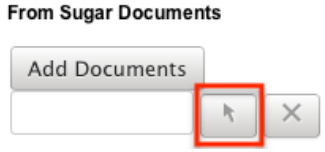
5. Click the Minus icon next to the file name to remove a file from the email.




6. To add documents from within Sugar, select "Add Documents"



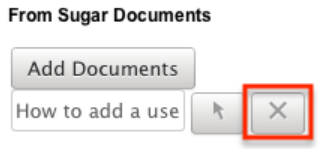

7. Click the Arrow icon to launch the search page on the Documents module.




Note : Documents that link to an external account (i.e. Google Docs, IBM

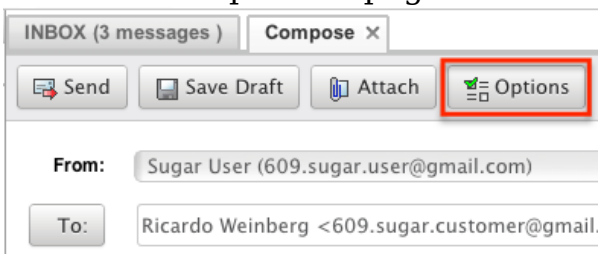
SmartCloud, etc.) cannot be used as attachments in emails composed through the Sugar Email client.

8. Locate the document you wish to attach by searching and then selecting the document.
9. Click the "X" next to the document to remove it from the email.




## Setting Email Options

Sugar comes with some specific options that are available to you while composing email. To access these options while composing an email, simply click "Options" towards the top of the page.

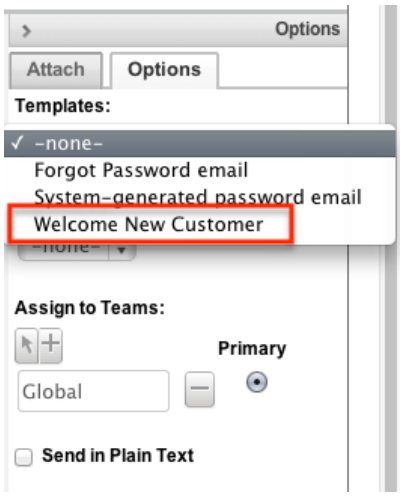



This opens the Options pane on the right side of the page.

### Using a Template

Email templates allow users to create an email based off of a predetermined template. This can reduce typing errors and save time by having common emails prepared into a template. For more information on how to create or modify an email template, please refer to the Email Templates section in this documentation. Use the following steps to utilize a template while composing an email.

1. From the Options pane, select a template to use.



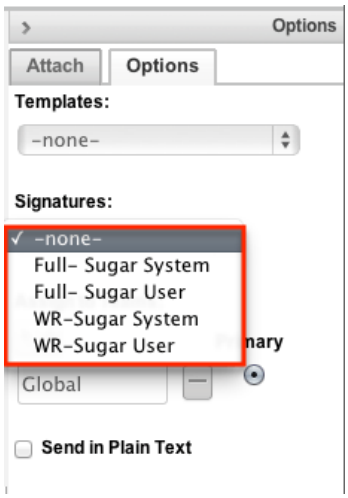

2. Anything currently written in the body or subject of the email you are currently composing will be removed and replaced with the template data.
3. If the selected template has any variable fields defined in it (i.e. $contact_name) then when Sugar sends the email it will replace these variable placeholders with values from the associated record. If no associated record is found, the variable placeholders will be replaced with an empty string.
   Note : If multiple records share the same email address or multiple recipients are on the email, Sugar will pick one of the record's values to place in the email template to send to all of the email addresses. This can provide undesired results. For more information on how to send a dynamic variable to many recipients, please refer to the Campaigns documentation in the Application guide.

Using a Signature

Sugar allows you to create multiple signatures to use when composing email. For more information on how to create or edit signatures, please refer to the General Settings section in this document.

Use the following steps to add a signature while composing an email.

1. From the Options pane, select a signature to use.

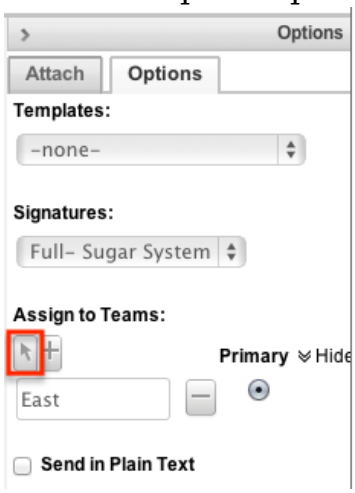



2. Depending on your settings, the Signature will appear below or above any content in the body of the email.

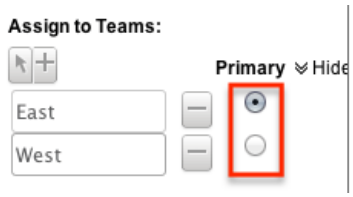
## Setting Teams

By default, Sugar assigns any composed email to your default teams as specified in your user profile. For more information on how to change your default team, please refer to the Getting Started documentation. When composing an email you can change or add teams to the email before sending.
Use the following steps to add or remove teams from an email while composing the email:

1. From the Options pane, select the arrow icon to add a team to the email.




2. Search for and select the desired team in the popup window.
3. Select the Primary option on a team to set the team as the primary for the email.

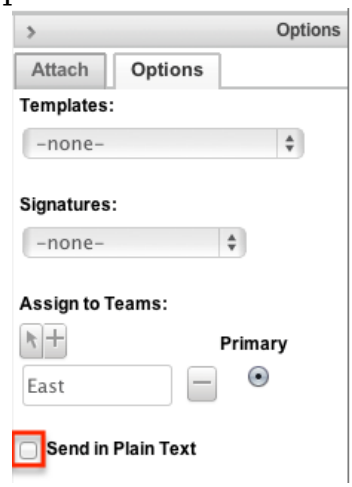



4. Click the minus icon to remove a team from the email.




Sending in Plain Text

By default, Sugar sends email as HTML content. Some email clients can not render HTML content, but prefer email sent as plain text. If there are no images, links, or formatting in your email, then sending it as plain text may be a good option.
To send an email as plain text, simply click "Send in Plain Text" from the Options pane.



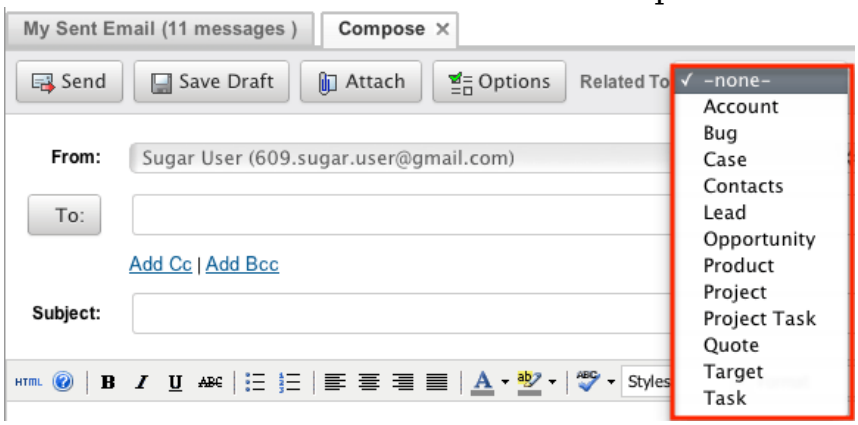

Note : TinyMCE is removed from the compose screen when selecting this option since plain text emails contain no formatting.

## Relating to Records

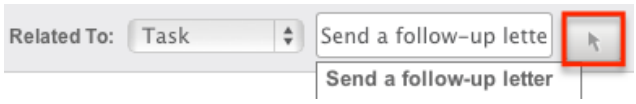
Emails in Sugar are implicitly related to records in Sugar that match an email address in the From, To, or Cc fields in the email. This implicit relationship is made for emails sent from Sugar as well as any email imported into Sugar via Inbound email accounts or email archiving. Any emails that contain the implicit relationship will show in the History subpanel of the related record.
While composing an email, users have the ability to set an explicit relationship via the flex relate field. This allows the new email to be related to a single record from one of many modules.

Use the following steps to set the Related To field while composing an email:

1. Select a module from the Related To dropdown.

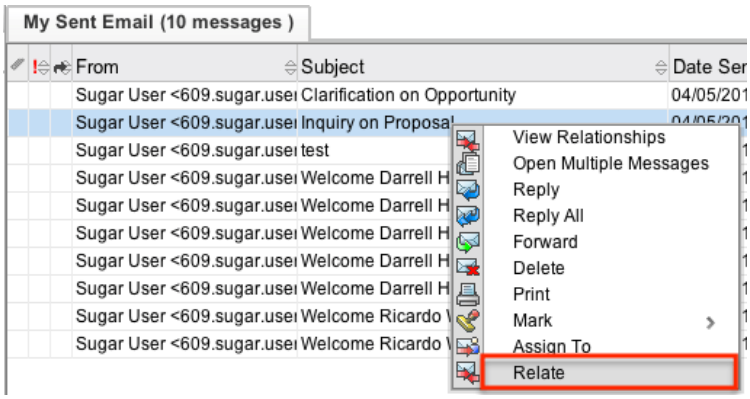



2. In the field next to the dropdown, you can begin typing the name of the record for the specified module. The type ahead feature will show you any results fro mthat module that match what you have typed.
3. Alternatively, you can select the arrow icon to open up a search window for the selected module.



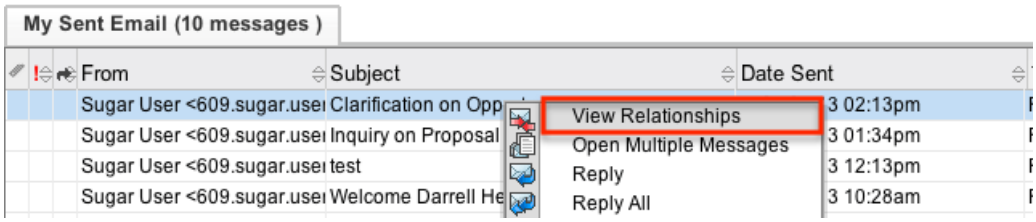

4. Use the search window to locate and select the desired record to relate to the email.
5. This email will now show in the History subpanel of the selected record.

To modify the flex relate for an email, right click on it in the emails module and select "Relate".

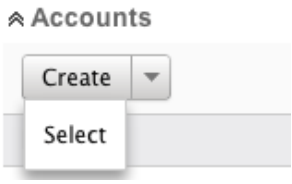



The flex relate field is not the only way to relate an email to records within Sugar. Emails can also be related directly to one or more Accounts, Contacts, and more. Use the following steps to relate an email to other records in Sugar:

1. From the emails module, right click on an email and select "View Relationships"



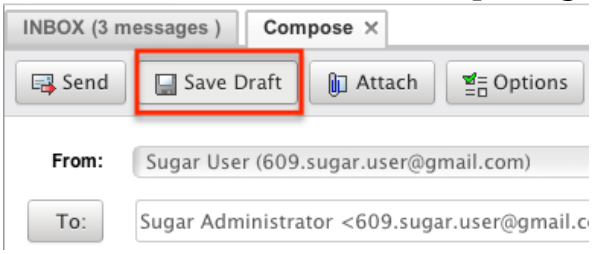

2. This will show the detail view of the selected email with subpanels to multiple modules below the email content.
3. Click "Create" or "Select" from a subpanels action menu to either create a new record or select and existing one to relate to this email.




4. Relating a record to an email this way will also force this email to show up in the related record's history subpanel.

## Saving Drafts

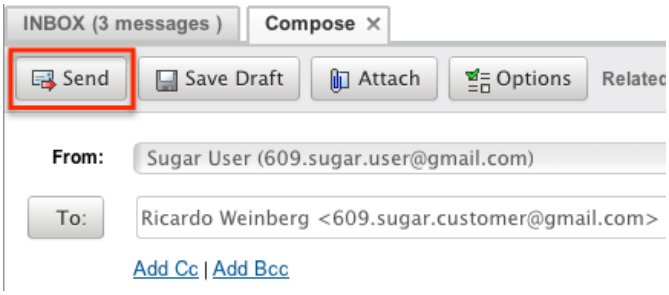
As an alternative to sending an email right away is to saving it as a draft. You can save an email as a draft so you can continue composing it at a later time. To save an email as a draft while composing, simply click "Save As Draft".




Any emails saved as drafts can be retrieved from the folder pane under "My Emails" > "My Drafts". Any recipients added, templates used, and signatures used on the email are all saved in the draft.

## Sending

To send an email to the recipients added on the To, Cc, and Bcc fields, simply click "Send".




Sent emails will use the settings configured to connect to your external mail server to send the email. A copy of every email sent will be in the folder pane under "My Emails" > "My Sent Email".

## Viewing Emails

There are various options available for viewing email in Sugar including via Emails Module, Emails detail view, Emails Recently View menu, dashlets, and reports. Sugar allows users to view email from their personal accounts and to import email into Sugar. Once an email is imported into Sugar it is treated just like any other record in Sugar. Please note that you will only be able to see email imported into Sugar as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.
Note : Group email accounts are automatically imported into Sugar.

### Viewing Via Emails Module

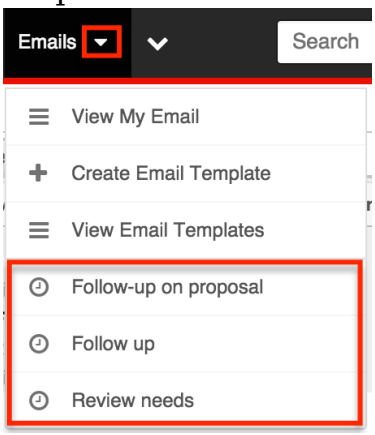
The Emails module displays all emails for the accounts currently configured. To access the Emails module, simply click the Emails module tab. While the Emails module shows key email fields, you can click on the email to view the email details below. You can also double click an email to open it up in a new tab within the Emails module view. For more information on viewing emails via the emails module, please refer to the Emails Module View section.

### Viewing Via Detail View

The Emails detail view displays thorough email information including all email fields followed by subpanels of the email's related records belonging to various modules. The detail view can be reached by clicking a email record's link from many subpanels and dashlets within the application. For more information on viewing emails via detail view, please refer to the Emails Detail View section.

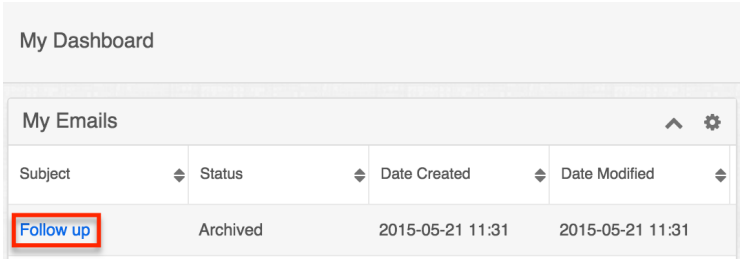
### Viewing Via Recently Viewed

As you work, Sugar will keep track of which emails and email templates you have recently viewed. Click the triangle on the Emails module tab to see a list of your most recently viewed records and click each name to open the email or email template in the detail view.



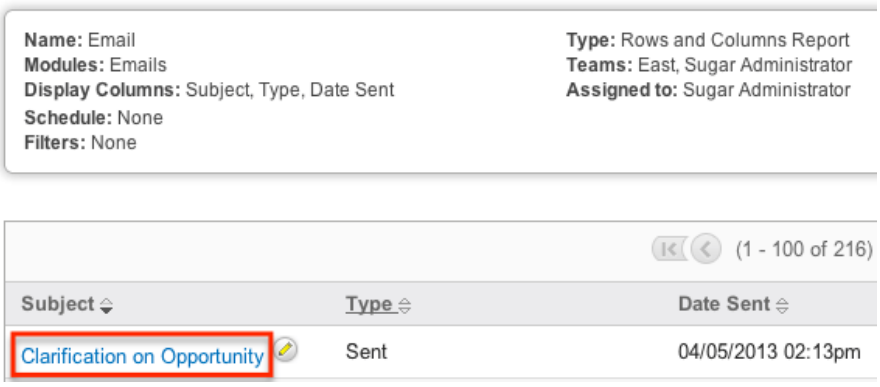

## Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets which allow users to get a quick view of various records, activities, reports, etc. You can view email information in email-based dashlets such as "My Email". Clicking an email's subject from any dashlet will open the email in detail view. For more information on using dashlets and viewing email records via dashlets, please refer to the Dashlets section of the Home documentation.




## Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding email and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the email record's detail view by clicking the email's subject in the report results. Please note that you can only directly access contact detail views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation.




# Emails Module View

The Emails module view displays any configured email accounts and emails within those accounts. You can view the basic details of each email within the field columns. Please note that for imported Emails you will only be able to see email records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

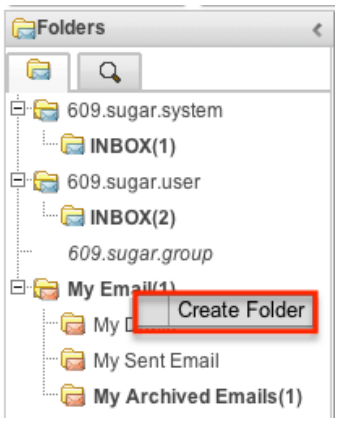
## Folders

The folders pane typically appears on the left side of the screen and contains a tree structure of any personal email accounts configured as well as any group inboxes being monitored. Sugar comes with some local folders created by default (i.e. My Email, My Drafts, My Sent Email, My Archived Emails), but users have the ability to create their own as well.

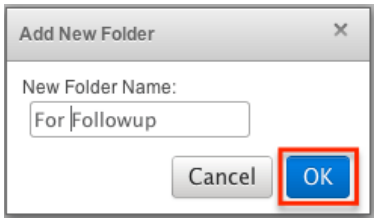
### Creating Folders

Local folders can be created to hold specific emails that have been imported into Sugar.
Use the following steps to create a new folder from within the Emails module view:

1. From within the Folders pane in the Email module, right click on the folder you wish to create a folder under and click "Create Folder".




2. Enter the name of the new folder and click "Ok".




3. The new folder will now show in the Folders pane under the selected folder.

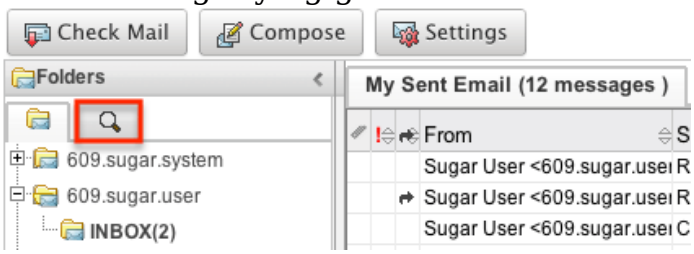
Managing Accounts and Folders

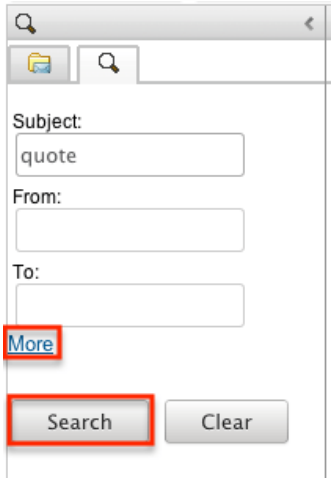
Sugar has some actions you can perform to manage any personal email accounts and folders directly from the folders pane. To access these actions simply right click on the folder or account you wish to perform actions on.
Note : Actions can not be performed on group email accounts. For more information on how to manage group email accounts, please refer to the Email documentation in the administration guide.
The following actions can be performed from the folders pane:

- Check Mail : Checks the personal email account or folder selected for any new email.
- Synchronize : Synchronizes the view of your personal email account or folder to the copy on the external server. Any changes made to email via other email clients will not show in Sugar until synchronized.
- Create Folder : Creates a new subfolder from the folder or account selected.
- Delete Folder : Deletes the folder currently selected.
- Rename Folder : Renames the folder or account currently selected.
- Empty Trash : Removes any deleted email from the account's trash directory.
- Clear cache files : Removes any cached email for a personal account.

## Search

Sugar allows users to search imported emails to help you locate emails easily and effectively. Once the search is performed, the relevant results will be displayed in the Search Results tab. Please note that Sugar automatically appends the wildcard character (%) to the beginning and end of your search phrase. This allows the system to retrieve all records that contain the keyword entered in the search.
Use the following steps to search imported email via the emails module:

1. Click the magnifying glass icon in the folders pane to view the search form.


2. Enter criteria to search on into one or more of the following fields:
    1. Subject : The subject of the email
    2. From : Who the email was sent from. Includes any name and email address in the From field.
    3. To : Who the email was sent to. Includes any name and email address in the To field.
    Note : Cc and Bcc is not included.
3. Click "Search" to execute the search or "Clear" to empty the search form.


4. Click "More" to be able to search on the additional fields:
    1. Date From : Select a date to search the "Date Sent" field on. Picking a date will show any email sent on or after the date selected.
    2. Date Until : Select a date to search the "Date Sent" field on. Picking a date will show any email sent before the date selected.
    3. Assigned To : Select a user to search on emails assigned to that user. Defaults to the currently logged in user.
    4. Has Attachment? : Select "Yes" to show only emails that have an attachment.
    5. Related To : Select a module and a record in that module to search any

emails related to that record.
Note : Only searches the Flex Relate field, not the additional related subpanels.

5. Click "Less" to hide these additional fields.




When you run a search, Sugar will return records matching all (as opposed to any) of the fields and options for which you have given a value. For example, if you select "Has Attachment?" as Yes and enter a subject, Sugar will only return emails with a matching subject that have an attachment. To see all emails to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see emails as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

## Emails List

The emails list displays all emails meeting the current search criteria or the selected account/folder and to which your user has access. You can view the basic details of each email within the field columns. Unread emails display in bold font where read emails are normal. Please note that you will only be able to see emails

as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

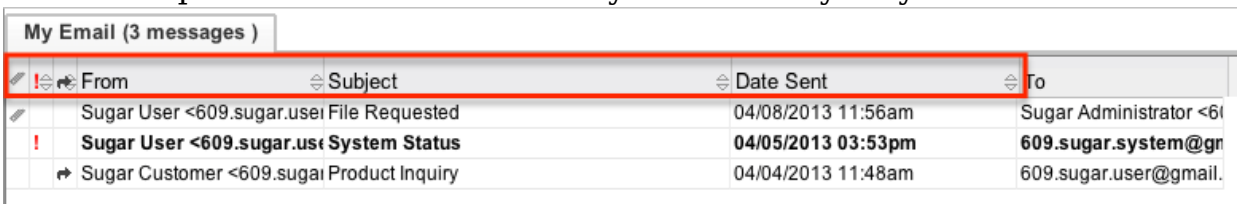
### Columns

The columns in the email list show specific information about the emails being shown. The below definitions are the meanings of each column in the emails list:

| Field | Description |
|---|---|
| Attachment | Shows a paperclip icon if the email has an attachment<br>Note : Only shows for emails imported into Sugar. |
| Flagged | Shows an exclamation point if an email is marked as flagged |
| Reply | Shows an arrow when you have replied to the specified email |
| From | The name and email address the email was sent from |
| Subject | The subject of the email |
| Date Sent | The date the email was sent |
| To | The name and email address(es) the email was sent to |

### Column Sorting

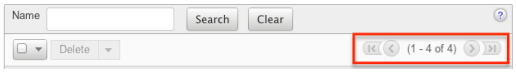
Emails list provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list may be sorted by only one column at a time.




### Pagination

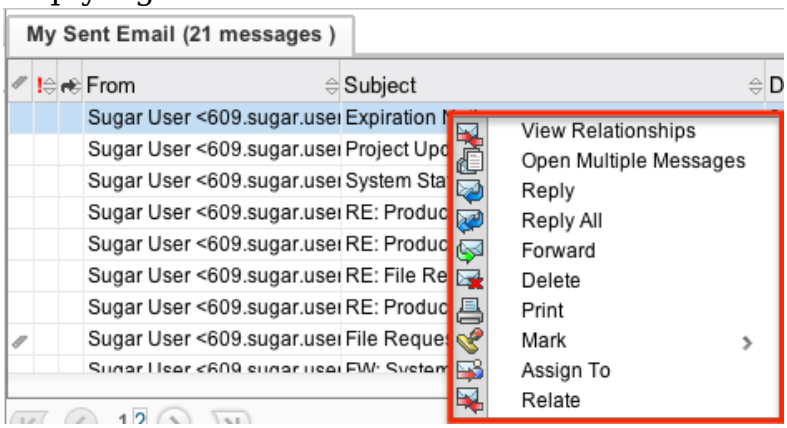
Emails list displays the current search results broken into pages that you can scroll

through rather than displaying potentially thousands of rows at once. Below the emails list you can see which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of your current results. Sugar displays 20 records per list view page.




## Actions Menu

Sugar can perform specific actions on emails within the emails module. Some of the actions depend on if the email is imported or not. To access the action menu, simply right click on an email from within the emails module.



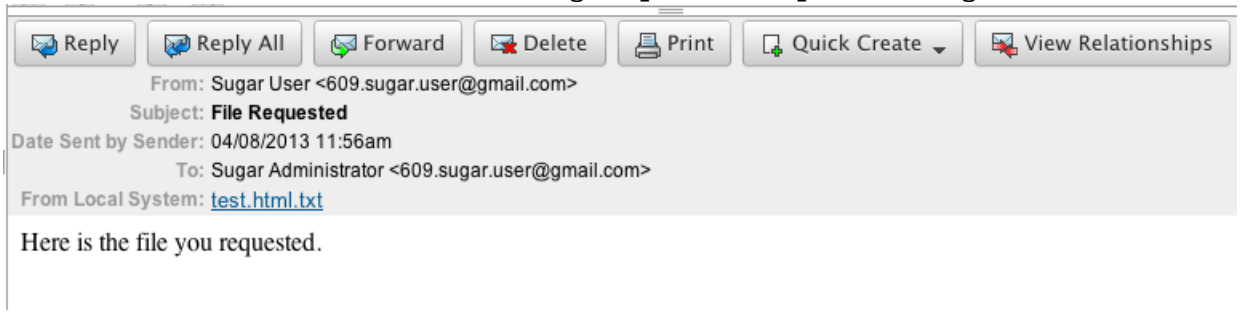

The following definitions are the available actions users can perform on emails:

| Menu Item | Description |
|---|---|
| View Relationships | Opens the detail view of the selected email<br>Note : Only available for imported emails |
| Open Multiple Messages | Opens the email in a new tab in the emails view giving you the ability to pen multiple emails |
| Import to Sugar | Triggers the import popup allowing you to set a team, assigned to user, and related to while importing the email to Sugar |
| Reply | Compose a new email directed to the sender as a reply to the selected email |
| Reply All | Compose a new email directed to all recipients as a reply to the selected |

| | |
|---|---|
| | email |
| Forward | Forward the selected email to additional recipients |
| Delete | Send the selected email to the trash folder |
| Print | Send the selected email to the printer |
| Mark | Set the selected email as unread, read, flagged, or unflagged |
| Assign To | Opens a popup window to change the assigned to or team fields |
| Relate | Opens a popup window to change the flex related to field |

## Email Panel

The email panel is typically shown in the bottom right corner of the Emails module, but can also be opened in a separate tab within the module. The email panel displays thorough email information including all fields of the email. The email panel can be reached by clicking an email in the emails list or by right clicking an email in the emails list and selecting "Open Multiple Messages".




The email panel comes with specific actions that can be performed on the specified email. The following actions can be performed from the email panel:

| Menu Item | Description |
|---|---|
| Reply | Compose a new email directed to the sender as a reply to the selected email |
| Reply All | Compose a new email directed to all recipients as a reply to the selected email |
| Forward | Forward the selected email to additional recipients |
| Delete | Send the selected email to the trash folder |

| | |
|---|---|
| Print | Send the selected email to the printer |
| View | Select "Display Headers" or "Display Raw Email" to view the respected detail in a popup window<br>Note : Only available on email not imported into Sugar. |
| Import to Sugar | Imports the email into Sugar in order to be related to records and viewable by others |
| Quick Create | Launches the quick create form for the selected module while importing the email, defaulting values into the name and description fields of the module, and automatically relating the email to the new record |
| View Relationships | Opens the detail view of the selected email<br>Note : Only available for imported emails |

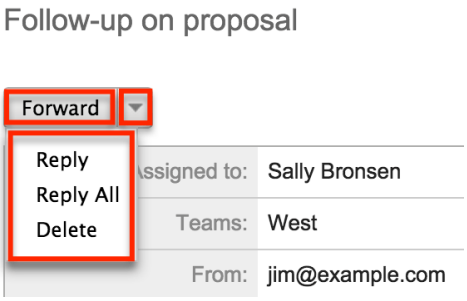
## Emails Detail View

The Emails detail view displays thorough email information including all email fields. You can also view an email's related records (Accounts, Contacts, Opportunities, etc.), which appear in subpanels beneath the email fields. The detail view can be reached by clicking an email's subject link from anywhere in the application outside of the emails module.

Please note that you will only be able to view an email record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

### Actions Menu

The Actions menu on the top left of each email's detail view allows you to perform various actions on the current record. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the System documentation in the Administration guide.




The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Forward | Forward the selected email to additional recipients |
| Reply | Compose a new email directed to the sender as a reply to the selected email |
| Reply All | Compose a new email directed to all recipients as a reply to the selected email |
| Delete | Send the selected email to the trash folder |

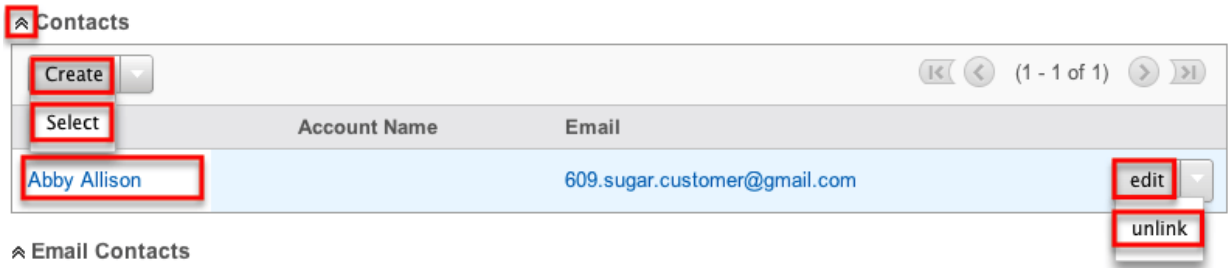
## Subpanels

Beneath an email record's fields are subpanels containing related records from various modules, attachments, and the email's activities.

### Related Record Subpanels

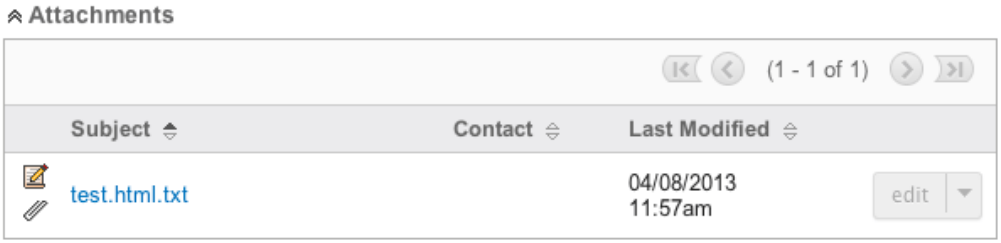
The most common type of subpanels displayed on a email's detail view contain the email's related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. For example, an email may be related to only one task via the flex relate but related to multiple opportunities. This means that the related task will be displayed amongst the email's fields while opportunities will be displayed in a subpanel beneath the fields.
Related record subpanels allow the following operations to be performed. Please note that administrators in Sugar can change the subpanel's Action menu to be displayed as separate buttons instead of a dropdown via Admin > System Settings. For more information, please refer to the System documentation in the Administration guide.

- To view the details of a related record, click the record's name in the subpanel to open it in detail view.
- To relate an existing record to the email, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the email, choose "Create" from the subpanel's Action menu, then complete the Quick Create form and click "Save".
- To edit a related record, choose "Edit" on the far right of the record's row.
- To delete the email's relationship to a record, choose "Unlink" from the dropdown on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.



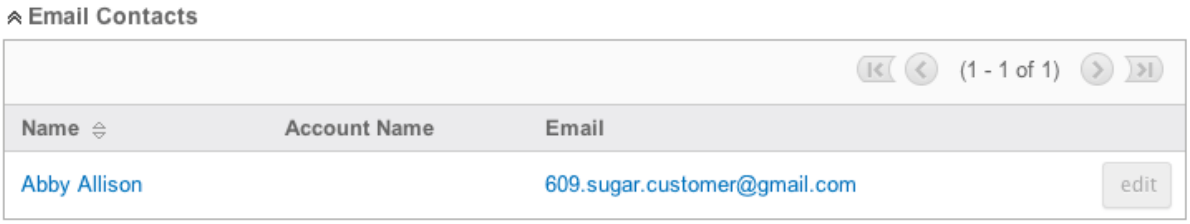

## Attachments Subpanel

The Attachments subpanel lists file attachments that are related to the email record. Attachments are stored in Sugar connected to Note records. The Note record and the attachment can be accessed directly from the Attachments subpanel.



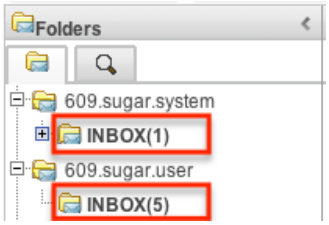

## Email Contacts Subpanel

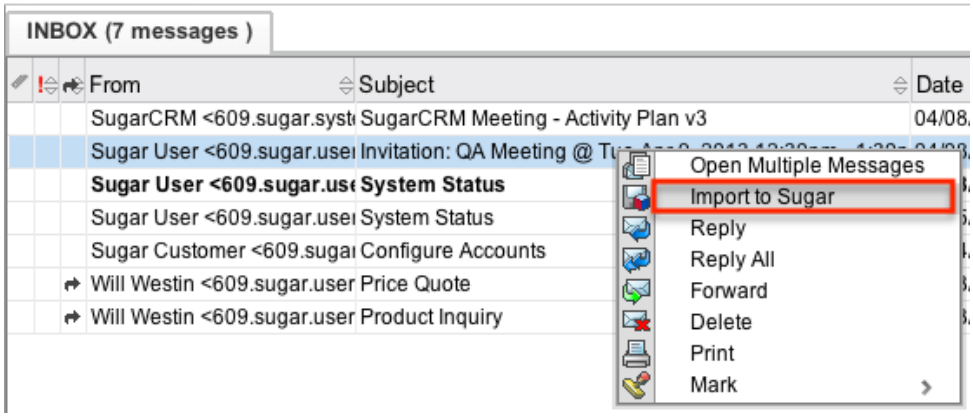
The Email Contacts subpanel will lookup any contact records in Sugar that match an email address listed in the To, Cc, Bcc, or From fields in the current email. The contact records do not need to be directly related to the email for the contacts to show in this subpanel as the connection is dynamically made via the email addresses.



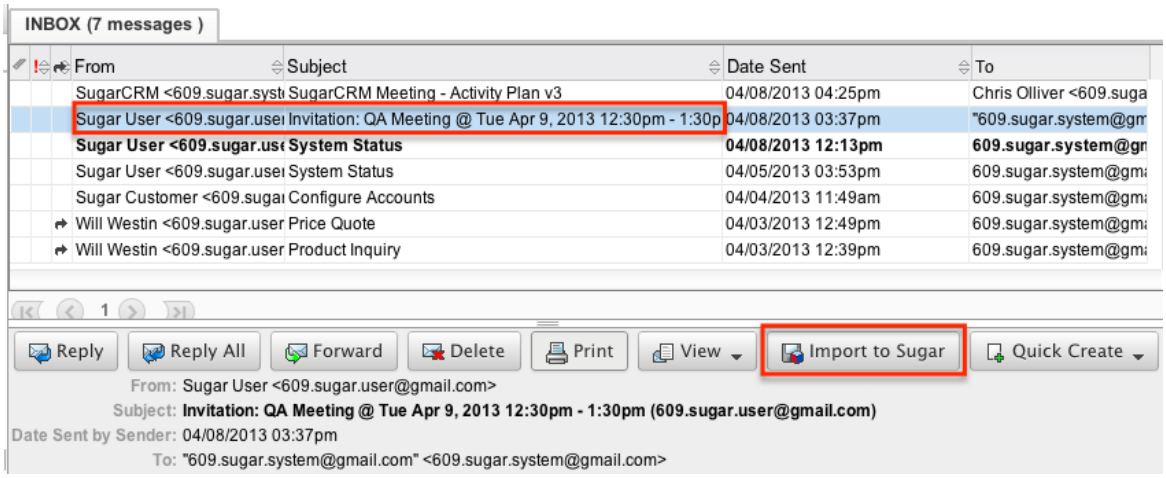

# Importing Emails

Importing emails from external mail accounts enables you to manage them within Sugar. You can assign imported emails to other users 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 on your homepage. For more information on using dashlets and viewing email records via dashlets, please refer to the Commonly Used Dashlets section of the Home documentation.
Use the following steps to import an email from an external account to Sugar:

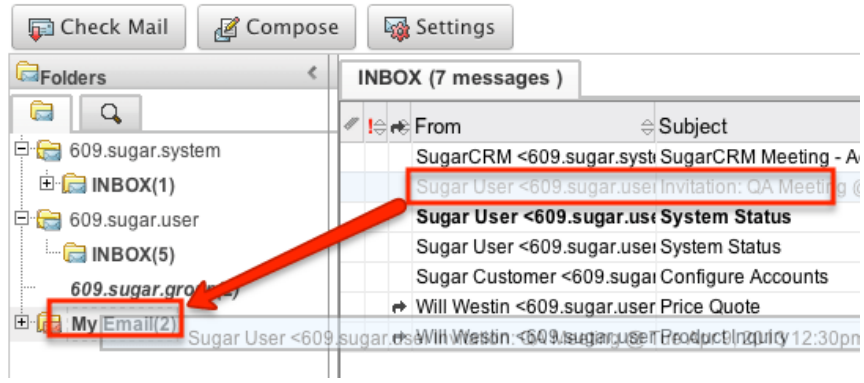
1. From the Folders pane, select a monitored folder from an external account.


2. Right click on an email you wish to import and select "Import to Sugar".


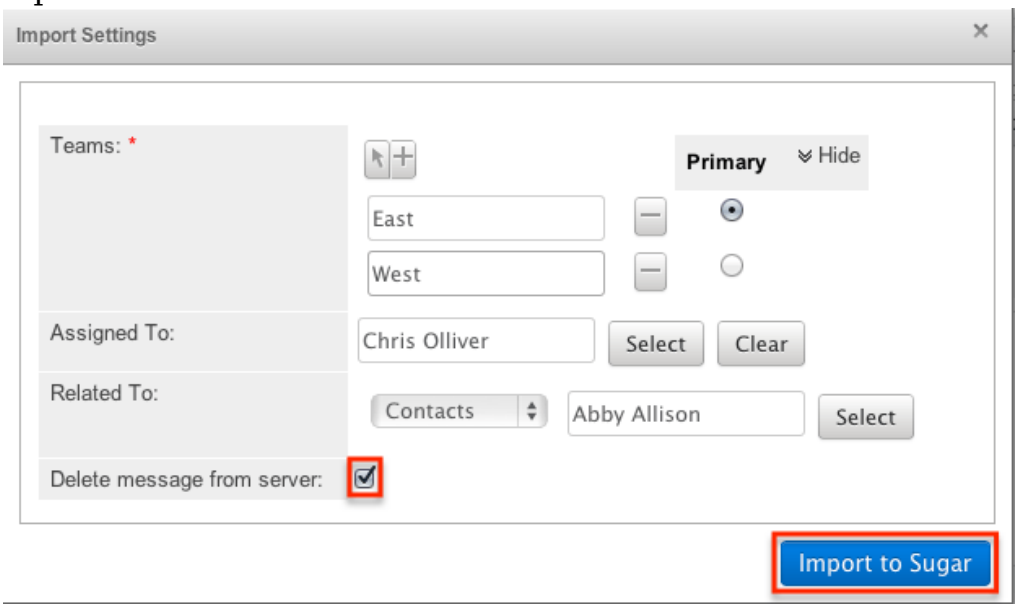

Alternatively, select the email and in the email pane, select "Import to Sugar"




A Third option is to drag and drop the email from the Emails list to the "My Emails" section of the folder pane.



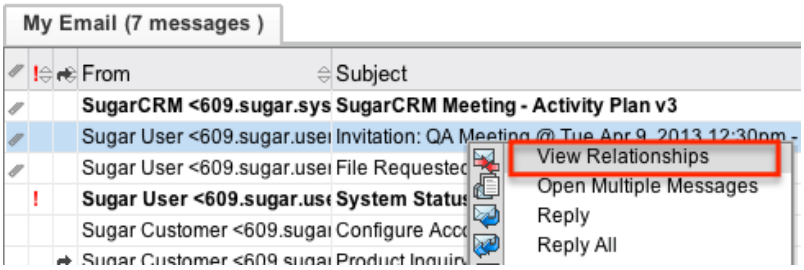

3. Update the necessary fields, then click "Import to Sugar" to complete the import.



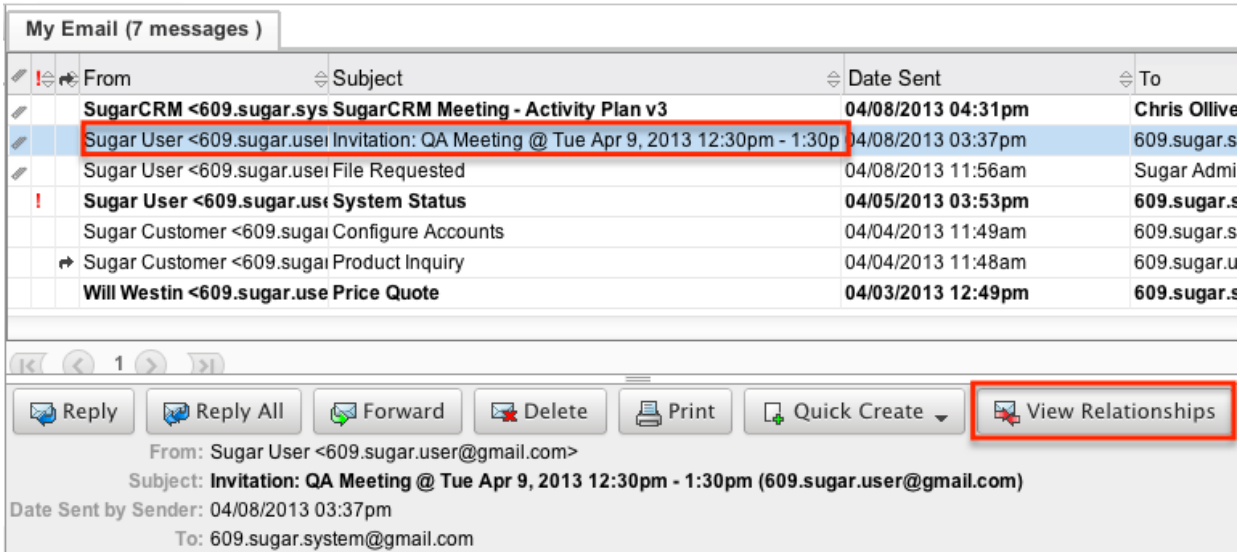

Note : The Delete message from server option will delete the email from the monitored folder in the external account.

## Viewing Email Relationships

From the emails list you can select an email to view the relationships that email has to other records within Sugar. Select "View Relationships" by right clicking on an email:



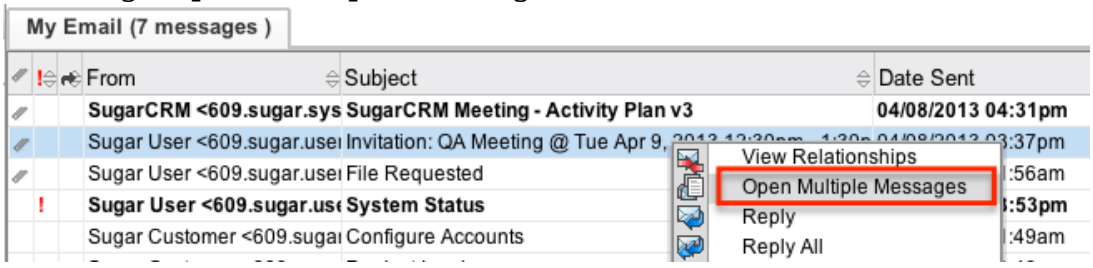

or by selecting an email and clicking the button in the email pane:



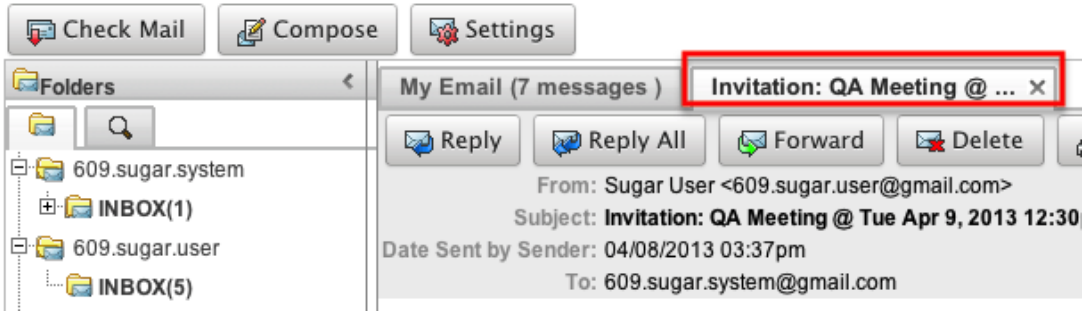

This will show the detail view of the selected email with subpanels to multiple modules below the email content. For more information on the detail view, please refer to the Emails Detail View section in this documentation.

## Opening Multiple Messages

In the Emails module, users can view emails in the email pane by selecting an email. Another way to view emails would be to open the email into a new tab within the emails module. You can do this by right clicking on an email and selecting "Open Multiple Messages".

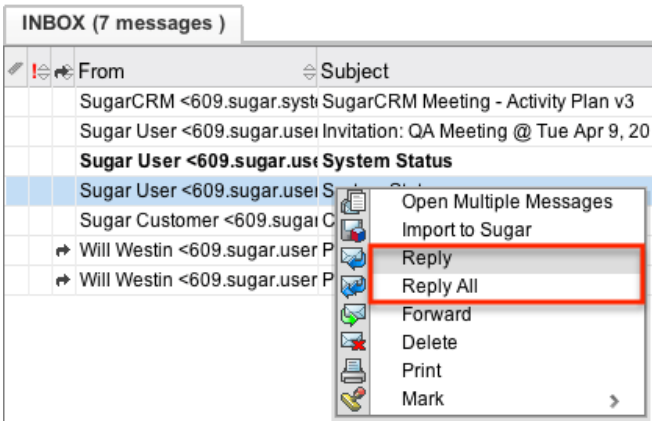



This will open the selected email into a new tab within the emails module.

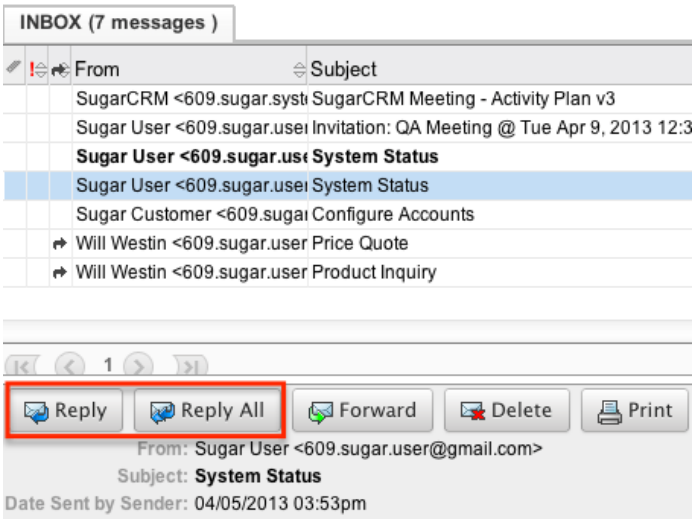



# Replying to Emails

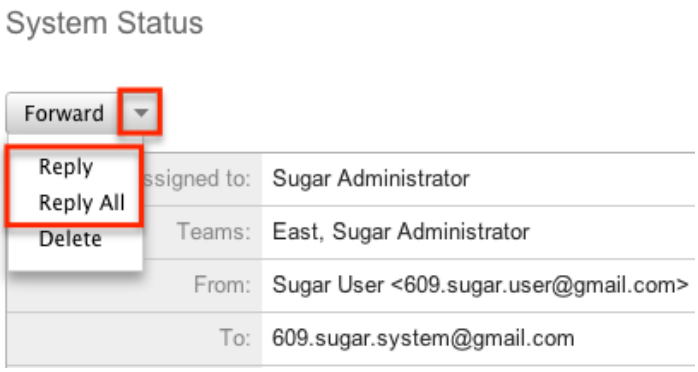
Sugar includes the standard "Reply" and "Reply All" functions that are included in most email clients. When replying to an email, Sugar composes a new email while populating the body, subject, and recipients of the email. The subject line from the email you are replying to comes over to the new email, but is preceded with "RE: ". The body from the email you are replying to is also pulled into the new email, but is indented and has a line above the contents to separate the original email from the content you are adding to the reply.
Select "Reply" to reply to only the sender of the selected email or select "Reply All" to reply to the sender and any other recipient on the original email. You can access "Reply" and "Reply All" by right clicking on an email:




Or from the email pane:



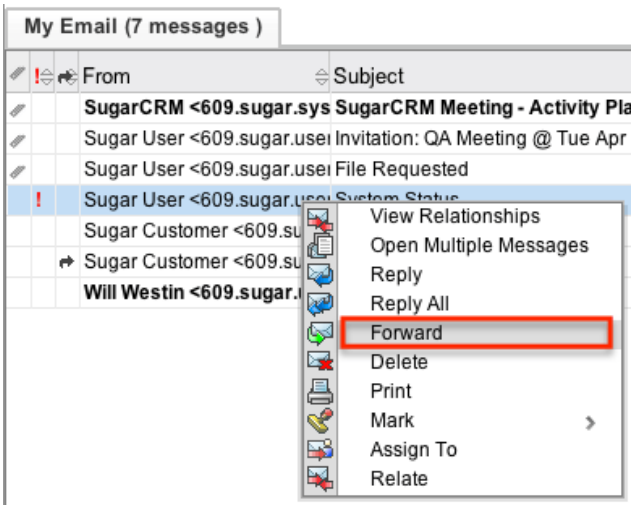

Or from the email's detail view:



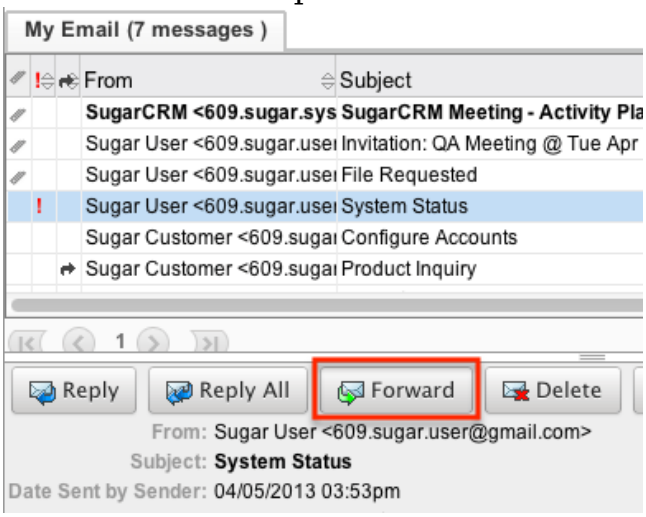

Enter your reply above the divider line in the compose email screen. For more information on how to compose an email, please refer to the Composing Emails section.

## Forwarding Emails

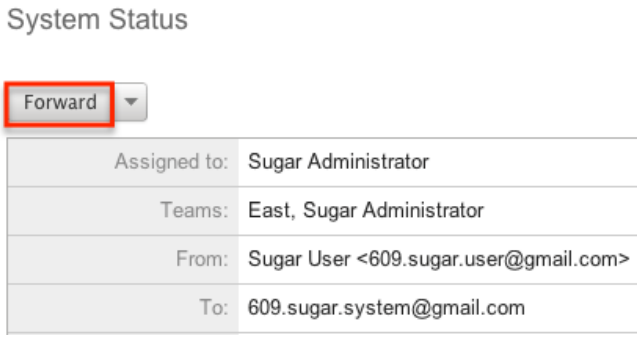
Sugar includes the standard "Forward" function that is included in most email clients. When forwarding an email, Sugar composes a new email while populating the body, subject, and recipients of the email. The subject line from the email you are forwarding comes over to the new email, but is preceded with "FW: ". The body from the email you are replying to is also pulled into the new email, but is indented and has a line above the contents to separate the original email from any content you are adding to the forward.
You can access "Forward" by right clicking on an email:




Or from the email pane:




Or from the email's detail view:

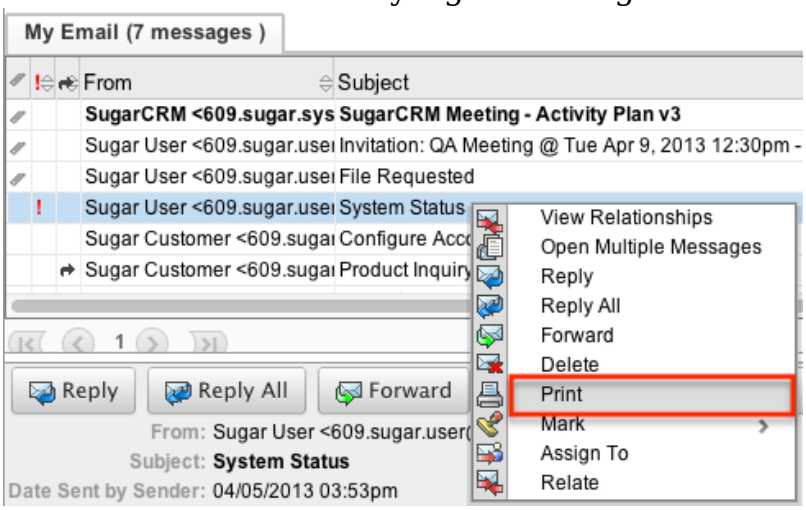



Enter any additional content above the divider line in the compose email screen. For more information on how to compose an email, please refer to the Composing Emails section.

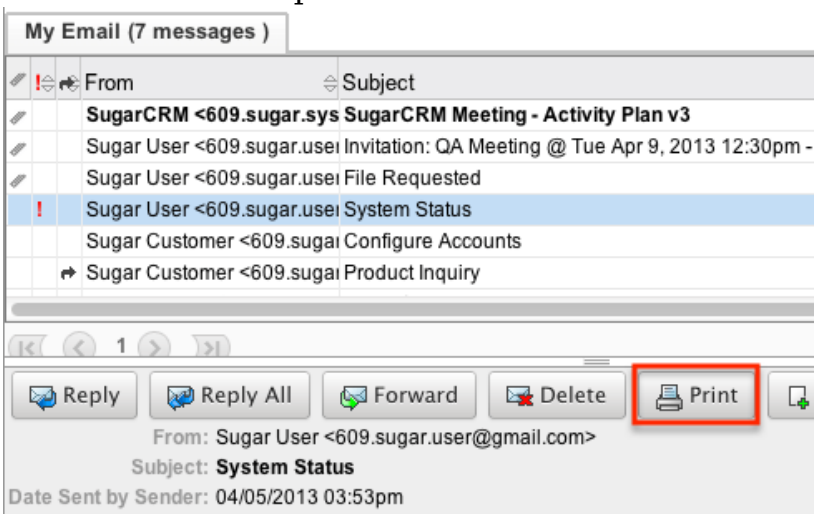
## Printing Emails

Sugar comes with the ability to print email. When printing, Sugar will open the email in a popup window and displays the email in a printer friendly version.

You can access "Print" by right clicking on an email:

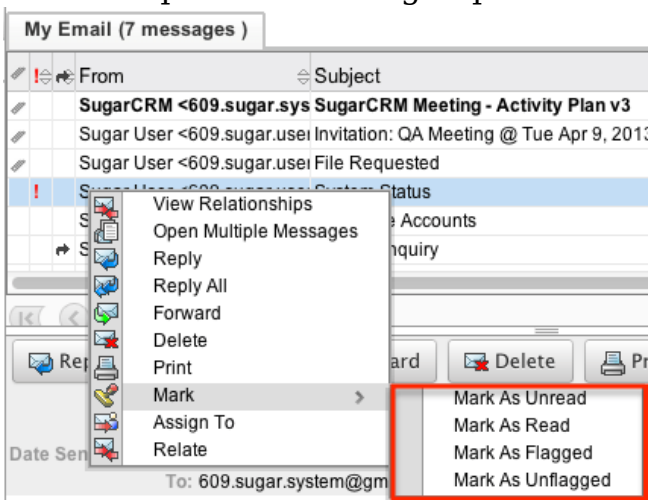



Or from the email pane:




## Marking Emails

Sugar allows users to mark emails as read, unread, flagged, and unflagged. This can be helpful for locating important emails from within the emails module.

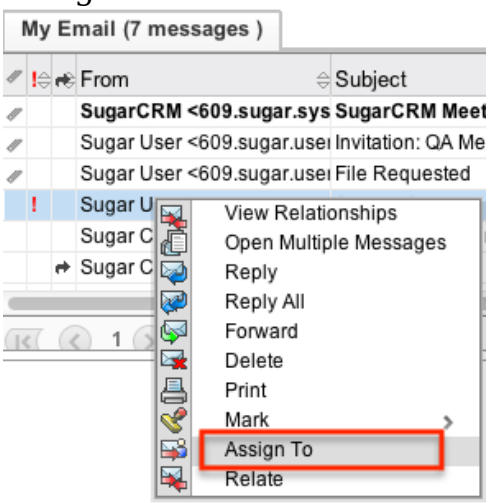


The options in the Mark menu allow you to perform the following operations:

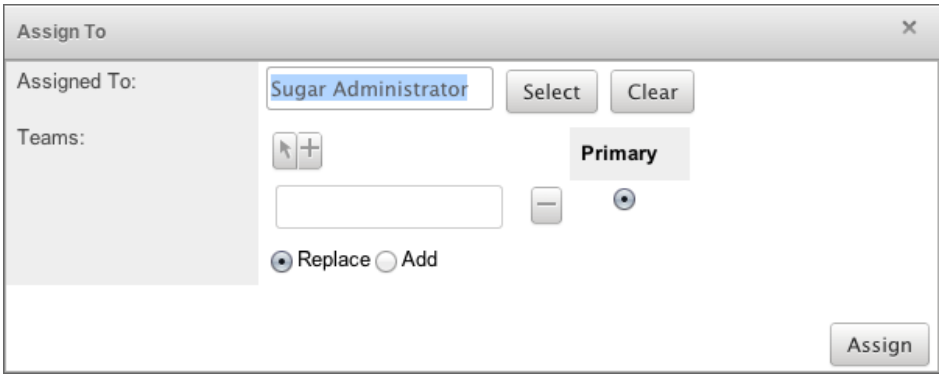
| Menu Item | Description |
|---|---|
| Marking as Unread | Sets an email to be unread making it show in bold. |
| Marking as Read | Sets an email to be read making it show as normal text. |
| Marking as Flagged | Sets an email as flagged placing an exclamation mark new to the email. |
| Marking as Unflagged | Sets an email as unflagged, removing the exclamation mark from a flagged email. |

## Assigning Emails

When importing an email into Sugar you can set the assigned to and team fields to a Sugar user and a Sugar team. If you wish to change these fields for an already imported email, you can right click on the email from the emails list and select "Assigned To".



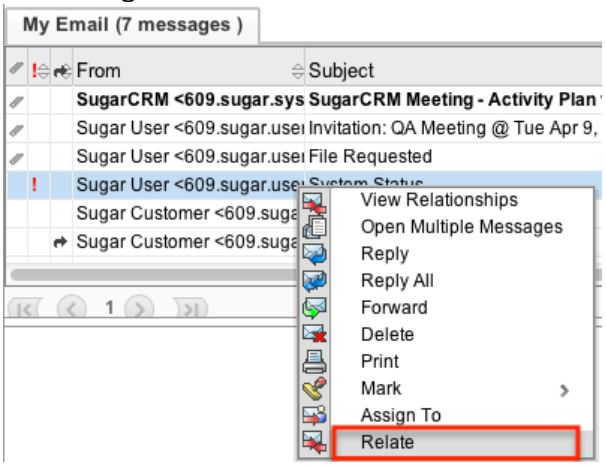

The Assign To popup window opens defaulting in the current assigned user for the selected email.



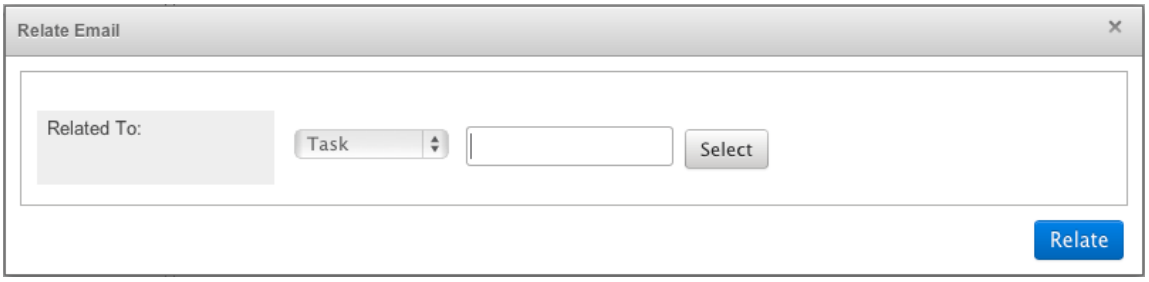
Change the Assigned To and Teams fields to the desired records.
Note: For the Teams field, use "Replace" to remove existing team assignments before adding those specified here. Use "Add" to add the teams specified here to any existing team assignments.

## Relating Emails

When importing an email into Sugar, you can assign a single module and record to be related to this email via the flex relate field. For already imported email, you can change the related to field by right clicking on the email in the emails list and selecting "Relate".



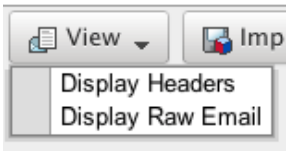

The Relate Email popup window opens defaulting the current assigned module for the selected email.




Change the Module from the dropdown and select the desired record for that module.
Note : This field controls which module and record this email shows up in the history subpanel for.

## Viewing Email Details

Users can view some additional backend detail about email from external accounts by clicking "View" from the email pane.




Note : The View option is only available on emails that are not imported into Sugar.

### Displaying Headers

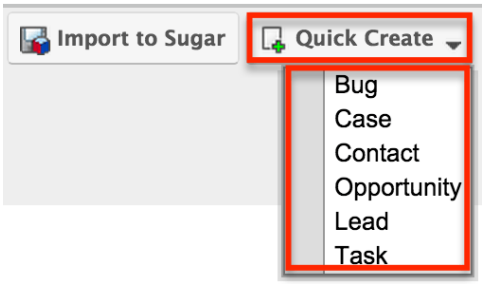
From the View option, select "Display Headers" to view the header details for an email. The header details include information such as the email servers used and the content-type of the email.

### Displaying Raw Email

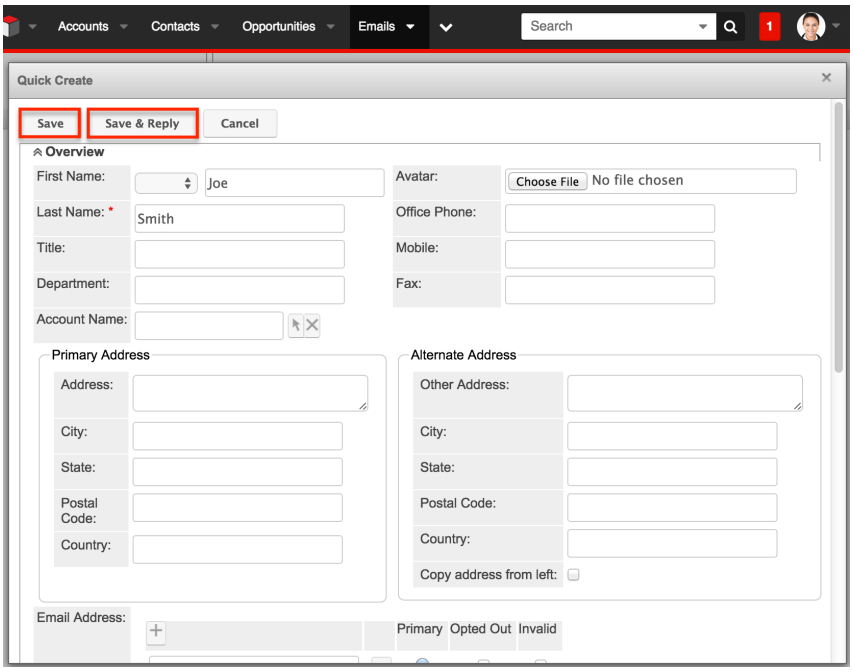
From the View option, select "Display Raw Email" to view the raw contents of an email. The raw contents show the html content of the body as well as the email header information.

## Creating Records From Emails

Users in Sugar can launch a quick create form for many modules directly from an external email or from an imported email. From the emails pane, click "Quick Create" and select the desired module record to create from the email.




The quick create form for the selected module opens in a popup window. The name and description fields for the selected module are populated by default with the subject and body of the email. All required fields are marked with a red asterisk and must be completed prior to saving. Once the necessary information is entered, click "Save" or "Save & Reply".




The email selected will then be imported, if not already, and will be related to the new record. If a relationship does not exist between emails and the selected module (i.e. Tasks) then the relationship will be made via the flex relate field.

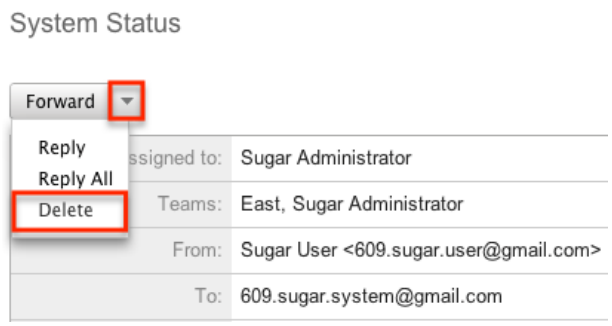
# Deleting Emails

If a email is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Emails detail view or Emails Module. Deleting via the detail view allows you to delete a single record while the module view allows for mass deleting multiple records at once. Deleting email records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.
Please note that your ability to delete emails may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

## Deleting Via Detail View

Use the following steps to delete an email record via the detail view:

1. Navigate to an email record's detail view.
2. Select "Delete" from the Actions menu.

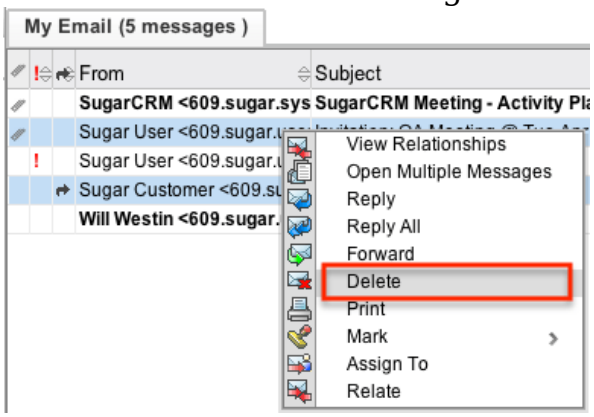



3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

## Mass Deleting Via Emails Module

Use the following steps to delete one or more email records via the emails module:

1. Navigate to the emails module by clicking the Emails module tab.
2. Select an account or folder, or perform a search from the Folders pane.
3. Select the desired email records individually or hold ctrl (command on Mac) to select multiple.
4. Choose "Delete" from the right click menu.




5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Due to PHP memory limitations on the server, there may be occasions when the application times out while deleting a large number of email records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

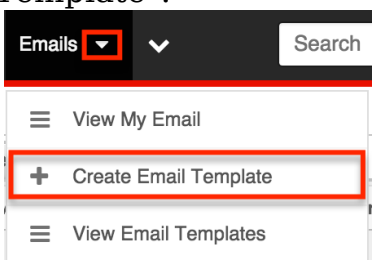
# Email Templates

Email templates are used in Sugar as simple form letters, automated email responses, or just commonly used emails to save time and prevent typos. When a user receives an email regarding a case or bug, then can send back a standard response email using an email template. Email templates are also used for

campaigns within Sugar as well as workflows. For more information on how to create and modify email templates for campaigns, please refer to the Creating Email Templates section in the Campaigns documentation. For more information on how to create and modify email templates for workflows, please refer to the Creating Alert Templates section in the Workflow Management documentation. Email templates can contain text, HTML content, and images. Users can embed .jpg or .png image files from their local computers or from the Sugar database into the template. Image files such as .gif, .bmp, .png, .jpg, .jpeg can be included as attachments, but cannot be embedded. Placeholder variables can be added to the template for field values like the contact's name so you can personalize the email to your recipients.

## Creating Email Templates

Use the following steps to create an email template via the Emails module:

1. Click the triangle on the Emails module tab and select "Create Email Template".


2. Complete the fields on the screen as follows. Any required fields are marked with a red asterisk and must be completed:
Name : Enter an internal name for the email template.
Type : Select either "Campaign" or "Email".
Note : You can create an email template for a campaign through this interface; although, you cannot insert tracker URL links to the template. For more information on how to create an email template for campaigns, please refer to the Campaigns documentation in the Application guide.
Teams : Select the Sugar team(s) assigned to the email template.
Assigned To : The Sugar user assigned to the email template.
Description : Enter a description or other information about the template.
Subject : Enter the subject of the emails that will be sent.
Body : Enter the body of the emails that will be sent.
Attachments : Click "Choose File" to navigate to a location on your computer to attach a file. Click "Sugar Document" to attach a file from the sugar database.
Note : Documents that link to an external account (i.e. Google Docs, IBM SmartCloud, etc.) cannot be used as attachments in emails composed through the Sugar Email client.

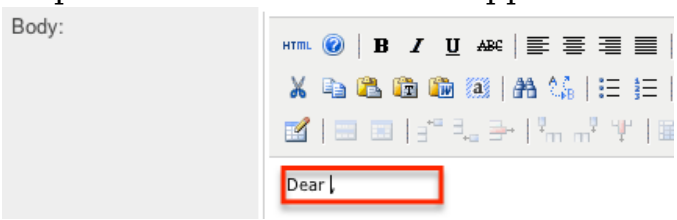
3. Using the TinyMCE functions, add simple formatting to your email's content. For more advanced customization you can click the HTML button in the top left to access and edit the generated HTML code.
   For more information on using TinyMCE, please refer to the TinyMCE section in the User Interface documentation in the Application guide.
   Note: If images or advanced CSS are required in your email template, it is highly recommended to host the images or CSS file on a publicly available hosting service and link to it in the email template.
4. Click "Save" to preserve your changes to the email template.



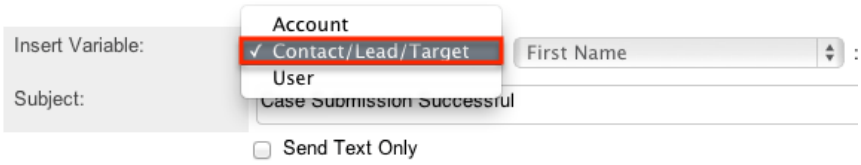

Inserting Variables

When constructing the subject and body of your email, Sugar allows you to insert variables, or placeholders, into the template that will be populated with the record's information for that variable. Use the following steps to insert a variable for the recipient's first name into the template:

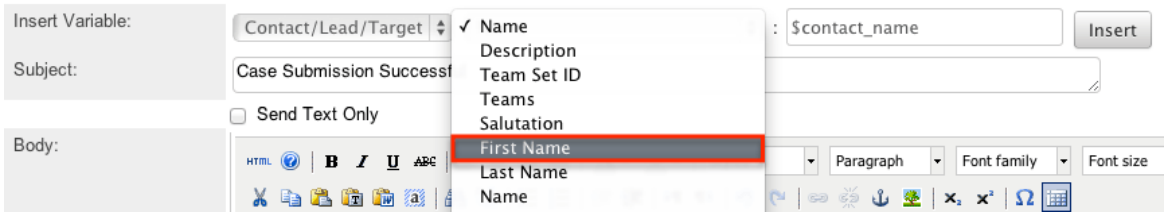
1. Click to place your cursor on the location in the subject or body where the recipient's first name should appear.



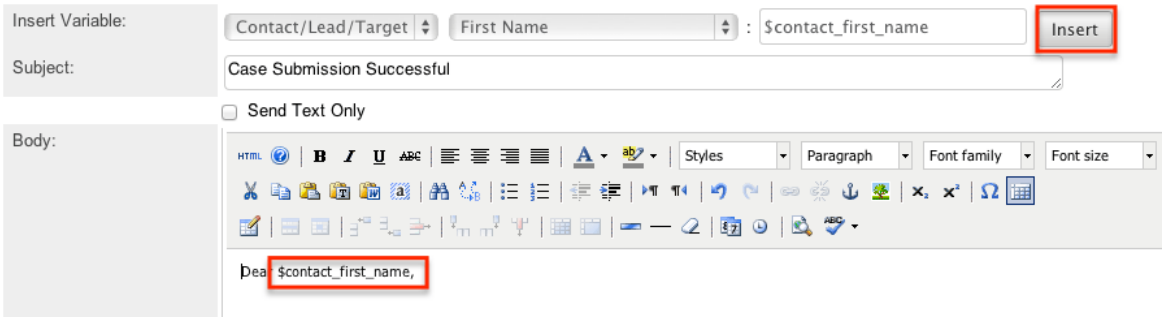

2. In the Insert Variable row, select the module you would like to insert a variable from.




3. Set the second dropdown to the desired field from the modules selected in the first dropdown. For our example, select "First Name".




4. Click "Insert" to insert the generated variable name to your subject or body at your cursor's location.

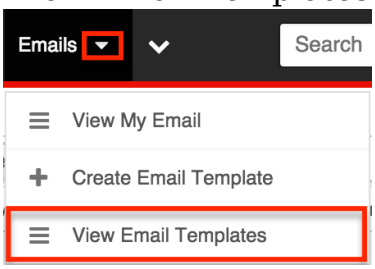



If there are no images, links, or formatting in your email, then sending it as text only may be a good option. Click the Send Text Only checkbox to remove the HTML formatting options. Alternatively you can click "Edit Plain Text" at the bottom of the page to have the plain text option send differently than the HTML text.

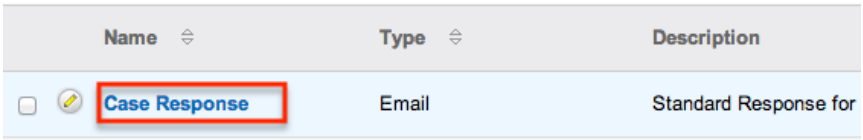
## Viewing Email Templates

There are various options available for viewing email templates in Sugar including via list view, detail view, and Emails Recently Viewed menu. Please note that you will only be able to see email templates as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

The list view displays all email templates meeting the current search criteria. To access the list view, simply click the triangle on the Emails module tab and select "View Email Templates".




While list view shows key fields, you can click the email template's name to open the record in detail view.




The detail view displays thorough information including all email template fields. Select "Edit" to edit the email template.




## Sugar Email Archiving

Sugar Email Archiving is an automatic email importing service that allows users to import emails into Sugar by sending them from any mail client or service to a Sugar-provided email address. Each Sugar instance has its own unique Sugar Email Archiving mailbox. To import emails, a user sends or forwards emails to the unique Sugar Email Archiving email address using the To, Cc, or Bcc fields. The Sugar Email Archiving service will import the email into the Sugar instance. The service imports the email, along with any attachments, images, and calendar events, then creates records within the application that are associated with existing records by matching email addresses in the To and Cc fields. In addition, the Sugar Email Archiving service will also scan the body of the email to archive the email to records with a matching email address. Please note that in order for the email address to be recognized properly for email archiving, it must be displayed as "To: (End Client Name (optional)) " (e.g. To: John Smith john@example.com>) in the body of the email. The archived email will appear in the History dashlet for any matching records in Sugar. The imported emails will also be related to a specified case number by including the case macro and the case number (i.e. [CASE:{number}]) in the subject of the email.

Note: Email Archiving cannot read email addresses from the Bcc field the same as when you receive an email.
Emails can be sent to the Sugar Email Archiving address and viewed in the History dashlets in Record View pages for the following modules:

- Accounts

- Contacts
- Leads
- Opportunities
- Cases

Emails with .ics meeting attachments sent to SNIP are parsed by Sugar. The Meeting record is created and for every email that is invited to the meeting, if User, Contact or Lead record exists matching this email, this record is added to the list of invitees for the meeting.

Email Archiving can be configured via Admin > Email Archiving. For more information on how to setup and configure Email Archiving, please refer to the Email documentation in the administration guide.

Note: If the email client is configured to use non-English From, To, and Cc fields, forwarding emails inline to Email Archiving may not work. Send the email to Email Archiving directly using the Cc and Bcc fields or forward the email as an attachment. For large volume of non-English emails that need to be archived using Email Archiving, set a rule in your email application to copy the emails to the SNIP email address.

Last Modified: 01/04/2016 02:20pm

# Tasks

## Overview

Sugar's Tasks module consists of flexible actions, to-do items, or other types of activity which requires completion. Task records can be related to one record in most modules via the flex relate field and can also be related to a single Contact. There are various ways you can create tasks in Sugar such as via the Tasks module, duplication, importing tasks, etc. Once the task record is created, you can view and edit information pertaining to the task via the Tasks record view. Depending on the details on the task, you may also be able to view and edit the task information via the Calendar module. Each task record may then relate to other Sugar records such as accounts, contacts, opportunities, and many others. This documentation will cover how to use the Tasks module as well as the various actions and options available from within the module.

## Task Fields

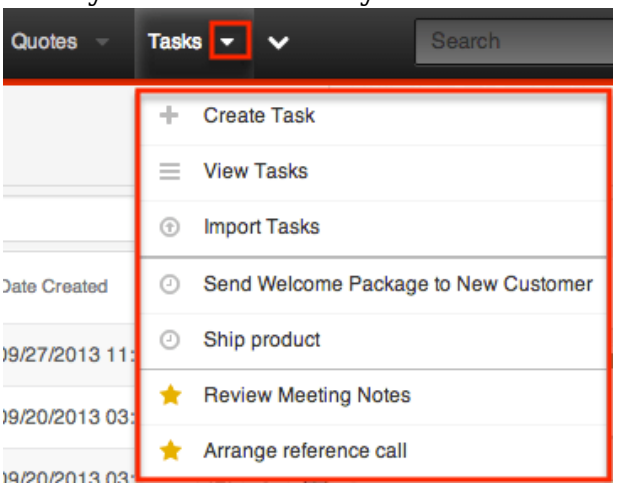
The Tasks module contains a number of stock fields which come out-of-the-box

with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

| Field | Description |
|---|---|
| Assigned To | The Sugar user assigned to the task |
| Contact Name | The contact record the task is related to<br><br>Note: The task will appear in either the contact's Active Tasks or Inactive Tasks dashlet in the intelligence pane. |
| Date Created | The date the task record was created |
| Date Modified | The date the task record was last modified |
| Description | A description or other information about the task |
| Due Date | The date and time the task is due to be completed<br><br>Note: The task will appear on the assigned user's Calendar per the date and time of the task. |
| Priority | The priority or importance of the task (e.g. High, Medium, Low) |
| Related to | The module and record that is related to this task<br><br>Note: The task will appear in either the Active Tasks or Inactive Tasks dashlet of the selected module record's intelligence pane or the Activities subpanel or History subpanel (BWC modules only). |
| Start Date | The date and time the task is started |
| Status | The current status of the task (e.g. Not Started, In Progress, Completed, etc.) |
| Subject | The subject or brief summary of the task |
| Teams | The Sugar team(s) assigned to the task record |

# Tasks Module Tab

The Tasks module tab is typically found by clicking the arrow to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Tasks" to access the list view. Once the Tasks tab displays on the navigation bar, you can click the triangle within the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of tasks you last viewed in the module. The Favorites menu displays the list of tasks you most recently marked as favorites in the module.




The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|---|---|
| Create Tasks | Opens the record view layout to create a new task |
| View Tasks | Opens the list view layout to search and display tasks |
| Import Tasks | Opens the import wizard to create or update tasks using external data |

If you do not see the Tasks module tab in Sugar, please check the following:

- The Tasks module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Tasks module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Tasks module for your entire Sugar

instance. Reach out to your Sugar administrator to have the Tasks module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

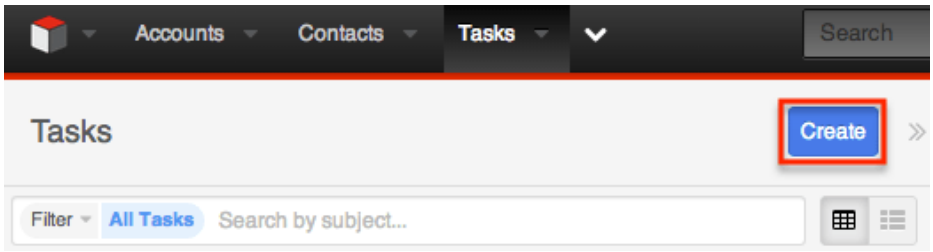
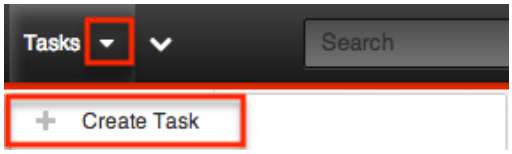
## Creating Tasks

There are various methods for creating tasks in Sugar including via the Tasks module, quick create, duplication, importing, and Tasks dashlet. The same record view layout opens when creating the task directly from the Tasks menu as well as via the Quick Create menu and includes all of the relevant fields for your organization. Please note that administrators can configure the Record View layout via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

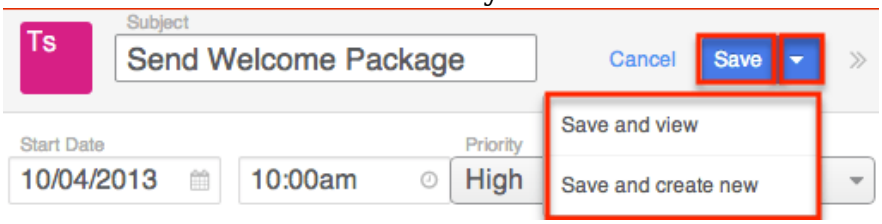
### Creating Via Tasks Module

One of the most common methods of task creation is via the Tasks module using the Create Task option in the module tab or the Create button on the list view. This opens the record view layout which allows you to enter all of the relevant information for the task.

Use the following steps to create a task via the Tasks module:

1. Click the triangle in the Tasks module tab to open the actions menu and select "Create Task". You can also click the Create button on the upper right of the Tasks list view.
   From Tasks module tab:
   
   
   From Tasks list view:
   
   
2. Enter appropriate values for the fields in the record view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.

3. Once the necessary information is entered, click "Save".
    - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.

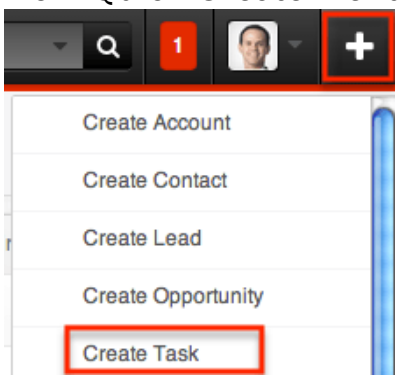



## Creating Via Quick Create

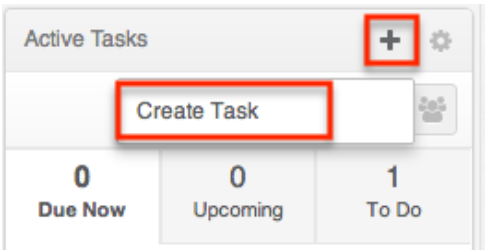
The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of any Sugar page to access the menu. You can also quick create a task from any Tasks dashlet on a related modules intelligence pane.

Use the following steps to create a task via Quick Create:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Task" or click the Plus button on any Tasks subpanel on a related module's record view.
   From Quick Create menu:

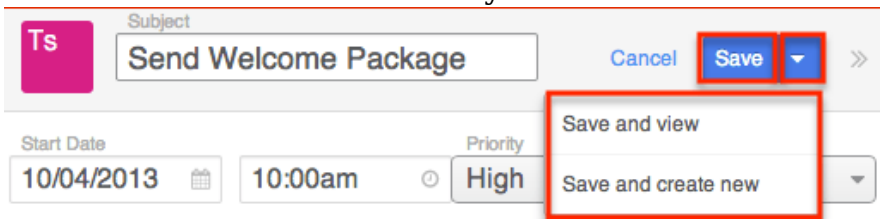



   From Tasks dashlet:




2. Enter appropriate values in the fields in the record view form. All required fields will indicate "Required" in the field and must be completed prior to

saving.
    - Note: The record you are currently creating the task from will automatically related to the task.
3. Once the necessary information is entered, click "Save".
    - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.

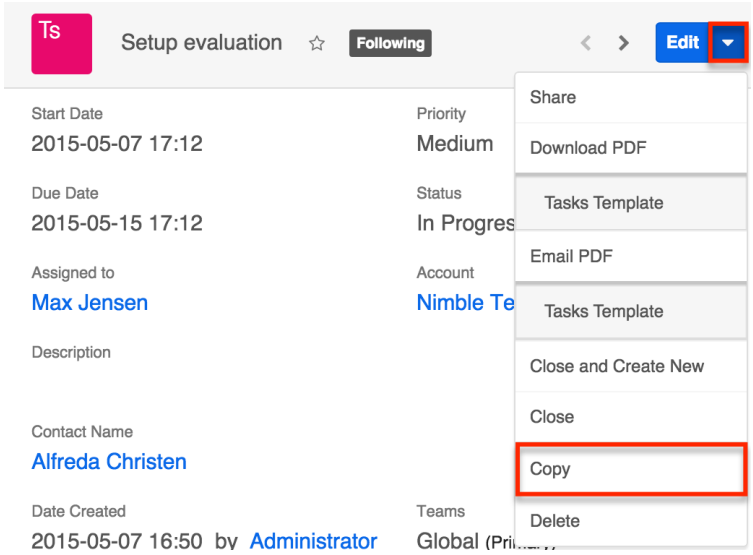



## Creating Via Duplication

You can also create a new task by duplicating an existing task record. The Copy option is useful if the task you are creating has similar information to an existing task. Please note that existing subpanel relationships for the original task record will not carry over to the duplicated task record.

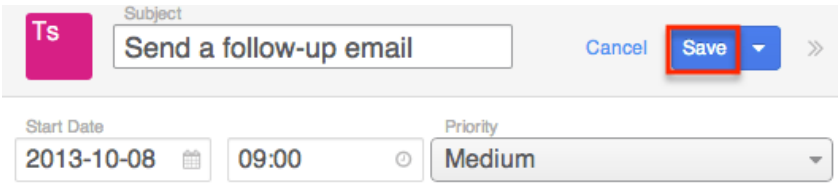
Use the following steps to create a task by duplicating an existing record:

1. Navigate to a task's record view.
2. Click the Actions menu and select "Copy".



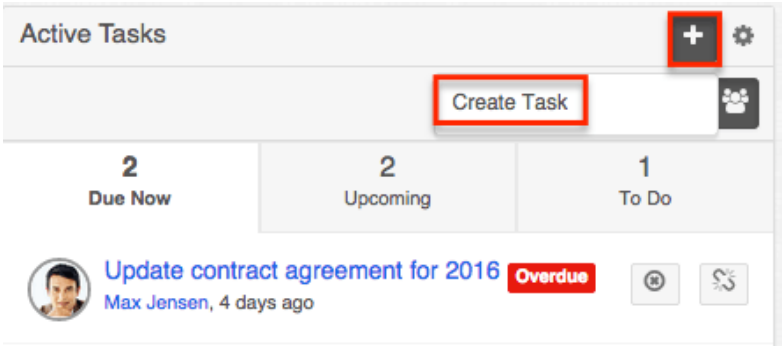

3. The displayed record view is pre-populated with the original task's values. Update the necessary fields, then click "Save".
    - Please note that you can also click the Actions Menu to the right of the

Save button to select the "Save and view" or "Save and create new" options. Save and view will display the record's details after the save is complete. The Save and create new option saves the current record and opens a new, blank record view in edit mode where the user can create another record.



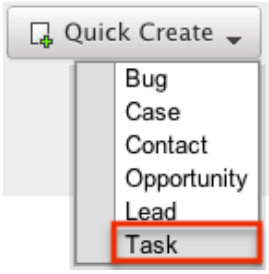

## Creating Via Dashlet

The Active Tasks dashlet displays all open tasks and is available to add to a user's Home page as well as a module's (e.g. Accounts, Contacts, etc.) intelligence pane. Users can easily create new tasks via this dashlet by clicking the Plus icon on the upper right of the dashlet and selecting "Create Task". Complete the Tasks record view layout and save to create the new task. For more information regarding the Active Tasks dashlet, please refer to the Intelligence Pane documentation.




## Creating Via Emails

The Emails module enables users to create new task records from external and imported emails using the Quick Create option. Simply click the Quick Create button above the selected email header then select "Task".




A pop-up window will open with the quick create form where you can enter relevant values for the new task. The name and description fields are populated by

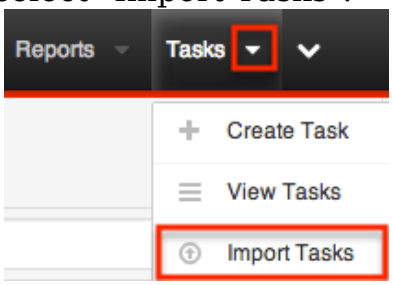
default based on the emails header, body, etc. All required fields are marked with a red asterisk and must be completed prior to saving. Once the necessary information is entered, click "Save". For more information on how to create, send, and manage emails, please refer to the Emails documentation.

Please note that the selected email will be imported, if not already, and automatically related to the new task. The email record will appear within the History dashlet of the Tasks record view.

### Importing Tasks

The import function allows you to push multiple task records into Sugar using a comma (or other character) delimited file instead of creating them one-by-one. For more information on importing, please refer to the Import documentation.

Use the following steps to import tasks via the Import Tasks option:

1. Click the triangle to access the Actions menu in the Tasks module tab and select "Import Tasks".


2. In Step 1, select the import file and choose "Create new records only". Click "Next".
3. In Step 2, confirm the import file properties. Click "Next".
4. In Step 3, confirm the field mappings for the import. Click "Next".
5. In Step 5, view the import results.
    - The Created Records tab will show all of the new task records.
    - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
    - The Errors tab will show records that were not imported due to errors detected during import.

## Viewing Tasks

There are various options available for viewing task records in Sugar including via Tasks list view, Tasks record view, Tasks Recently Viewed menu, dashlets, reports, and calendar. Please note that you will only be able to see task records as allowed

by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

## Viewing Via List View

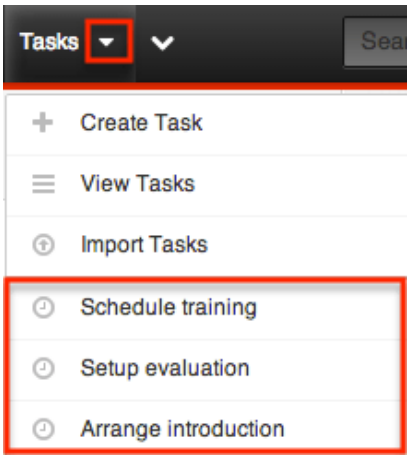
The Tasks list view displays all task records meeting the current search criteria. Users can also access the activity stream to view posts specific to the task record. For more information on the Record View's Activity Stream, please refer to the Activity Stream section of this documentation. The Intelligence pane can also be viewed to the right of the record's details and allows users to add and view various dashlets that provide valuable data specific to the record. For more information regarding the Record View's Intelligence Pane, please refer to the Intelligence Pane section of this documentation. To access the list view, simply click the Tasks module tab. While list view shows key task fields, you can click the task's name to open the record view. For more information on viewing tasks via list view, please refer to the Tasks List View section of this documentation.

## Viewing Via Record View

The Tasks record view displays thorough task information including all relevant task fields followed by subpanels of the task's related records belonging to various modules. Users can also access the activity stream to view posts specific to the task record. For more information on the Record View's Activity Stream, please refer to the Activity Stream section of this documentation. The Intelligence pane can also be viewed to the right of the record's details and allows users to add and view various dashlets that provide valuable data specific to the record. For more information regarding the Record View's Intelligence Pane, please refer to the Intelligence Pane section of this documentation. The record view can be reached by clicking a task record's link from anywhere in the application including from the Tasks list view. For more information on viewing tasks via the record view, please refer to the Tasks Record View section of this documentation.

## Viewing Via Recently Viewed

As you work, Sugar will keep track of which tasks you have recently viewed. Click the Actions menu in the Tasks module tab to see a list of your most recently viewed tasks, and click each name to open the Tasks record view.



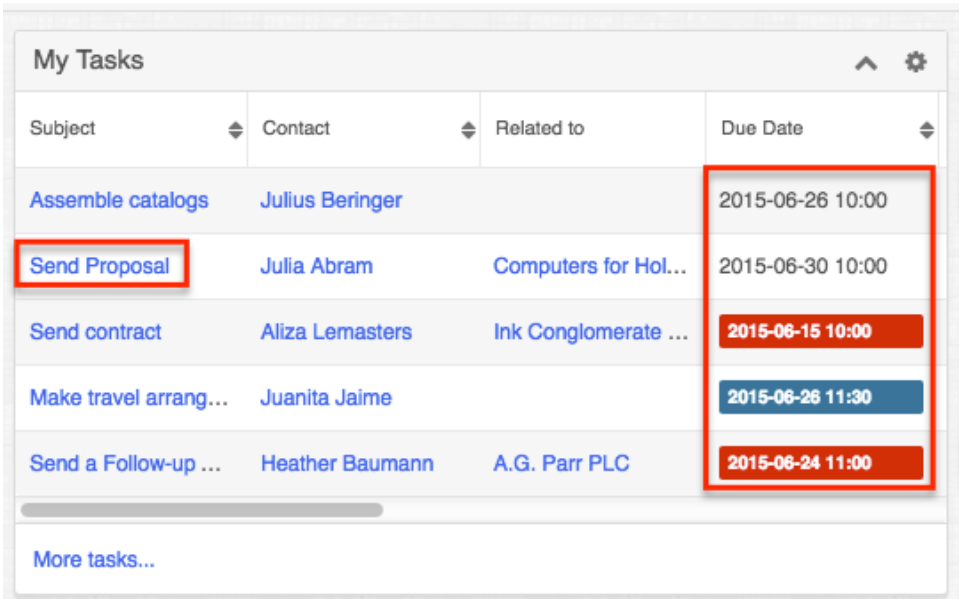

## Viewing Via Dashlets

Sugar Dashlets allow users to get a quick view of various records, activities, reports, etc. Dashlets may be added to a user's Home page or to the intelligence pane of any module. You can view task information in task-based dashlets such as "Active Tasks" and "Inactive Tasks". Clicking the task's subject from the dashlet will open the Tasks record view. For more information on using dashlets and viewing task records via dashlets, please refer to the Intelligence Pane documentation.

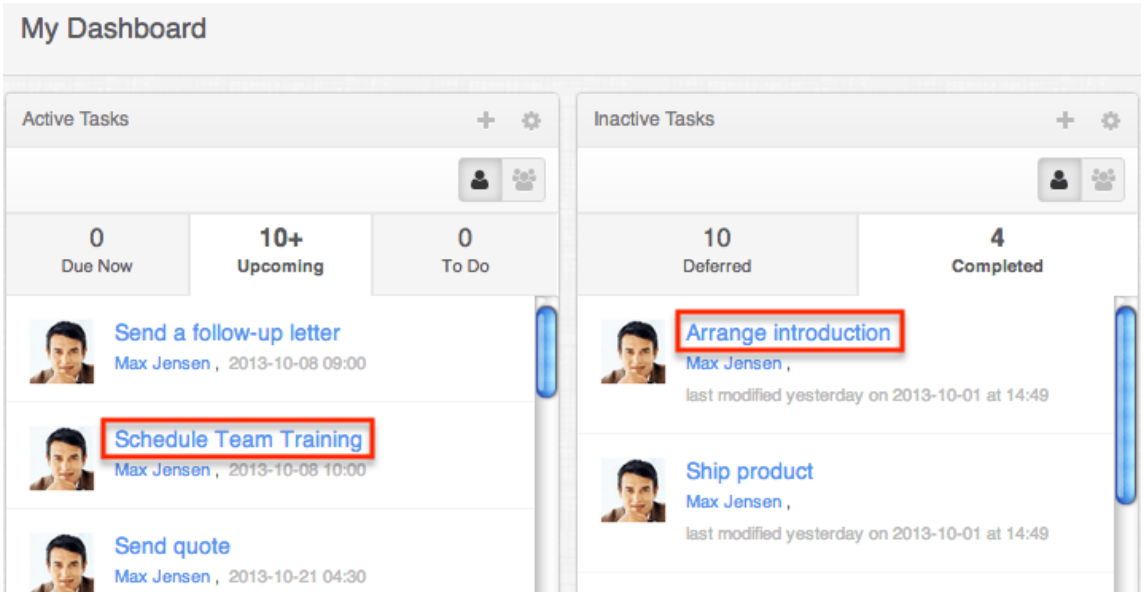
When viewing the Tasks dashlet, the due date will be highlighted in one of two colors: blue or red. This allows users to quickly view scheduled tasks that are either overdue or due within the next 24 hours. Please note that the due date will not be highlighted for tasks with a status of "Completed" or with a due date in the future (beyond 24 hours from current date and time).

The due dates in the Tasks dashlet are highlighted as follows:

- Blue : The task is open, and the due date occurs within the next 24 hours.
- Red : The task is open, and the due date has passed.

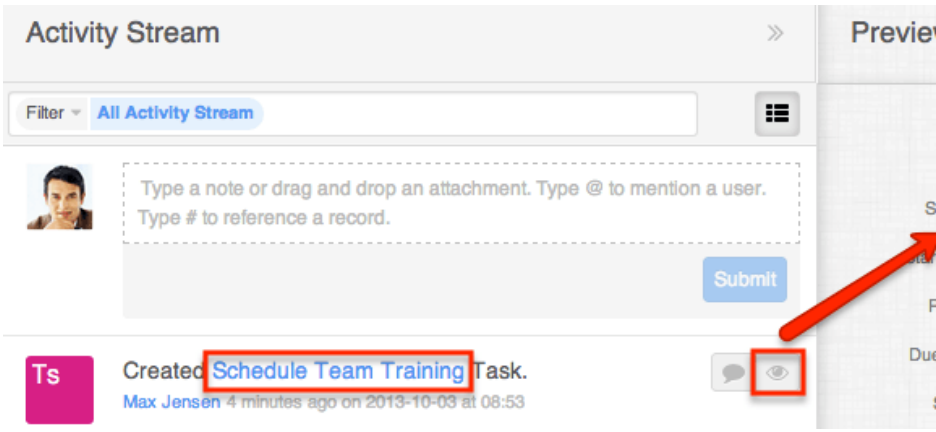



Active and Inactive Tasks dashlet:



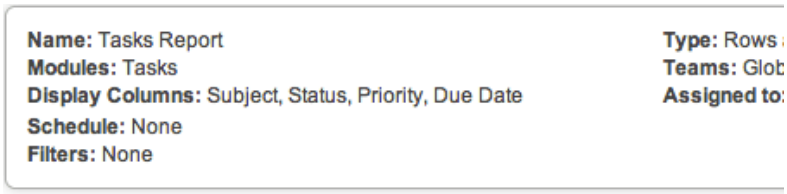

## Viewing Via Activity Streams

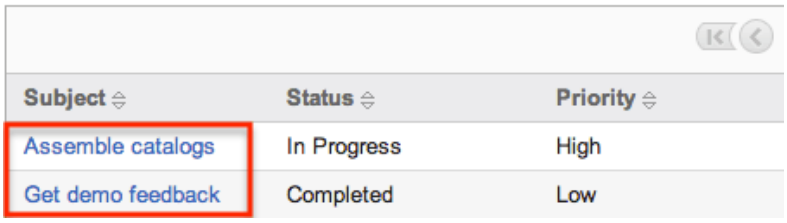
The activity stream allows users to view each other's activities in Sugar and the actions that took place for the various modules (e.g. Tasks, etc.) via posts (record post, user post, etc.). You can access the Tasks record view by clicking the task's name referenced in the post. You can also preview the task record's detail directly from the activity stream by clicking the Preview button to the right of the post. For more information on viewing records via the activity stream, please refer to the Activity Streams documentation.




## Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding tasks and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the tasks record view by clicking the task's subject in the report results. Please note that you can only directly access record views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation.



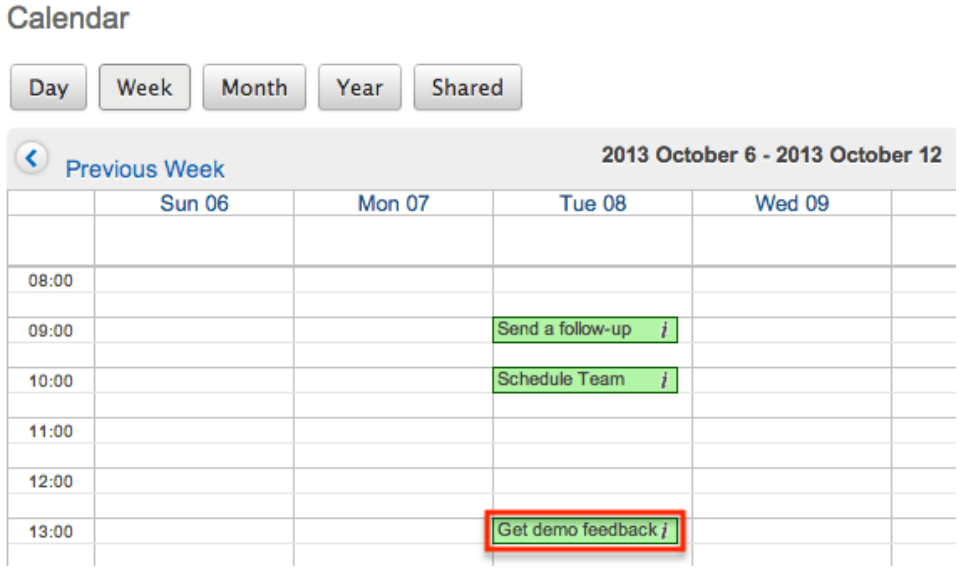




Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

## Viewing Via Calendar

When tasks are created in Sugar, they appear in the assigned user's calendar

based on the set due date of the task. For example, if you create a task due on October 8th at 1pm and assign it to user John Smith, then the task will appear in that user's calendar per the specified due date and time. You can view the quick details of the task by clicking the "i" icon on the task record cell and view/edit the actual task record by clicking the Eye or Pencil icon in the popup window. For more information on viewing via calendar, please refer to the Calendar documentation.




## Searching Tasks

The Tasks list view includes a module search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Tasks list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %schedule). This will pull up any record that has the word "schedule" in the name, regardless of how it starts or ends.

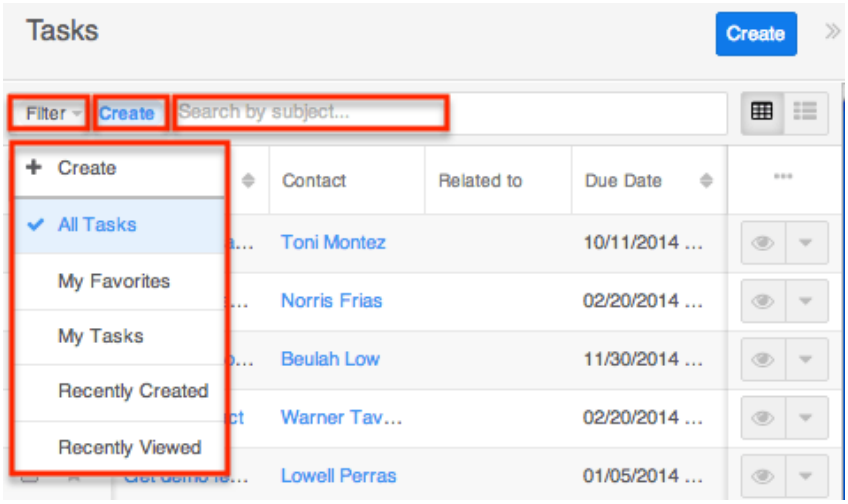
For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

### Module Search

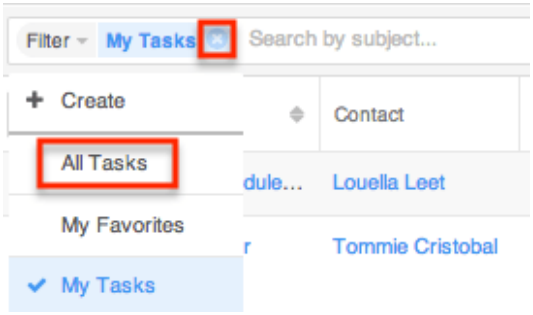
Module search enables users to easily search by task name within the Tasks module and pull up matching records in the list view. The search also provides a

Filter option which can be used in combination with the open Search box to narrow your search further using the available options as follows:

- Create : Create a new custom filter which you can use to filter your search
  - Note: You can also click "Create" to the right of the Filter option.
- All Tasks : Returns all records in the module to which you have access
- My Favorites : Returns only records you have marked as favorites
- My Tasks : Returns only records assigned to you
- Recently Created : Returns only records you created in the module within the last 7 days
- Recently Viewed : Returns only records you have viewed within the last 7 days




When you choose a filter, Sugar will return tasks which match both the selected filter and any name provided in the "Search by subject..." bar in the filtered list view results. For example, if you select "My Tasks" in the Filter options and enter a task name, Sugar will only return task records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search bar. To see all task records to which you have access, simply select the All Tasks option in the filter and remove any text from the search bar. You can also click the Clear icon within the selected filter option (e.g. My Tasks) in the Search bar to clear the filter and pull up all list view search results. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.




Please note that you will only be able to see task records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Administrators can configure what fields appear on the Tasks Module Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

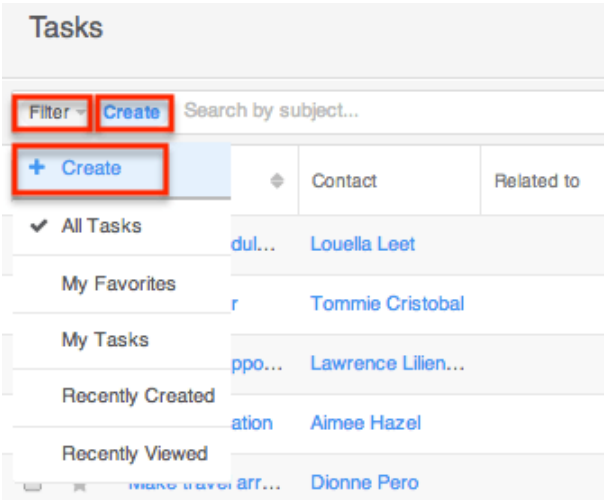
Creating a Filter

Users can also create new filters via the Create option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the Tasks list view. You have the option to add multiple fields to your new filter by clicking the Plus button to the right of the filter selection dropdown lists and set select operators along with their value(s). A filter's criteria need to be true for a record in order for it to appear in the list view search result. Additionally, filters with no specified values may be saved as a custom filter to act as a filter template when a user often searches using the same fields but with varying values. Please note that only fields you have view access for will appear in the Filter list when creating a search filter.

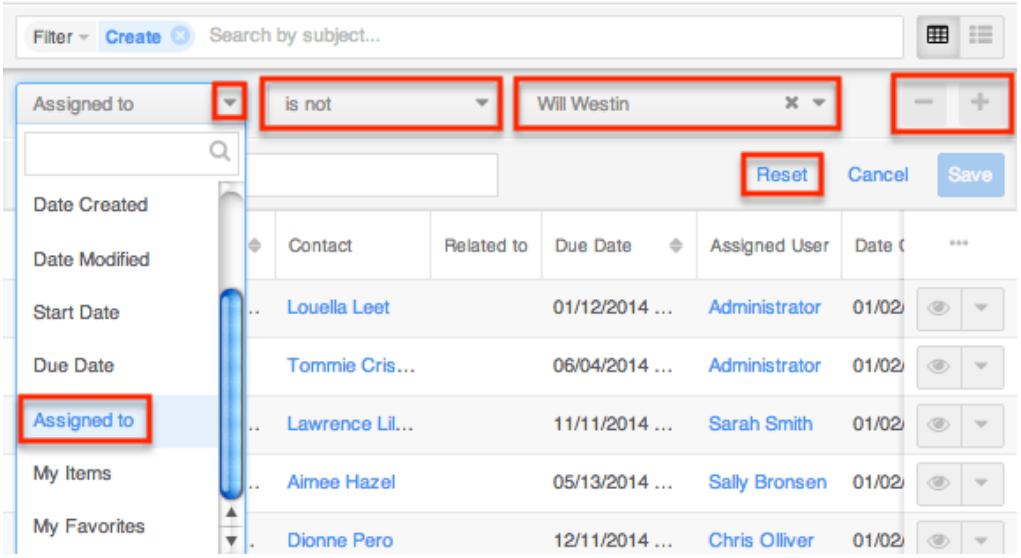
When you run a search using a created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.

The following steps cover creating a new Assigned to filter as an example:

1. Click the Filter option on the Tasks search bar then select "Create".
    - You can also click "Create" to the right of the Filter option.




2. Select the field you wish to add to your filter as well as the condition and matching criteria.
    - Note: Only fields you have view access for will be available to add in the Filter list.
3. To add additional fields to the new filter, click the Plus button to the right of the filter.
    - To remove fields from the new filter, click the Minus button to the right of the filter.
    - To clear any filter values (e.g. Will Westin), simply click the "x" to the right of the value or select "Reset" to the left of the Save button.



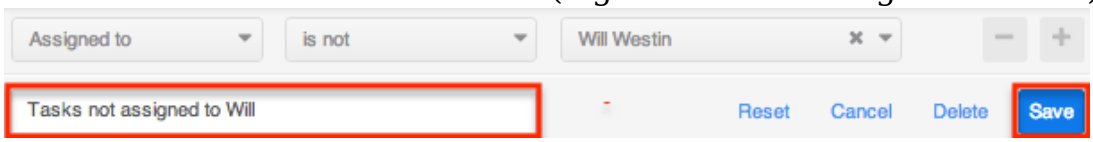

The list view will automatically display results matching your filters as you create and modify the criteria.

## Saving a Filter

Saving a filter will preserve the chosen fields as well as the condition(s) of the matching value(s). Additionally, it will allow users to easily select previously

created and saved filters from the Filter options.

The following steps cover saving a new search by Name filter as an example:

1. Create a new filter to perform a search on your desired fields.
2. Enter in a name for the new filter (e.g. "Tasks not assigned to Will").


3. Click "Save" to add this filter to the module's Filter options.

## Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search is used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.




To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

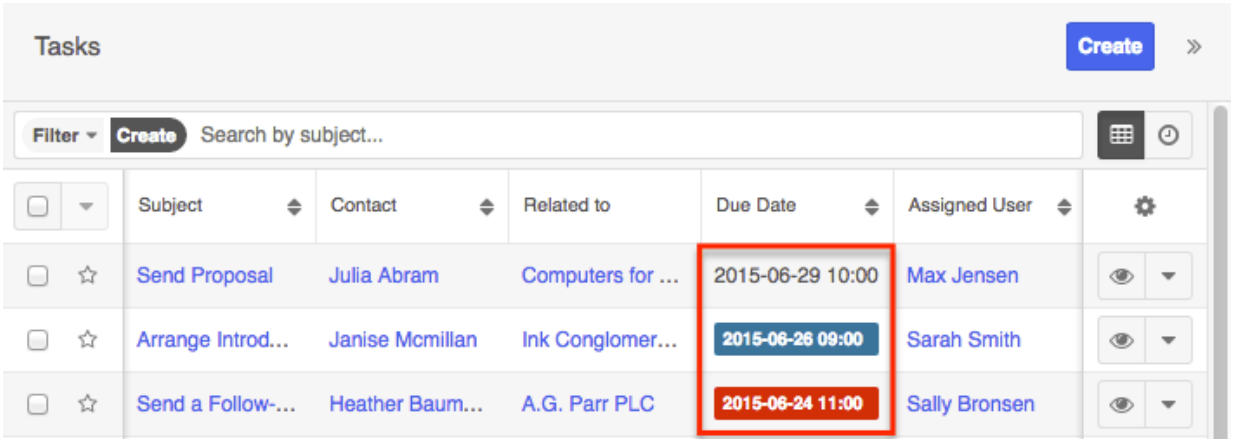
# Tasks List View

The Tasks list view displays all task records meeting the current search criteria and to which your user has access. You can view the basic details of each task within the field columns. Please note that you will only be able to see task records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

When viewing the Tasks list view, the due date will be highlighted in one of two colors: blue or red. This allows users to quickly view scheduled tasks that are either overdue or due within the next 24 hours. Please note that the due date will not be highlighted for tasks with a status of "Completed" or with a due date in the future (beyond 24 hours from current date and time).

The due dates in the Tasks list view are highlighted as follows:

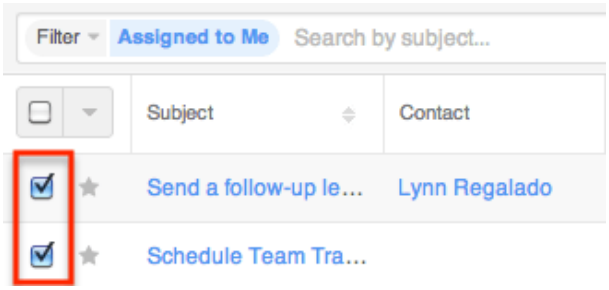
- Blue : The task is open, and the due date occurs within the next 24 hours.
- Red : The task is open, and the due date has passed.



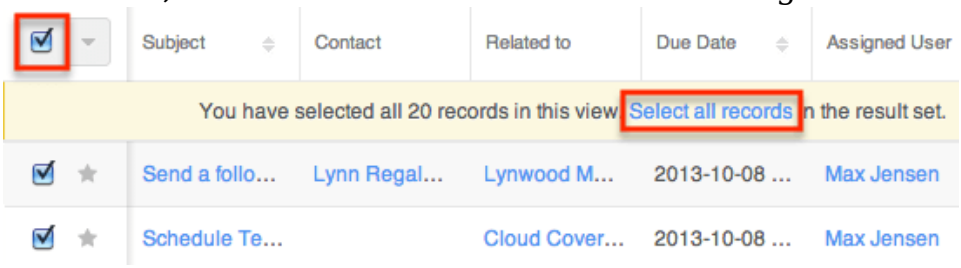

Users with administrator or developer access have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Checkbox Selection

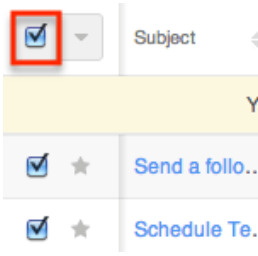
You can perform several actions on task records directly from the list view by first selecting the desired records. To select individual task records on the Tasks list view, mark the checkbox on the left of each row.




To select all task records displayed on the current set of list view results, click the checkbox to the left of the Actions menu. A dialog will appear below the list view column headers indicating that you have selected all records on the list view's current results set (e.g. 20). To select all records matching the current search results set, click "Select all records" in the dialog.

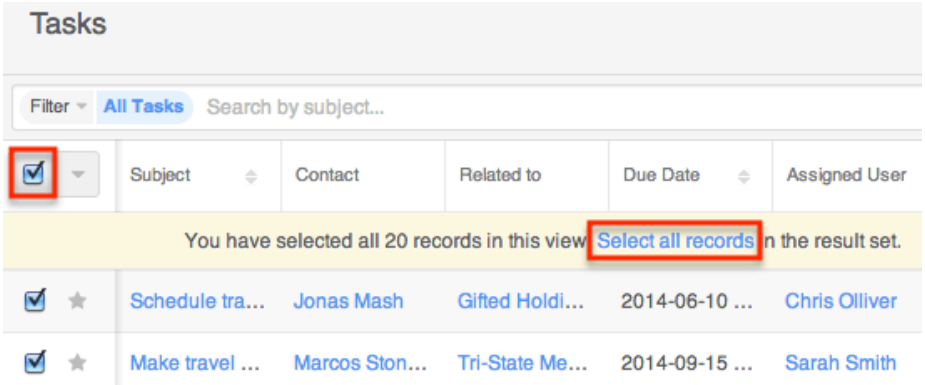



If you wish to clear the selection for all records on the list view result set, simply click "Clear selections" in the dialog. You can also clear the selections for all records by clicking the checkbox option again to remove the check marks.

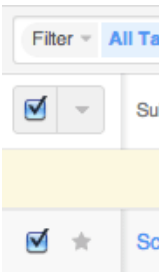



## Total Record Count

You can view the total record count on the Tasks list view by selecting all records displayed on the current set of list view results. Once the records are selected, a dialog will appear allowing you to select all records in the results set.

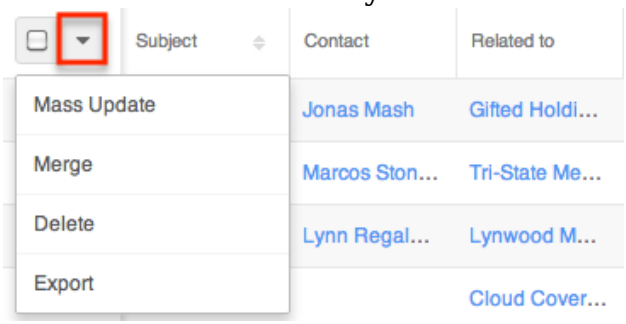


The total count of all records on the list view result set will appear in the dialog.




## Mass Actions Menu

The Actions menu to the right of the checkbox option allows you to perform various actions on the currently selected records.



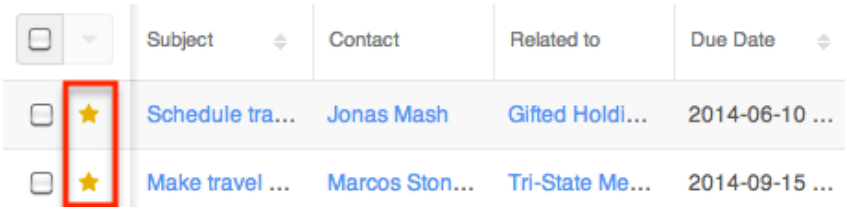

The options in the Mass Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Mass Update | Mass update one or more tasks |
| Merge | Merge one or more tasks |
| Delete | Delete one or more tasks |
| Export | Export one or more tasks to a CSV file |
| Recalculate Values | (Available in certain circumstances) Updates calculated values to reflect changes to calculated fields made in Studio |

## Favorite Designation

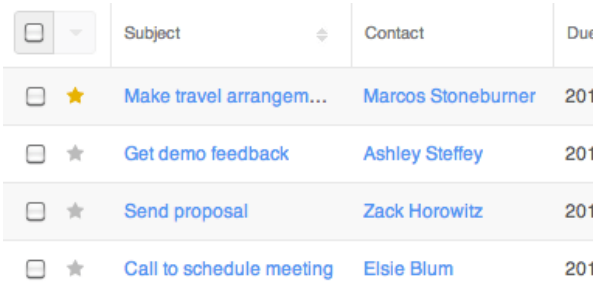
Users have the option to mark task records as favorites via the list view as well as the record view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the Tasks module tab. In the Tasks list view, the star on the left of each task's row is orange once marked to indicate a favorite task. For more information on how to mark records as favorites, please refer to the Favoriting Tasks section of this

documentation.




## Closing Tasks

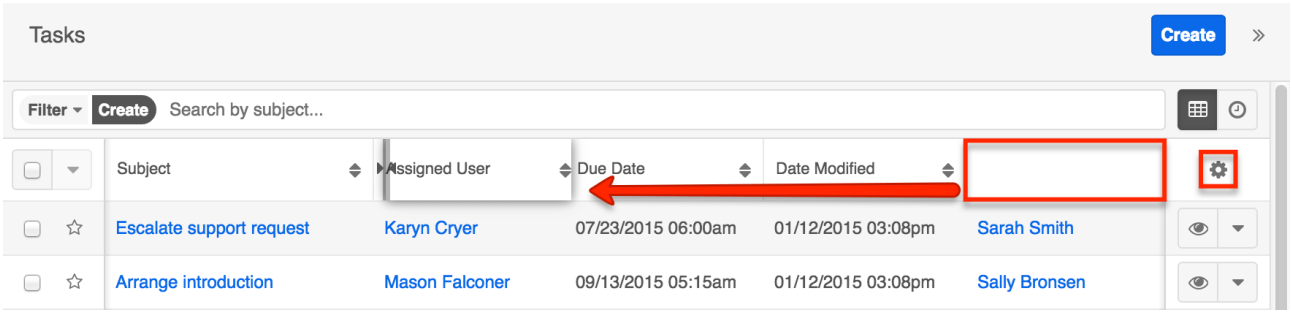
Tasks in Sugar have a status field which indicate whether a task is Deferred, Not Started, In Progress, or Completed. Closing a task will set its status to "Completed". In addition to closing tasks via the Tasks record view, user's can also close tasks directly from the Tasks list view. Simply click the Record Actions menu to the far right of the record's row and select "Close".




For more information on closing tasks please refer to the Closing Tasks section of this document.

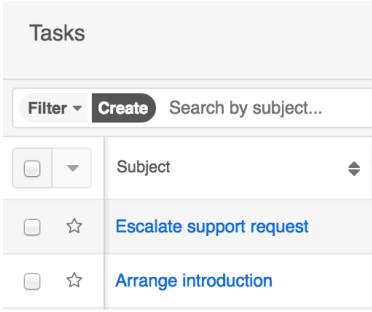
## Column Reordering

List view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the default column order.



## Column Resizing

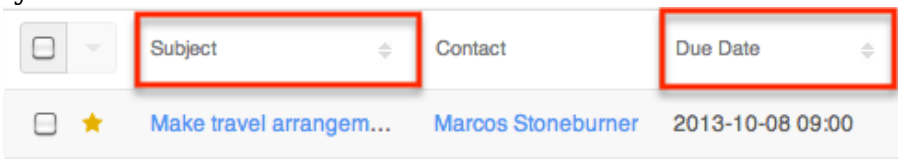
Users can easily adjust the size of columns in the Tasks list view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the current list view is different from the default column width. Changes to the column width made by administrators in Studio are only respected if the user has not resized the specific column in the list view. The column size set by the user will supersede the default column width configured in Studio until the user resets the list view back to the default widths.




## Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows.

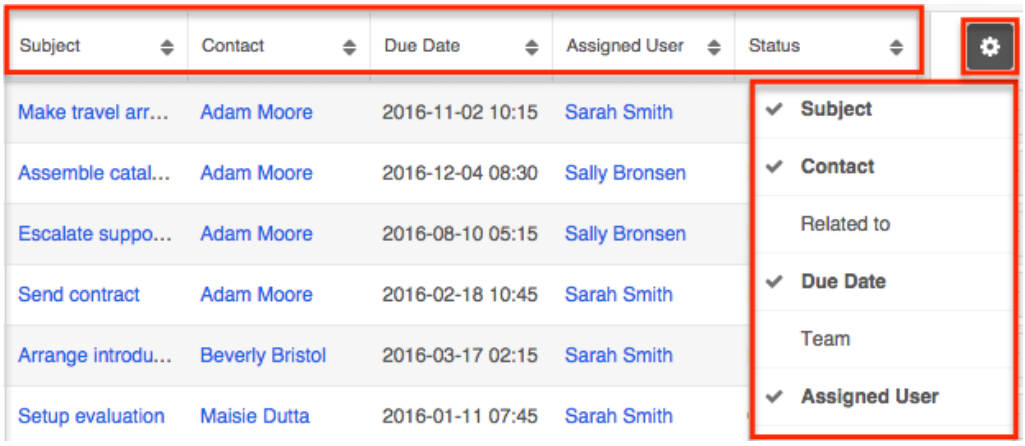
Note: List views may only be sorted by one column at a time and cannot be sorted by custom relate fields.




## Column Selection

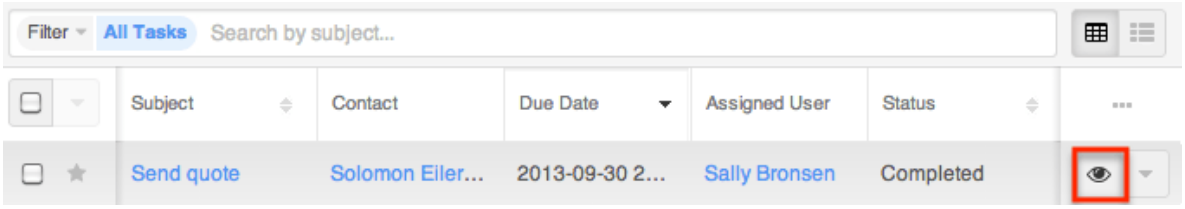
Sugar gives users the ability to personalize the list view by specifying which fields they want to be displayed in the list view. You can click the Column Selection icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column on your list view. Please note that administrators have the ability to configure what fields are

available to display in the list view via Admin > Studio. For more information on configuring fields to display in the list view, please refer to the Studio documentation in the Administration Guide.

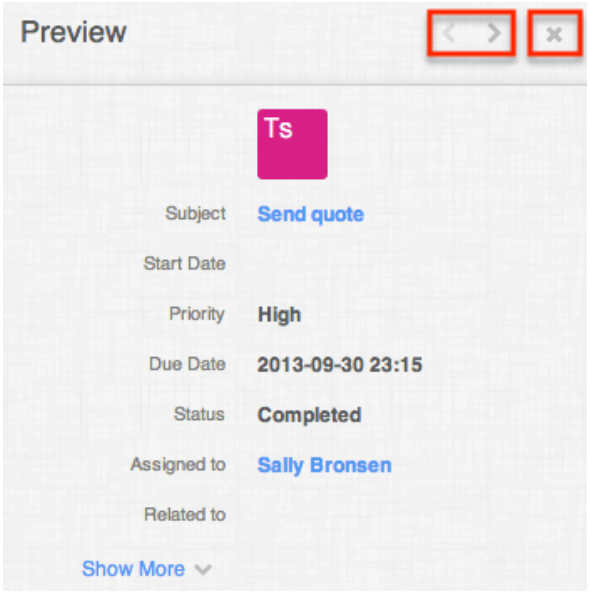



## Preview

Users can view a record's details directly from the Tasks list view by clicking the Preview icon to the far right of each task's row.

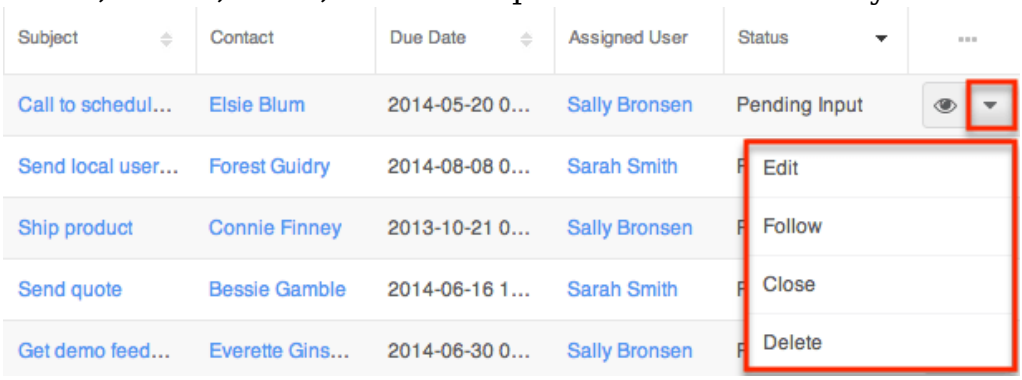



The record's data will display to the right of the list view providing key information regarding the record as well as the related activity stream information. On the upper right of the intelligence pane, there is a Left and Right arrow button that allows you to scroll through the list view's current search results by previewing the next or previous record. To close the preview, simply click the "X" on the upper right of the intelligence pane.



## Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to edit, follow, close, or delete specific records directly from the list view.

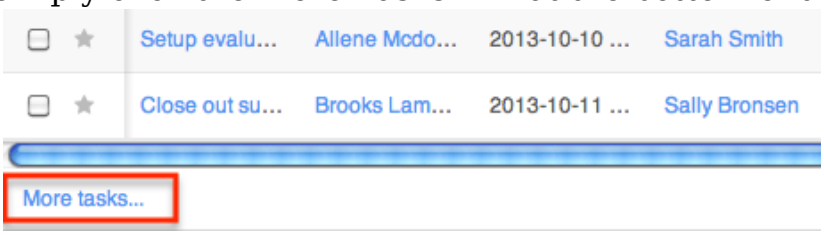



The options in the Record Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this task |
| Follow | Follow this task |
| Close | Close this task |
| Delete | Delete this task |

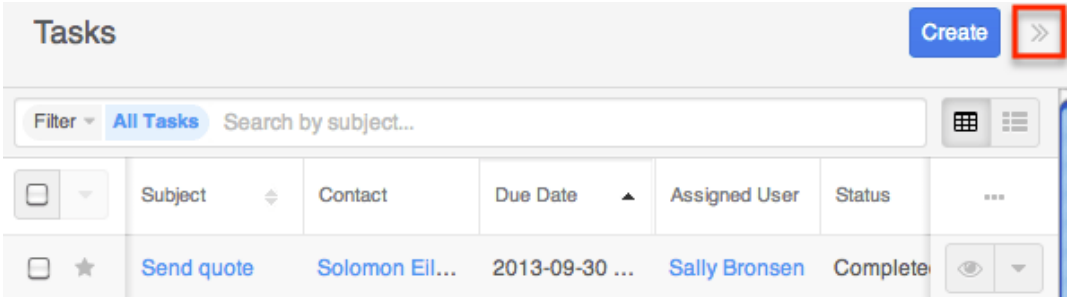
## More Tasks

The list view loads an initial number of records meeting the current search criteria with the option to show additional results at the user's request. By default, Sugar displays 20 records per list view results set, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide. To load the next set of list view results, simply click the More Tasks link at the bottom of the list view.



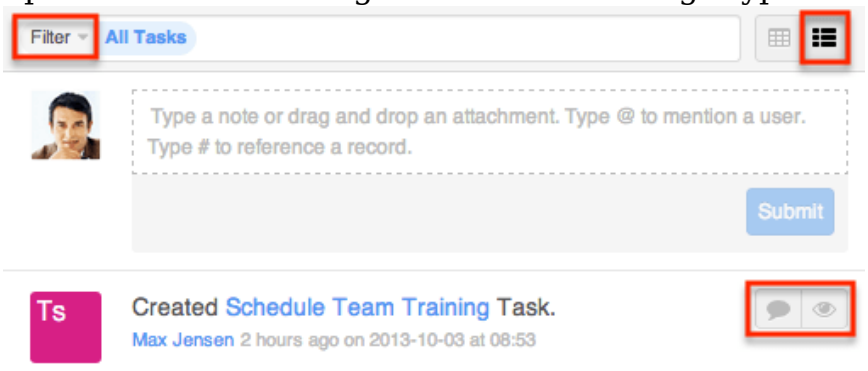

## Right Hand Side Drawer

On the upper right of the Tasks list view there is a double arrow icon which allows users to expand the list view to the full screen width. The intelligence pane to the right of the list view will be hidden when the list view is expanded. To reduce the list view's width and reveal the intelligence pane, simply click the double arrow icon again.




## Activity Stream

The Tasks module's activity stream displays user posts made on the Tasks module and record posts relevant to an individual task record. To view the module's activity stream, simply click the Activity Stream button to the right of the list view's search bar. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts using the comment button to the far right of each post. You can also preview the record referenced in record posts by clicking the Preview button to the right of each post. The activity stream can be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box and selecting the desired message type.

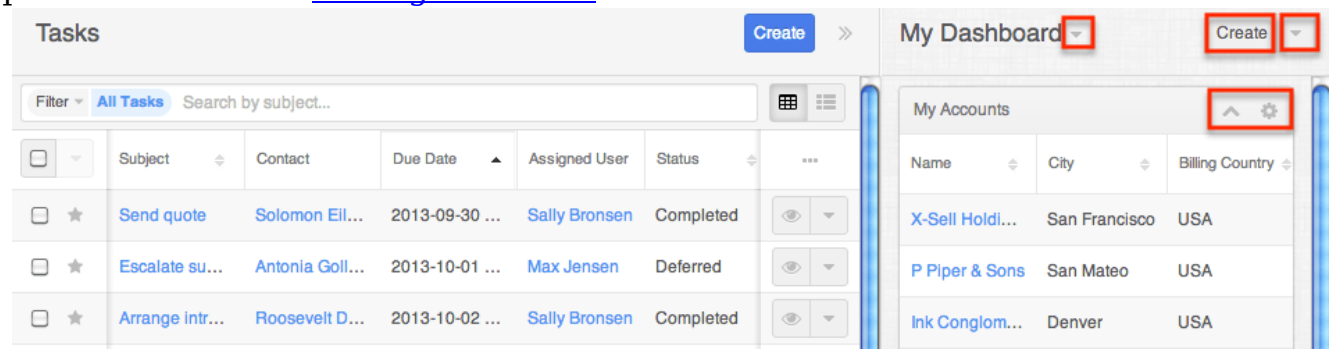



## Intelligence Pane

An intelligence pane displays to the right of the Tasks list view and provides users with valuable record information via various dashlets. The Help dashboard normally displays by default along with the List View Help dashlet and Learning Resources dashlet. The List View Help dashlet provides users with a brief introduction to the module along with a link (e.g. Tasks documentation) to the

corresponding documentation in the Application guide. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may create other dashboards for use with the Tasks module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets (e.g. Active Tasks, etc.) to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do no wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Tasks module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.




## Tasks Record View

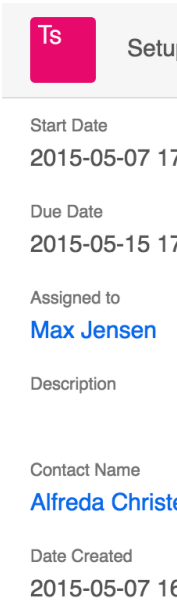
The Tasks record view displays thorough task information including all task fields. Beneath the fields you can toggle between viewing a task's subpanels ofrelated records and the task's activity stream. The record view can be reached by clicking a task record's link from anywhere in the application including from the Tasks list view.

Please note that you will only be able to view a task record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Users with administrator or developer access have the ability to change the record view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer tothe Studio documentation in the Administration guide.

## Actions Menu

The Actions menu on the top left of each task's record view allows you to perform various actions on the current record.

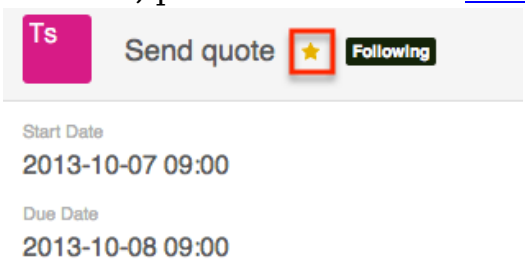
The options in the Actions menu allow you to perform the following operations:




| Menu Item | Description |
|---|---|
| Edit | Edit this task |
| Share | Share a link to this task via email |
| Download PDF | Download task information as a PDF file |
| Email PDF | Email task information as a PDF attachment |
| Close and Create New | Close this task as "Completed" and duplicate to a new task<br><br>Note: This option only appears as long as the status does not equal "Completed". |
| Close | Close this task as "Completed"<br><br>Note: This option only appears as long as the status does not equal "Completed". |
| Copy | Duplicate this task |
| Delete | Delete this task |

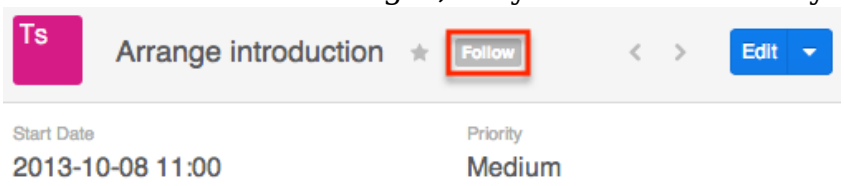
## Favorite Designation

Users have the option to mark task records as favorites via the record view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the Tasks module tab. In the Tasks record view, the star on the right of the task's name is orange once favorited. For more information on how to mark records as favorites, please refer to the Favoriting Tasks section of this documentation.



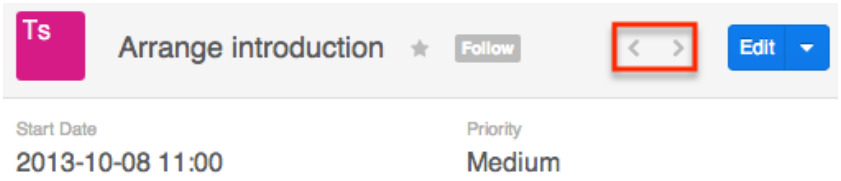

## Following Designation

Users also have the option to follow task records via the record view or list view. This allows users to view record posts from followed tasks on their Home page and Tasks list view activity streams. Each user can personalize their activity stream by viewing posts for records that are most important to them. From the record view, users may follow or unfollow tasks to which they have access using the Follow button to the right of the task's name. For more information on how to mark records to follow via the list view, please refer to the Record Actions Menu section of this documentation. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. If you wish to stop following a specific task record, click the Following button to revert it to gray. Should a user lose access to a record in Sugar, they will automatically stop following that record.



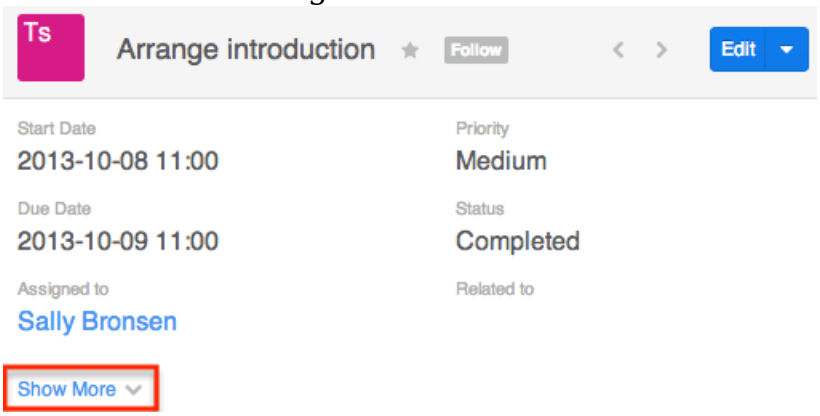

## Next or Previous Record

On the upper right of the Tasks record view, there are two buttons that allow you to page through each task in the Tasks list view's current search results. Clicking the Left arrow button displays the previous task of the current search results while clicking the Right arrow button displays the next task of the current search results.



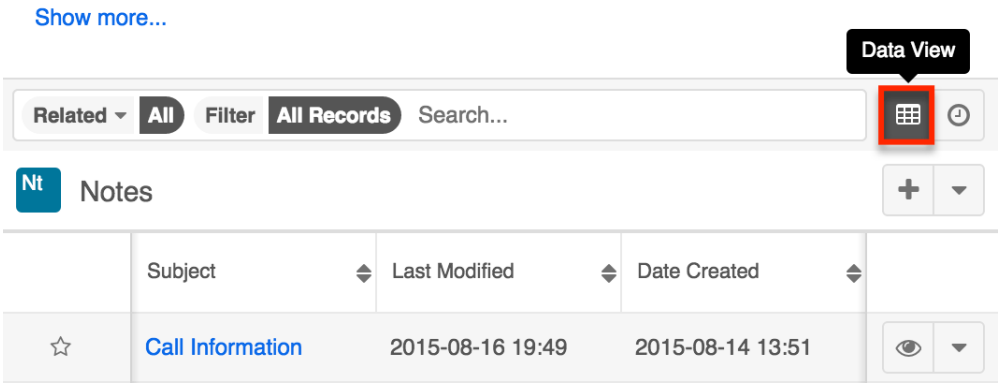

## Show More

The Tasks record view typically display a few key fields (e.g. start date, priority, status, etc.) on the business card panel with the option to view more fields by clicking the Show More link on the bottom left. Please note that administrators can configure what fields appear on the business card panel via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.



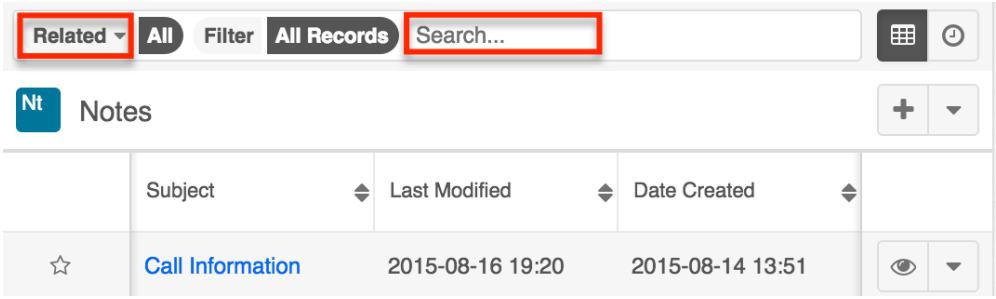

## Subpanels

Beneath a task record's fields are subpanels containing related records from various modules as well as any related notes for the task. Selecting the Data View button will display the subpanels rather than the record's activity stream.

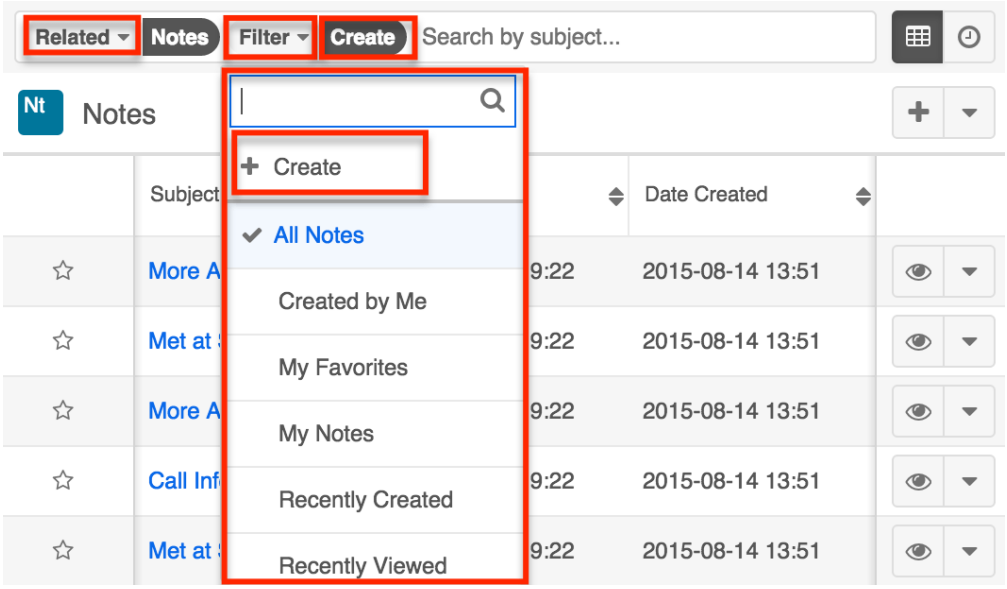



## Filter Options

While in Data View, all of the task record's related records will be displayed beneath the task record's fields. Users have the ability to search for records which appear in the subpanels as well as filter the view to only display a specific module (e.g. Notes). To locate a record by name, enter the keyword into the Search bar, and the subpanel(s) with the matching record(s) will appear below. To filter, simply click the Related option to the far left of the Search bar and select the module whose subpanel you wish to view. Filter and search may be combined to only display matching records within a selected module. To see all subpanels to which you have access, simply select "All" in the Related options and remove any text from the search bar. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the page. Returning to the page will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.




When a Sidecar module (e.g. Notes) is selected from the Related options, you have the option to filter the related subpanels further using one of the available options (e.g. My Favorites, Recently Created, etc.). Please note that you can also create custom filters for related Sidecar modules. Once the related module (e.g. Notes) is selected, either click the Filter option and select "Create" or click "Create" to the right of the Filter option. For more information on creating a related records filter, please refer to the Creating a Related Records Filter section of the Search documentation.



## Reordering Subpanels

Users can easily move subpanels to a new location on the record view by dragging and dropping the subpanel's header. The new subpanel order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared.

Note: By default, the only related module to the Tasks module is "Notes". Administrators can create new relationships between various modules in Sugar to create additional subpanels. For more information on creating relationships, please refer to the Studio documentation in the Administration guide.

## Related Record Subpanels

The types of subpanels displayed on a task's detail view contain the tasks related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. For example, a task may be related to only one contact but related to multiple notes. This means that the related contact will be displayed amongst the task's fields while notes will be displayed in a subpanel beneath the fields.

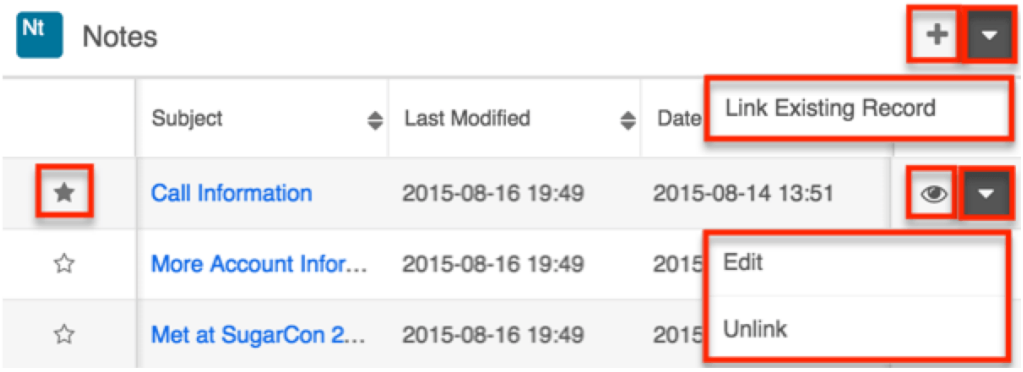
Users with administrator or developer access have the ability to change the fields (e.g. Name, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.

Related record subpanels allow the following operations to be performed:

- To view the details of a related record, click the record's name in the subpanel to open it in record view.
- To relate an existing record to the task, choose "Link Existing Record" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the task, click the Plus button to the left of the Actions menu, then complete the record view layout and click "Save".
- To preview the related record, click the Preview icon to the far right of the record's row in the subpanel.
- To inline edit the record directly from the subpanel, choose "Edit" from the Actions menu on the far right of the record's row and click "Save" to preserve the change.
- To delete the task's relationship to a record, choose "Unlink" from the Actions menu on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To mark the record as a favorite, click the star icon to the left of the desired

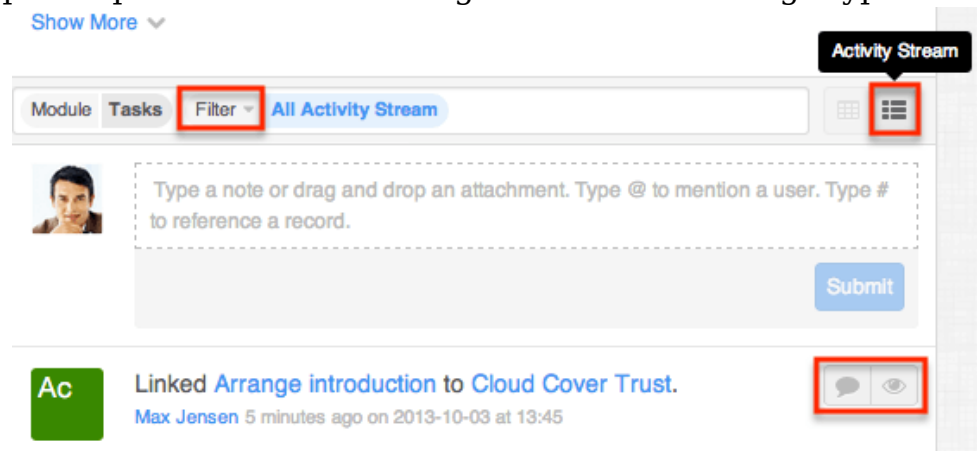
record's row.

- To collapse or expand the subpanel, click anywhere on the subpanel's header.
- To change the column size in the subpanel, place your cursor on the column divider and when the Left and Right arrow appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.




## Activity Stream

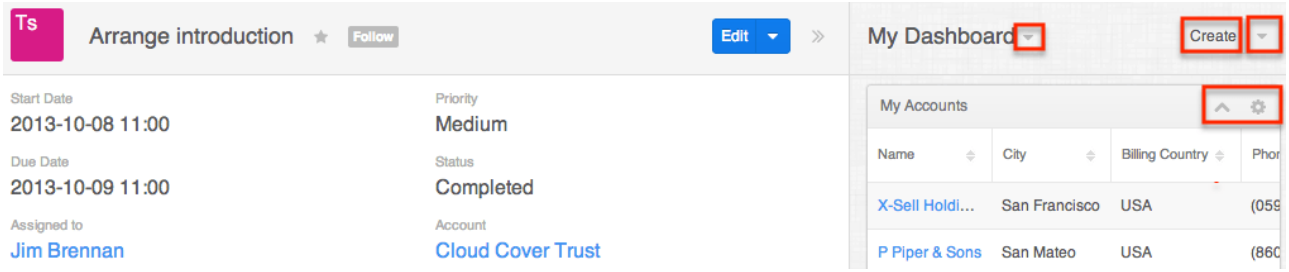
The Task record view's activity stream displays user posts and record posts specific to the individual task record. To view the record's activity stream, simply click the Activity Stream button below the task's fields. Users can view all posts in the record view's activity stream even if they do not follow the record in Sugar. Please note that you must follow the record if you wish to view the record view posts via the Home page or List View activity stream. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts by clicking the Comment button to the far right of each post, entering in your comment, then clicking "Reply". You can also preview the record referenced in the record post by clicking the Preview button. The activity stream can also be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box then selecting the desired message type.



## Intelligence Pane

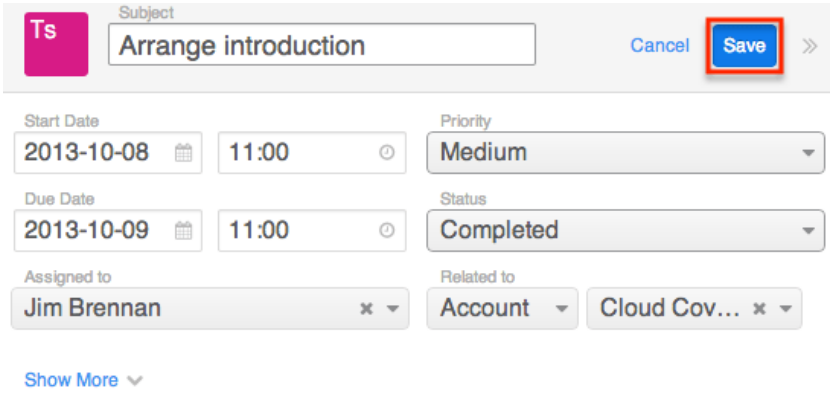
An intelligence pane displays to the right of the task's record view and provides users with valuable information specific to the task record. The Help Dashboard normally displays by default along with the Record View Help dashlet and Learning Resources dashlet. The Record View Help dashlet provides users with a brief introduction to the module along with some instructions to help users utilize and navigate around the record view. A link to the corresponding documentation (e.g. Tasks documentation) in the Application guide is also provided within the Help dashlet. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard, which will display some stock dashlets (e.g. Planned Activities dashlet, History dashlet , etc.) by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may choose to view any of their dashboards using the triangle to the right of the current dashboard's name and may create other dashboards for use with the Tasks module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do not wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Tasks module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.




# Editing Tasks

Tasks may be edited at any time to update or add information to the record. You can make changes to existing task records via the Tasks module as well as the Calendar module. The record view is available within the Tasks module and includes all of the Task fields you should need.

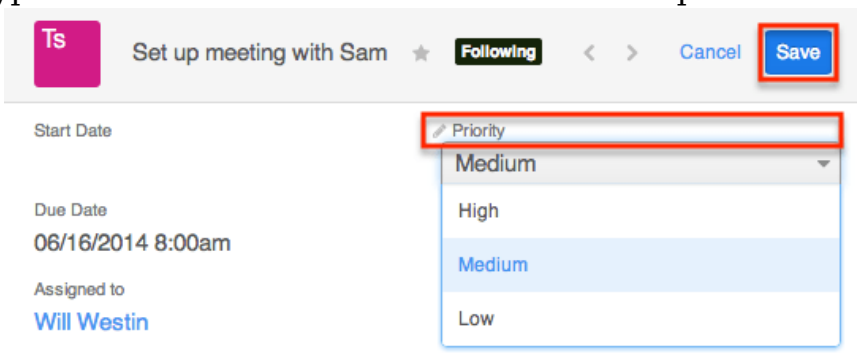



Please note that your ability to edit tasks in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure the Tasks record view via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

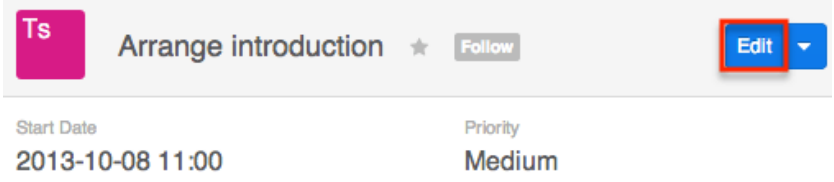
## Editing Inline Via Record View

Users can edit individual fields on the Tasks record view without entering the full edit mode by clicking the field name. Fields which are available for inline editing will display a pencil icon when hovering on the field name or value. This will allow users to type or select a new value. Click "Save" to preserve the changes made to the field.



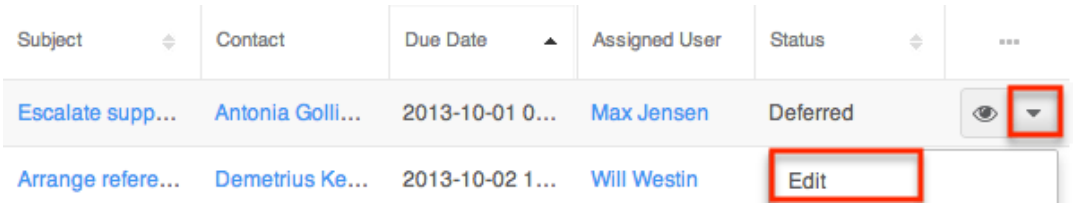

## Editing Via Record View

You can edit many task fields at once via the record view by clicking the Edit button on the upper right of the page. Once the record view layout is open, update the necessary fields, then click "Save" to preserve the changes made.

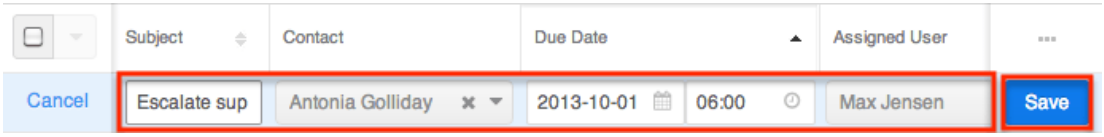


## Editing Inline Via List View

You can also edit individual fields on the Tasks list view without entering the full edit mode. Click the Record Actions menu to the far right of the record's row and select "Edit".



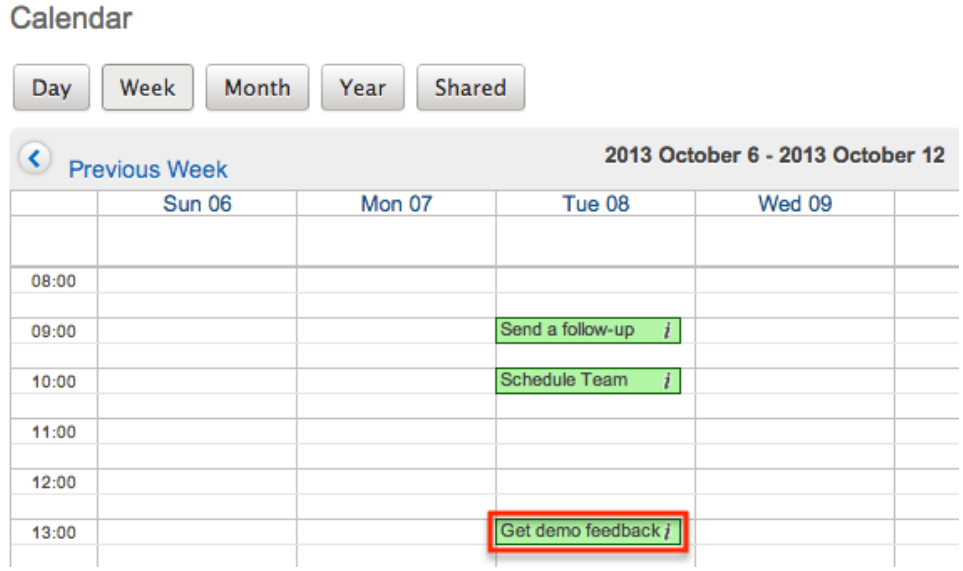

The fields on the record's row will open up allowing user's to type or select a new value. You can click the double arrow icon on the upper right of the page to expand the list view for editing. Click "Save" to preserve the changes made to the task record.




Note: Text area fields are not inline editable from list views.

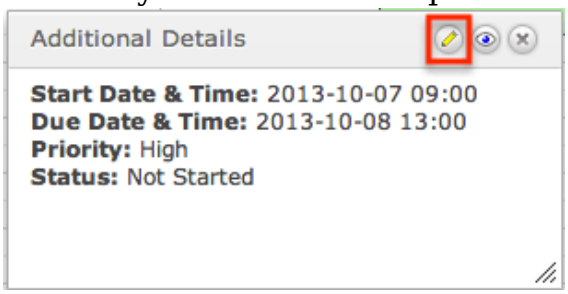
## Editing Via Calendar

Once tasks are created in Sugar, they appear in the assigned user's calendar based on the specified due date and time. You can click the "i" icon on the task record cell to view additional information regarding the task.




The Additional Details popup window displays the Pencil icon on the upper right, which opens up the Tasks record view for user's to make any changes as

necessary. Click "Save" to preserve the changes made to the task record.



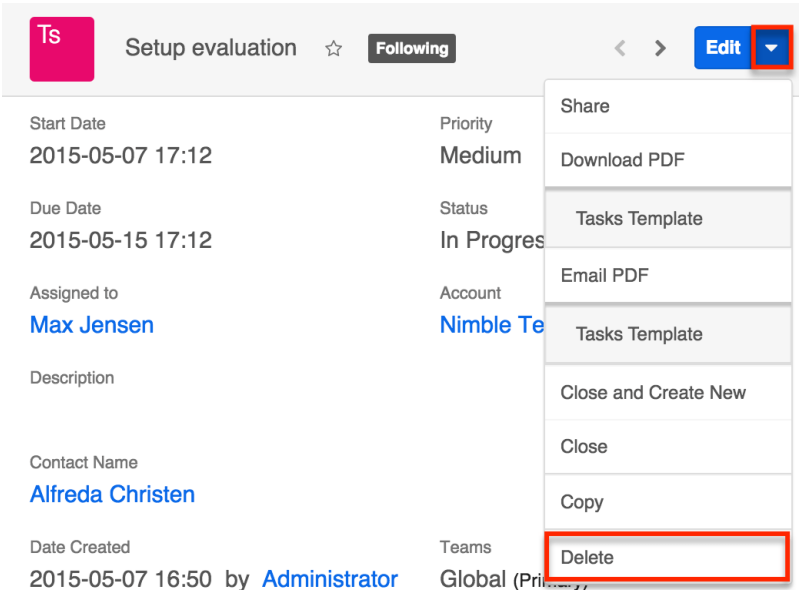

## Deleting Tasks

If a task record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Tasks record view or list view. Deleting via the record view allows you to delete a single record while the list view allows for mass deleting multiple records at once as well as single record deletions. Deleting task records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.
Please note that your ability to delete tasks in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

### Deleting Via Record View

Use the following steps to delete a task record via the record view:

1. Navigate to a task's record view.
2. Select "Delete" from the Actions menu.

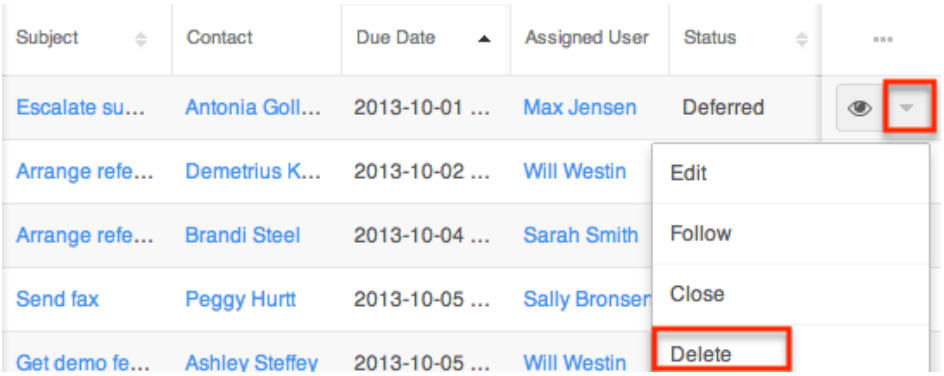



3. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

## Deleting Via List View

Use the following steps to delete a task record via the list view:

1. Navigate to the Tasks list view by clicking the Tasks module tab.
2. Use the Module Search to find the Task record you wish to delete.
3. Click the Record Actions Menu to the far right of the record's row and select "Delete".

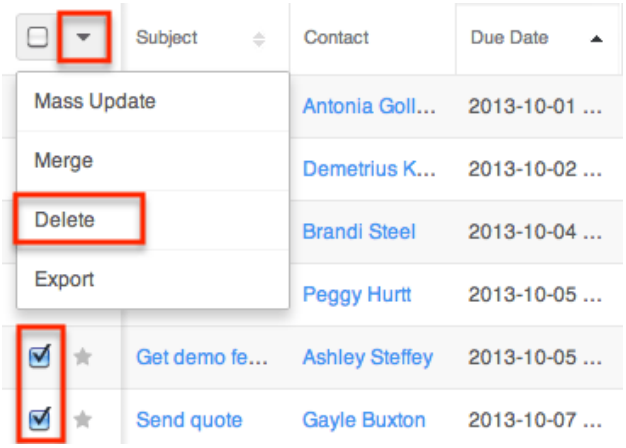



4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

## Mass Deleting Via List View

Use the following steps to delete one or more task records via the list view:

1. Navigate to the Tasks list view by clicking the Tasks module tab.
2. Use the Module Search to find the Task records you wish to delete.
3. Select the desired task records then choose "Delete" from the Actions menu.




4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

You can use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to delete more than 1000 records or delete a specific group of records on the list view, please use the filter option in module search to perform the deletions in smaller batches.

## Closing Tasks

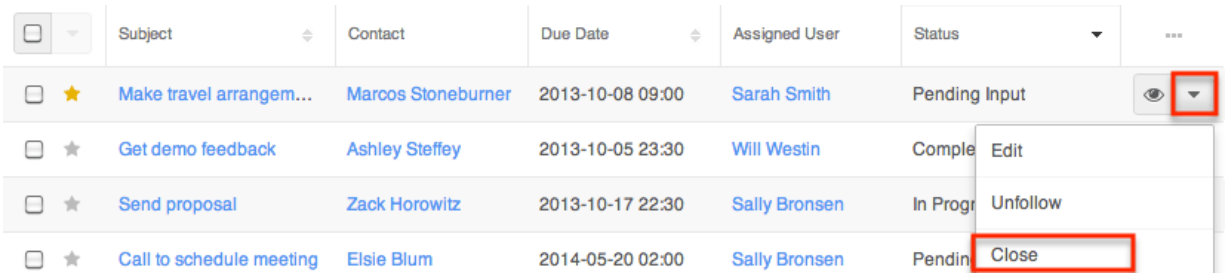
Tasks in Sugar have a status field which indicate whether a task is Deferred, Not Started, In Progress, or Completed. Closing a task will set its status to "Completed". There are various ways users can close tasks in Sugar: directly from the Tasks record view as well as from the Tasks list view.

### Closing Via List View

Use the following steps to close a task via the list view:

1. Navigate to the Tasks list view by clicking the Tasks module tab.
2. Use the Module Search to find the task records you wish to delete.

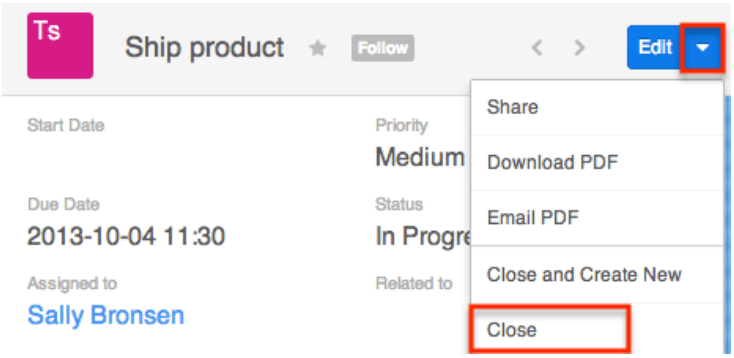
3. Click the Record Actions menu to the far right of the record's row and select "Close".




## Closing Via Record View

Use the following steps to close a task via the record view:

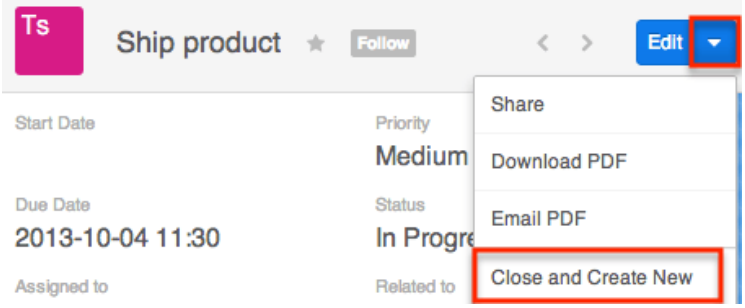
1. Navigate to a task's record view.
2. Select "Close" from the Actions menu.




## Closing and Creating New Via Record View

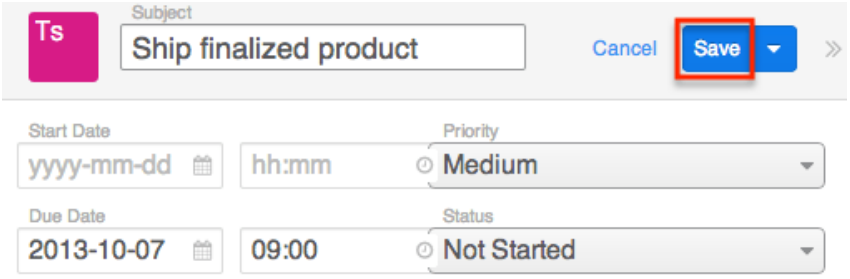
Use the following steps to close and duplicate a task via the record view:

1. Navigate to a task's record view.
2. Select "Close and Create New" from the Actions menu.




3. The displayed record view is pre-populated with the original task's values. By default, the new task's status is set to "Not Started". Update the necessary fields, then click "Save".
    - Please note that you can also click the Actions Menu to the right of the

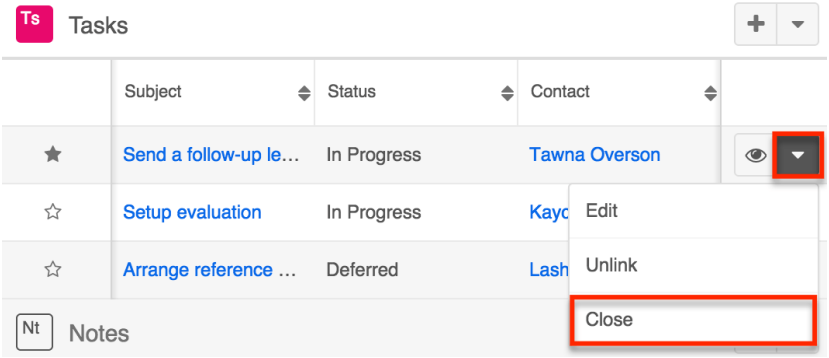
Save button to select the "Save and view" or "Save and create new" options. Save and view will display the record's details after the save is complete. The Save and create new option saves the current record and opens a new, blank record view in edit mode where the user can create another record.




## Closing Via Subpanels

Use the following steps to close a task from the Tasks subpanel in a different module.

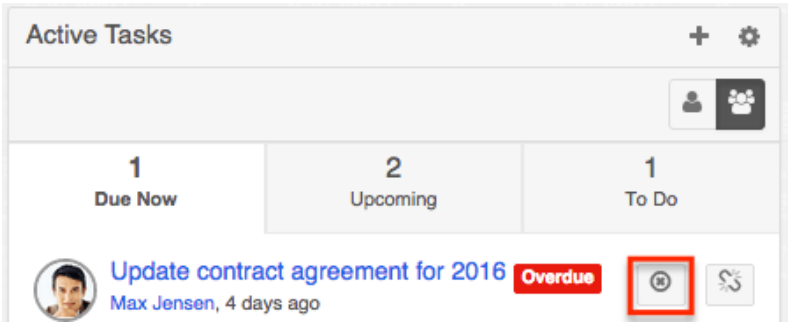
1. Scroll to the Tasks subpanel on a related record's record view.
2. Select "Close" from the Actions menu of the task record you wish to close.




## Closing Via Dashlet

Use the following steps to close a task via the Active Tasks dashlet:

1. Navigate to a the Active Tasks dashlet on your Home page or a module record view's (e.g. Accounts) intelligence pane.
2. Click the appropriate tab (Due Now, Upcoming, To Do) on the dashlet, then locate the task record to close.
3. Click the Completed button to the right of the task's row in the dashlet.



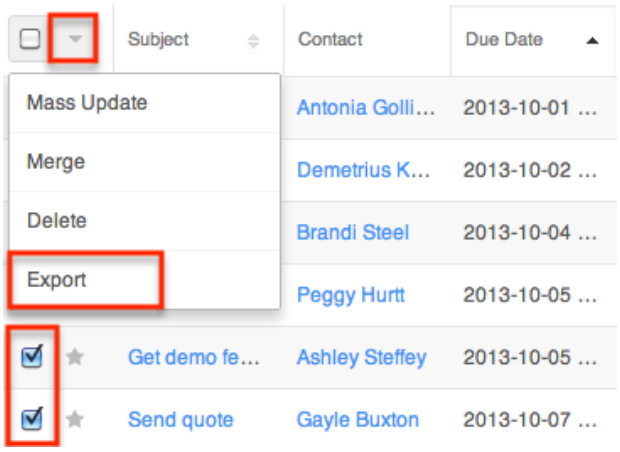

4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

Once the task is closed, the task record will be removed from the dashlet and the task's status will change to "Completed"

## Exporting Tasks

Sugar's Export option allows users to download all fields for the selected tasks to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use task data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered tasks back into Sugar. For more information on updating existing records via import, please refer to the Import documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of tasks records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.
Tasks may be exported from the Tasks list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for tasks and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.

Please note that your ability to export tasks from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

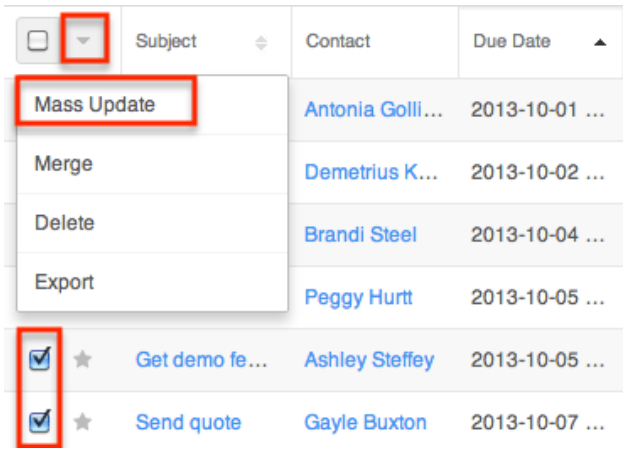



# Mass Updating Tasks

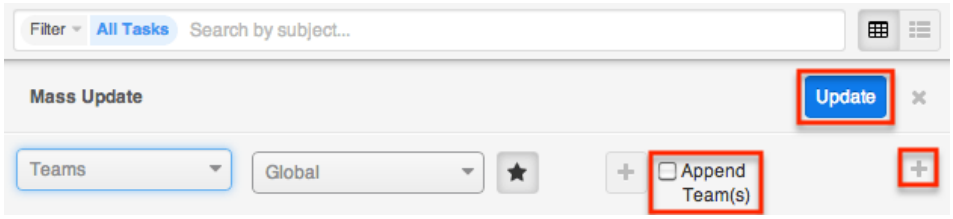
Mass Updating allows users to make the same change to multiple task records at once from the Tasks list view. Users with administrator or developer level access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide. You can use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to update more than 1000 records or update a specific group of records on the list view, please use the filter option in module search to perform the updates in smaller batches.
Please note that your ability to mass update tasks may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

Use the following steps to mass update task records from the list view:

1. Navigate to the Tasks list view by clicking the Tasks module tab.
2. Use the list view's Module Search to identify tasks you wish to modify.
3. Select the desired tasks then choose "Mass Update" from the Actions menu.




4. The Mass Update panel will appear below the search bar. Set values for the field(s) you wish to alter.
    - To add additional fields for mass update, click the Plus icon to the right of the dropdown list.Note: For the Teams field, mark "Append Team(s)" to add the teams specified here to any existing team assignments. Not marking the checkbox will replace the existing team assignment with the new one.




5. Click "Update" to save the changes to all of the currently selected task records.

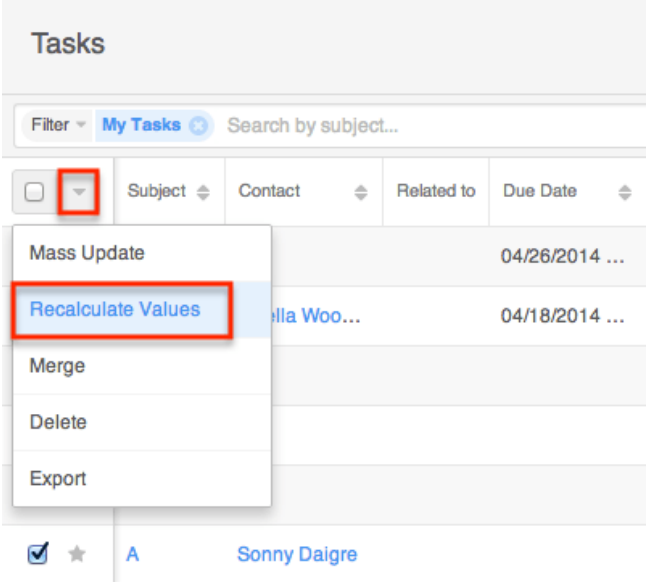
## Recalculating Calculated Values

This feature allows calculated values to be recalculated following the addition or alteration of a calculated field in Studio. For more information on calculated fields, please refer to the Studio documentation in the Administration guide. Sugar allows you to select up to 1000 records at a time for recalculating values. If you desire to recalculate values for more than 1000 records, you will need to perform the recalculation in several batches.

Note: This action will not appear unless the user is an Admin or has developer-level access to the module and if there is at least one calculated value in that module. Please note that your ability to recalculate values may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Recalculate Values option.

The following steps cover recalculating values for records from the Contacts list view as an example:

1. Navigate to the Contacts list view by clicking the Contacts module tab.
2. Use the list view's Module Search to identify contacts you wish to update.
3. Select the desired contacts then choose "Recalculate Values" from the Actions menu.




## Merging Tasks

When duplicate records are identified in Sugar, you have the option to merge two or more tasks into a single record. Once the merge is complete, the duplicate task record(s) will be deleted, and the primary record will remain. Please note that all relationships belonging to the duplicate tasks will be merged to the primary record meaning that any notes related to the duplicate task record(s) will automatically be related to the resulting, merged task record.

Note: Date Created, Date Modified, and Password field types are not supported when merging duplicate records in Sugar.

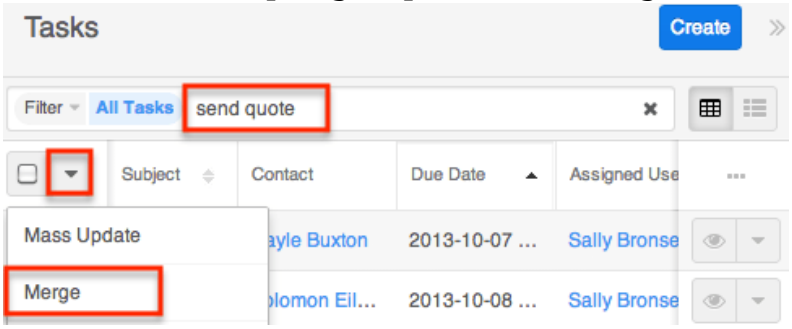
### Merging Via List View

Module Search may be used to identify duplicate tasks by, for example, searching for records with similar names. Once your search has identified duplicate tasks, you can merge them directly from the Tasks list view.

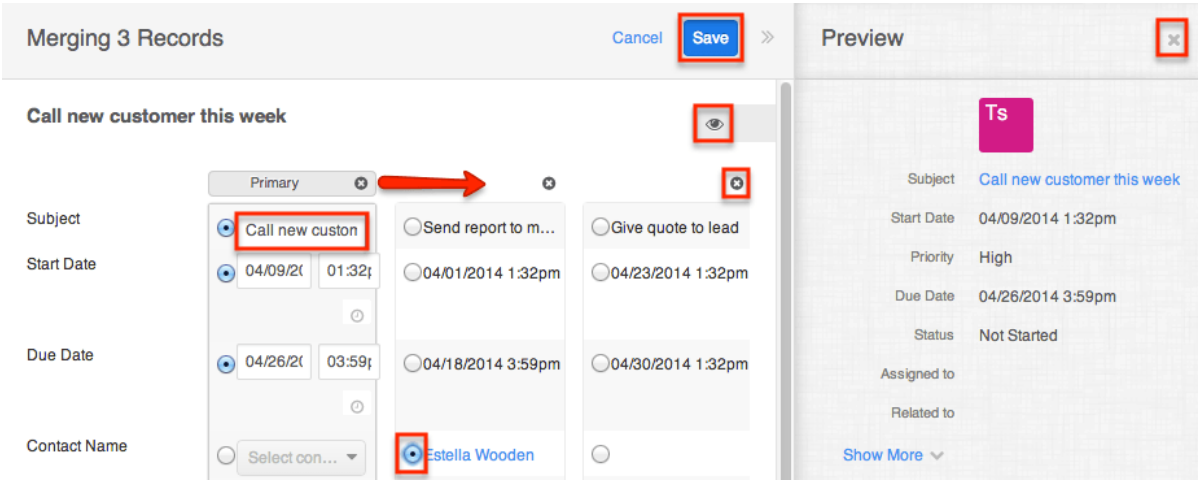
Use the following steps to merge tasks via the list view:

1. Use the list view's Module Search to identify duplicate tasks.
2. Possible duplicates will be displayed in the list view. Select the duplicate

record(s) that you wish to merge.
    - Please note that up to five records may be merged at once in Sugar. An error message ("Invalid number of records passed. The valid range is from 2 to 5 records.") will appear if more than five records are selected when attempting to perform a merge.




3. Select "Merge" from the Actions menu to display the Merging Records page. The primary record's field values are displayed on the left while other record's values are in columns to the right. For convenience, fields with differing values will appear on the top of the list. Saving the merge will preserve only the field values marked with the radio button into a single record.




If three or more records are selected to be merged, an X icon will appear at the top right of each record. Clicking the "X" will remove the record from the merge process but will not delete the record.

4. To change which record is considered the primary, drag and drop the Primary label on the top of a different column.
5. Review the field values in each column and click the radio button to the left of the value that should appear on the final record. You can also manually type or select a new value for certain fields as necessary.
    - Note: Fields you do not have Edit access for cannot be edited on the merging records page.
6. Preview what the final, merged record will contain as you work by clicking the eye icon to display the preview in the Intelligence Pane.

7. Click "Save" once all fields you wish to appear on the single, merged record have their radio buttons selected.
8. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Confirm" to proceed.

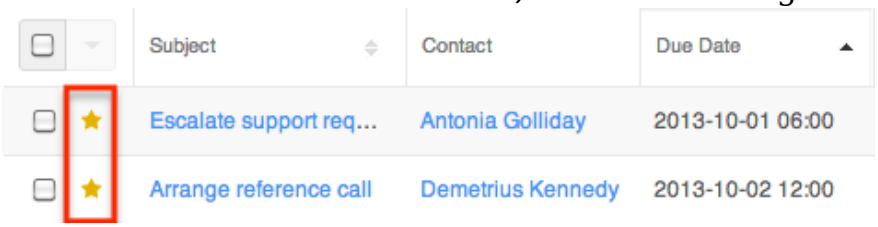
## Favoriting Tasks

Each Sugar user has the option to designate their own favorite tasks which are important or will be viewed often so that they can easily be accessed via search or from the Tasks module tab. Once records are marked as favorites, select "My Favorites" from the Filter option next to the Search bar to retrieve your favorites or select from your most recent favorites directly from the Tasks module tab.

### Favoriting Via List View

Use the following steps to mark records as favorites via the Tasks list view:

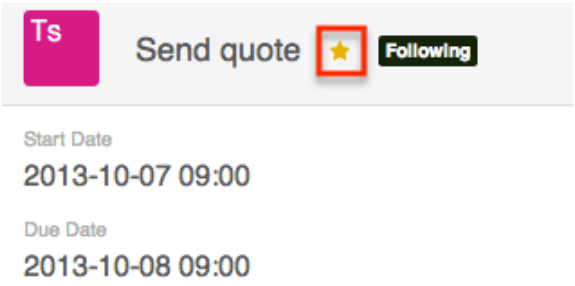
1. Navigate to the Tasks list view by clicking the Tasks module tab.
2. Use the Module Search to find the task records you wish to mark as favorites.
3. Mark the star icon on the left of each desired task's row.
4. To remove the task as a favorite, click the star again to revert it to gray.




### Favoriting Via Record View

Use the following steps to mark records as favorites via the Tasks record view:

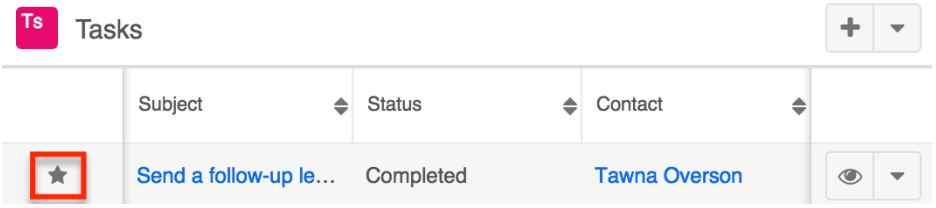
1. Navigate to a task's record view.
2. Click the star icon to the right of the task's subject in the upper left of the record view to designate it as a favorite.
3. To remove the task as a favorite, click the star again to revert it to gray.




### Favoriting Via Subpanel

Use the following steps to mark task records as favorites via the subpanel in related modules:

1. Navigate to a related module's record view.
2. Click the star icon to the left of the desired record's row in the Tasks subpanel.




3. To remove the task as a favorite, click the star again to revert it to white.

## Following Tasks

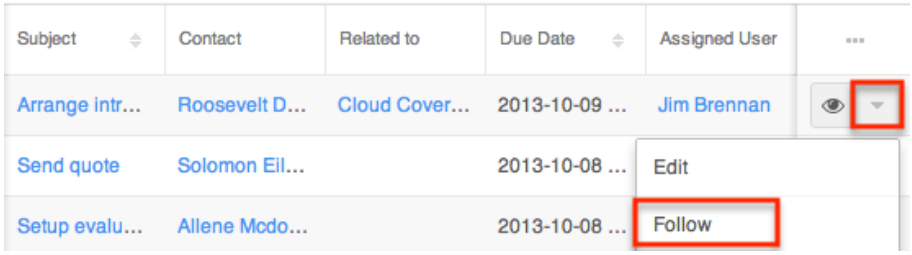
Users can also choose to follow specific task records to which they have access to in Sugar by clicking the Follow button (If grayed out) to the right of the task's name. This allows each user to personalize their activity stream by specifying which records' posts should appear on the activity streams displayed on their Home page and Tasks list view. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. Should a user lose access to a record in Sugar, they will automatically stop following that record.

### Following Via List View

Use the following steps to mark a record to follow via the Tasks list view:

1. Navigate to the Tasks list view by clicking the Tasks module tab.

2. Use the Module Search to find the Task records you wish to follow.
3. Click the Record Actions menu to the far right of the records row and select "Follow".
4. To stop following the task, click the Record Actions menu then select "Unfollow".

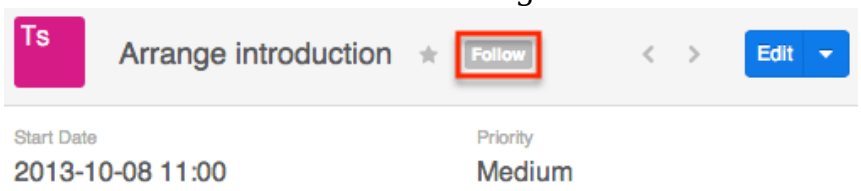



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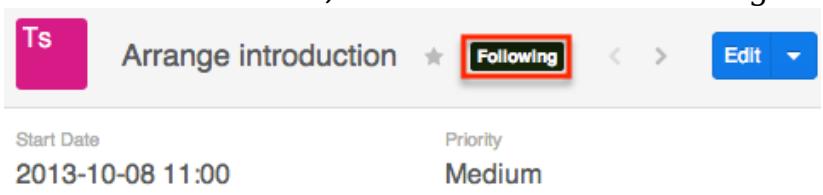
## Following Via Record View

Use the following steps to mark a record to follow via the Tasks record view:

1. Navigate to a Tasks record view.
2. Click the Follow button to the right of the tasks name.

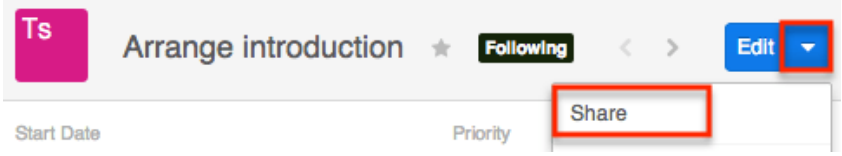



3. To unfollow the task, click the Follow button again to revert it to gray.




# Sharing Tasks

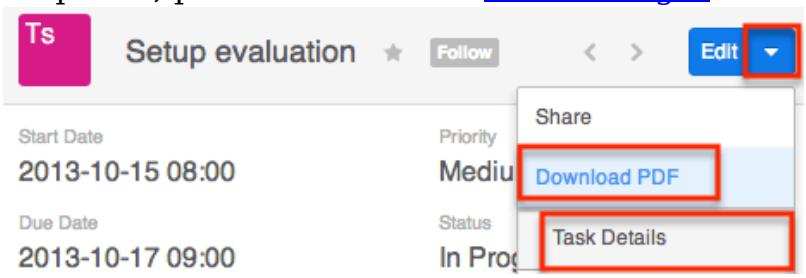
Individual Task records can be shared with other users in your organization by sending an email with the record's link directly from the record view. In the task's record view, select "Share" from the Actions menu which will open a Compose Email window including the URL of the task record. Enter the recipient(s) email address in the To field then click "Send".



Users can simply click the link in the email to access the task record in Sugar. Please note that the user must be logged into Sugar in order to access the record. Users will only be able to view the shared record as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

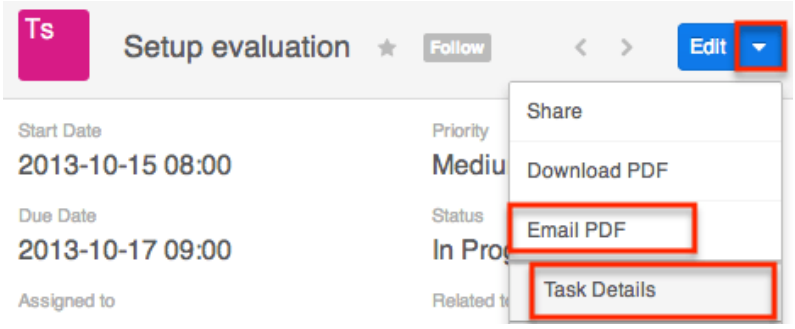
## Downloading Task Information as a PDF

Users have the option to download task information as a PDF file via the Tasks record view by clicking the Actions menu and selecting "Download PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Download PDF option in the Actions menu. Simply select one of the templates to generate the PDF file to view or save onto your local machine. Please note that the Download PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.

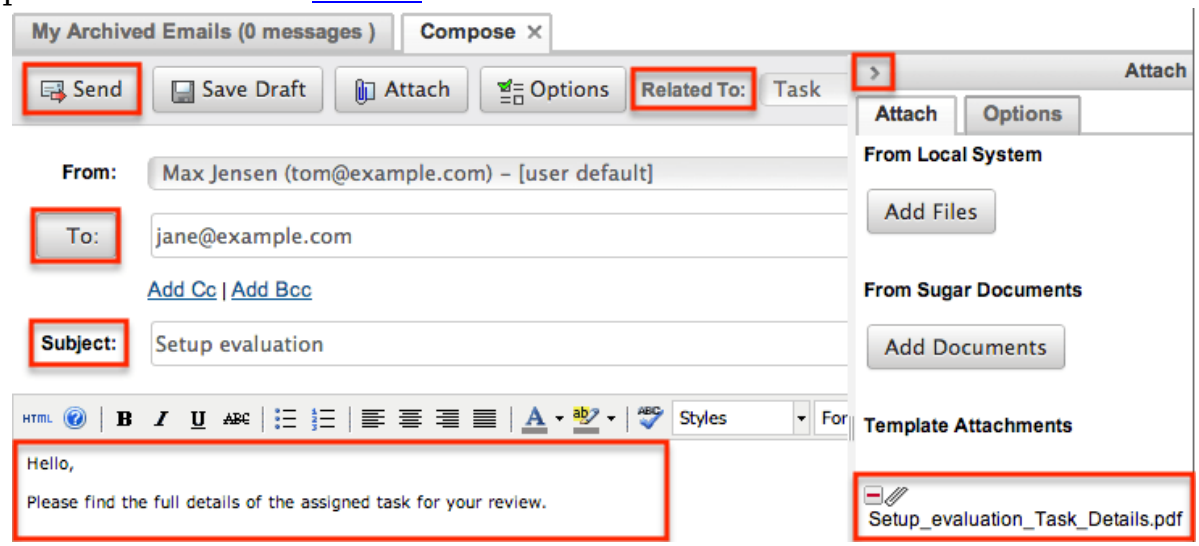



## Emailing Task Information as a PDF

Users also have the option to email task information as a PDF file using any of the available Tasks module templates using Sugar's email client. Simply click the Actions menu and select "Email PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Email PDF option in the Actions menu.



Select one of the templates to open a Compose window in the Emails module. The email's Subject field will display the tasks subject and you will need to enter the email address in the To field to which the PDF file will be sent. The email is automatically related to the task record, and the chosen task PDF will be attached. You can update the fields as necessary and enter a body for the email message then click "Send". For more information on sending emails via the Emails module, please refer to the Emails documentation.




Please note that the Email PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.

Last Modified: 12/21/2015 05:54pm

# Notes

## Overview

The Notes module consists of individual notes that contain text or an attachment pertinent to the related record. Note records can be related to one record in most modules via the flex relate field and can also be related to a single Contact. Notes can hold generic text about a record or even an attachment related to the record. There are various ways you can create notes in Sugar such as via the Notes module, importing notes, via History subpanels, etc. Once the note record is created, you can view and edit information pertaining to the note via the Notes record view. Each note record may then relate to other Sugar records such as accounts, contacts, opportunities, and many others. This documentation will cover how to use the Notes module as well as the various actions and options available

from within the module.

## Note Fields

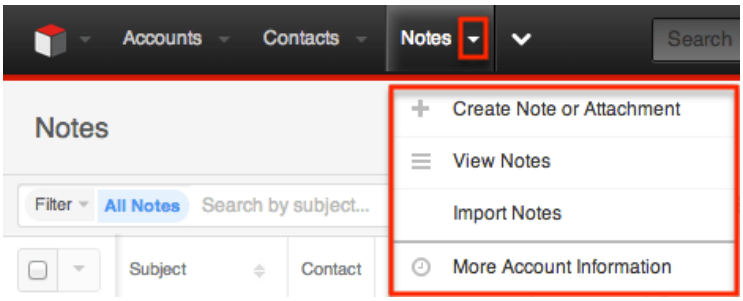
The Notes module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

| Field | Description |
|---|---|
| Assigned To | The Sugar user assigned to the note |
| Attachment | An optional file to attach to the note<br>Note : The Sugar administrator can specify the maximum file size allowed to be uploaded. |
| Contact | The contact record the note is related to.<br>Note : If populated, this note will show in the contact's History subpanel |
| Display in Portal? | Select this checkbox to allow the note to be displayed in the customer portal |
| Note | The details and content of the note |
| Related to | The module and record that is related to this note<br>Note : This will decide which module this note will show in the History subpanel |
| Subject | The subject or designation of the note |
| Teams | The Sugar team(s) assigned to the note record |

## Notes Module Tab

The Notes module tab is typically located under the More tab on the navigation bar at the top of any Sugar screen to the right of the home cube icon. Depending on your settings, you may have to click "Show More" in order to see the Notes module tab. Click the tab to access the Notes list view. You may also click the triangle in the Notes tab to display the Actions, Recently Viewed, and Favorites menu. The

Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of notes you last viewed in the module. The Favorites menu displays the list of notes you most recently marked as favorites in the module.




The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|---|---|
| Create Note or Attachment | Opens the record view layout to create a new note |
| View Notes | Opens the list view layout to search and display notes |
| Import Notes | Opens the import wizard to create or update notes using external data |

If you do not see the Notes module tab in Sugar, please check the following:

- The Notes module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Notes module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Notes module for your entire Sugar instance. Reach out to your Sugar administrator to have the Notes module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

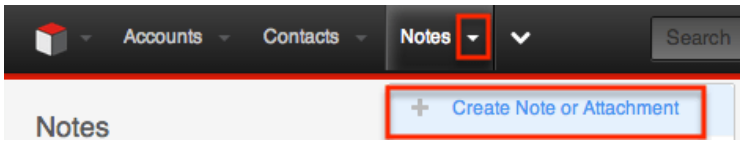
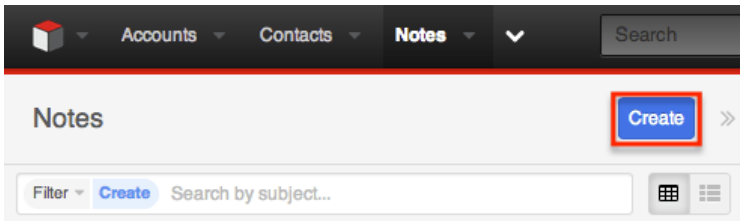
## Creating Notes and Attachments

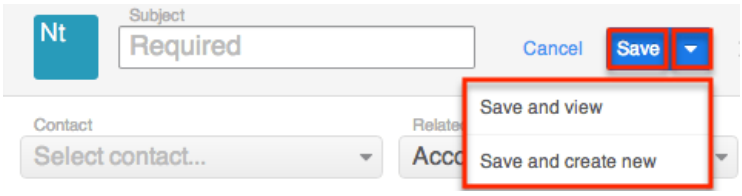
There are various methods for creating notes in Sugar including via the Notes module, quick create, duplication, importing notes, and via the history subpanel. The full record view layout opens when creating the note directly from the Notes menu and includes all of the relevant fields for your organization's notes. The quick create form is a shortened version of the notes record view and typically contains

fewer fields. When using quick create to make a note while viewing an existing record of another module, Sugar automatically creates a relationship between both records. For example, if you are viewing an account record (e.g. ABC Company) and create a new note via the quick create form, the Account module is selected and the Related to will automatically populate with "ABC Company", thus creating the relationship. Both the Record View and Quick Create layouts can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

## Creating Via Notes Module

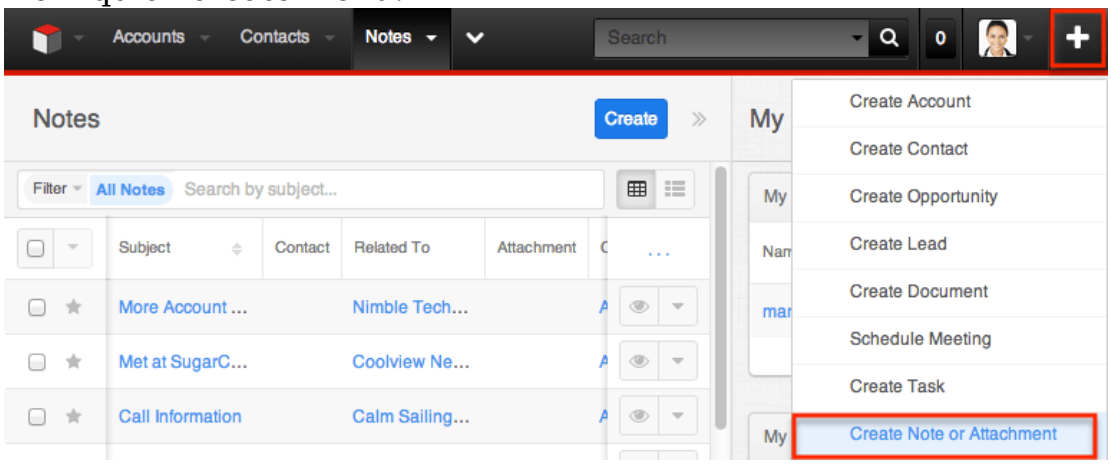
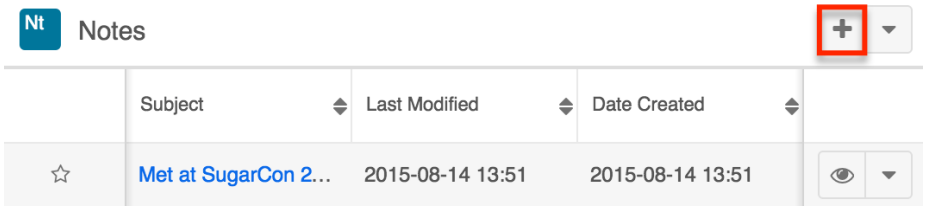
One of the most common methods of note creation is via the Create Note or Attachment option in the Notes module tab. This opens up the record view layout which allows you to enter in all the relevant information for the note.
Use the following steps to create a note via the Notes module:

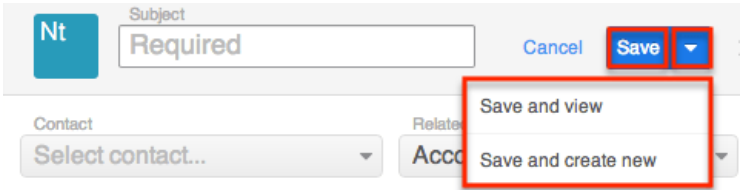
1. Click the triangle in the Notes module tab to open the actions menu and select "Create Note or Attachment". You can also click the Create button on the upper right of the Notes list view.
   From Notes module tab:
   
   
   From Notes list view:
   
   
2. Enter appropriate values for the fields in the record view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".
   - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.



## Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also quick create a note from any history subpanel on related module records.
Use the following steps to create a note via Quick Create:

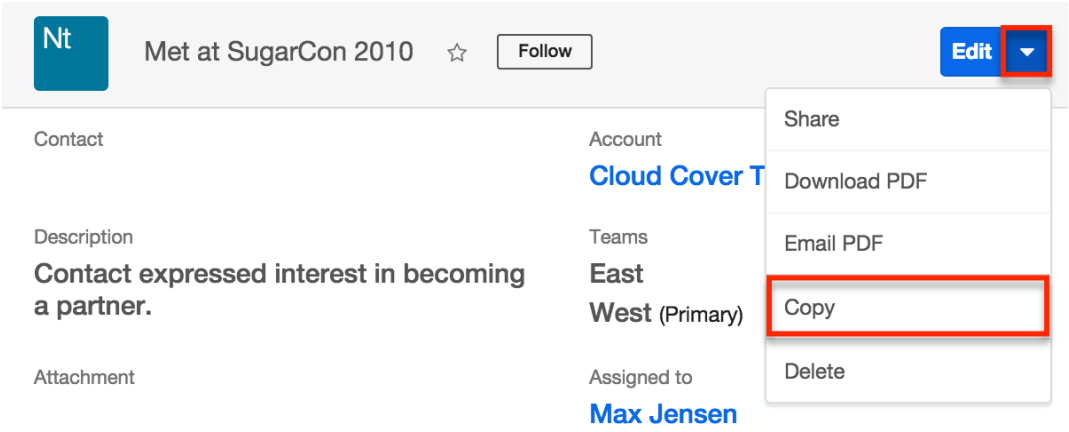
1. Open the quick create menu on the upper right of any Sugar page and select "Create Case" or select "Create" on any Cases subpanel on a related module's record view.
   Note: The quick create menu can be reconfigured by administrators via Admin > Configure Navigation Bar Quick Create. For more information on configuring layouts, please refer to the Configure Navigation Bar Quick Create documentation in the Administration guide.
   From quick create menu:
   
   
   From subpanel:
   
   
2. Enter appropriate values in the fields in the quick create form. All required fields are marked with a red asterisk and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".
   - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.



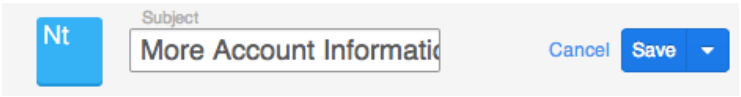

## Creating Via Duplication

You can also create a new note by duplicating an existing note record. The duplicate option is useful if the note you are creating has similar information to an existing note or if you would like to put the same note on a different account record.
Use the following steps to create a note by duplicating an existing record:

1. Navigate to a note record's record view.
2. Click the Actions menu and select "Duplicate".



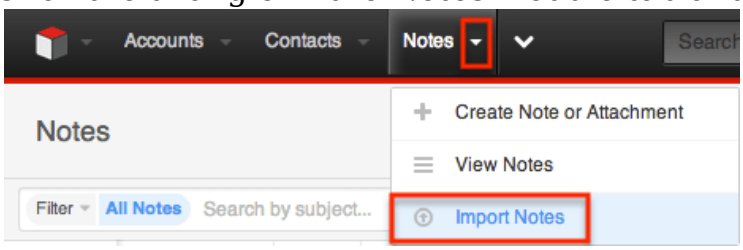

3. The displayed record view is pre-populated with the original note's values. Update the necessary fields, then click "Save".
   Note : When duplicating a note with an attachment, the attachment will also be on the new note created via duplication.
   - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.




## Importing Notes

The import function allows you to push multiple note records into Sugar using a comma (or other character) delimited file instead of creating them one-by-one. For more information on importing, please refer to the Import documentation.

Use the following steps to import notes via the Import Notes option:

1. Click the triangle in the Notes module tab and select "Import Notes".


2. In Step 1, select the source of the data you are importing. Click "Next".
3. In Step 2, select the import file and choose "Create new records only". Click "Next".
4. In Step 3, confirm the import file properties. Click "Next".
5. In Step 4, confirm the field mappings for the import. Click "Next".
6. In Step 6, view the import results.
    - The Created Records tab will show all of the new note records.
    - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
    - The Errors tab will show records that were not imported due to errors detected during import.

Note : You can not import attachments during this process, only note records themselves can be imported.

## Viewing Notes

There are various options available for viewing notes records in Sugar including via Notes list view, Notes record view, Notes Last Viewed menu, dashlets, and reports. Please note that you will only be able to see note records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

### Viewing Via List View

The Notes list view displays all note records meeting the current search criteria. Users can also access the activity stream to view posts specific to the contact record. For more information the Record View's Activity Stream, please refer to

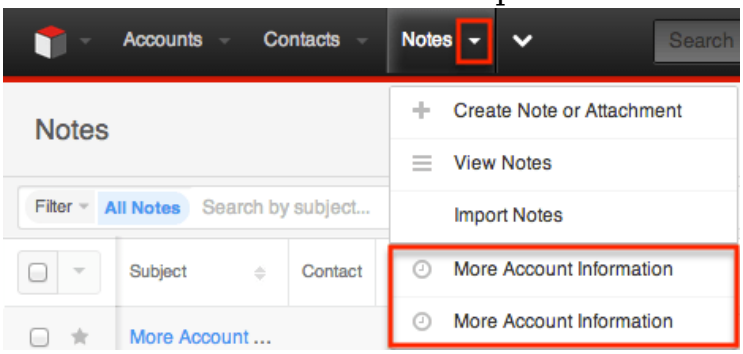
the Activity Stream section of this documentation. The Intelligence pane can also be viewed to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's sales, cases, activities, etc. For more information regarding the Record View's Intelligence Pane, please refer to the Intelligence Pane section of this documentation. To access the list view, simply click the Notes module tab. While list view shows key note fields, you can click the note's subject to open the record in record view. For more information on viewing notes via list view, please refer to the Notes List View section of this documentation.

## Viewing Via Record View

The Notes record view displays thorough contact information including all relevant contact fields followed by subpanels of the contact's related records belonging to various modules. Users can also access the activity stream to view posts specific to the contact record. For more information the Record View's Activity Stream, please refer to the Activity Stream section of this documentation. The Intelligence pane can also be viewed to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's sales, cases, activities, etc. For more information regarding the Record View's Intelligence Pane, please refer to the Intelligence Pane section of this documentation. The record view can be reached by clicking an contact record's link from anywhere in the application including from the Notes list view. For more information on viewing notes via the record view, please refer to the Notes Record View section of this documentation.

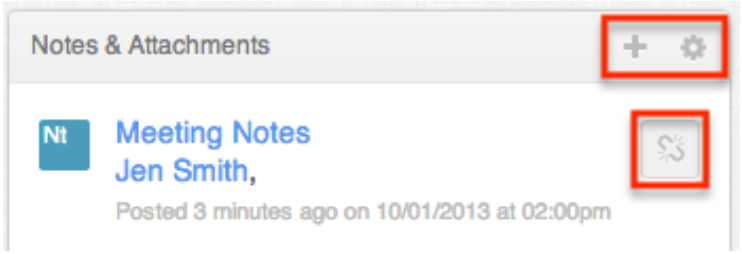
## Viewing Via Recently Viewed

As you work, Sugar will keep track of which notes you have recently viewed. Click the triangle in the Notes Module Tab to see a list of your most recently viewed notes and click each name to open the note in record view.



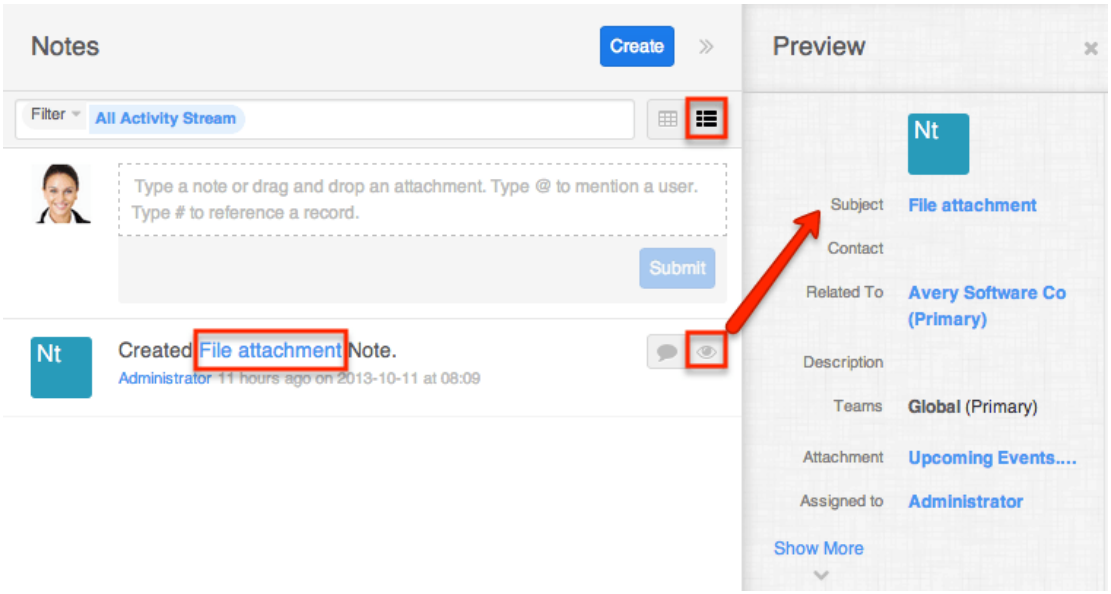

## Viewing Via Dashlets

Sugar Dashlets allow users to get a quick view of various records, activities, reports, etc. Dashlets may be added to a user's Home page or to the intelligence pane of any module. You can view note information in note-based dashlets such as "Notes & Attachments". Clicking a note's subject from any dashlet will open the note in record view. For more information on using dashlets and viewing note records via dashlets, please refer to the Intelligence Pane documentation.




## Viewing Via Activity Streams

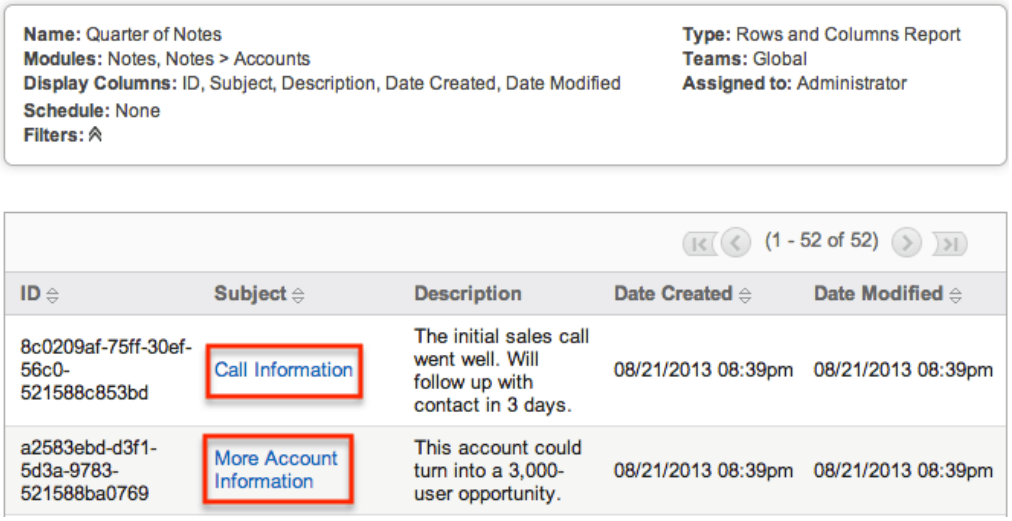
Activity stream allows users to view each other's activities in Sugar and the actions that took place for the various modules (e.g. Notes, etc.) via posts (record post, user post, etc). You can access the Notes record view by clicking the note's name referenced in the post. You can also preview the note record's detail directly from the activity stream by clicking the Preview button to the right of the post. For more information on viewing records via the activity stream, please refer to the Activity Streams Documentation.




## Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding notes and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex

filters to only display specific subsets of your records. Once the report is run, you will be able to view the note record's record view by clicking the note's subject in the report results. Please note that you can only directly access note record views with Rows and Columns-type and Summation with Records-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation.




Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

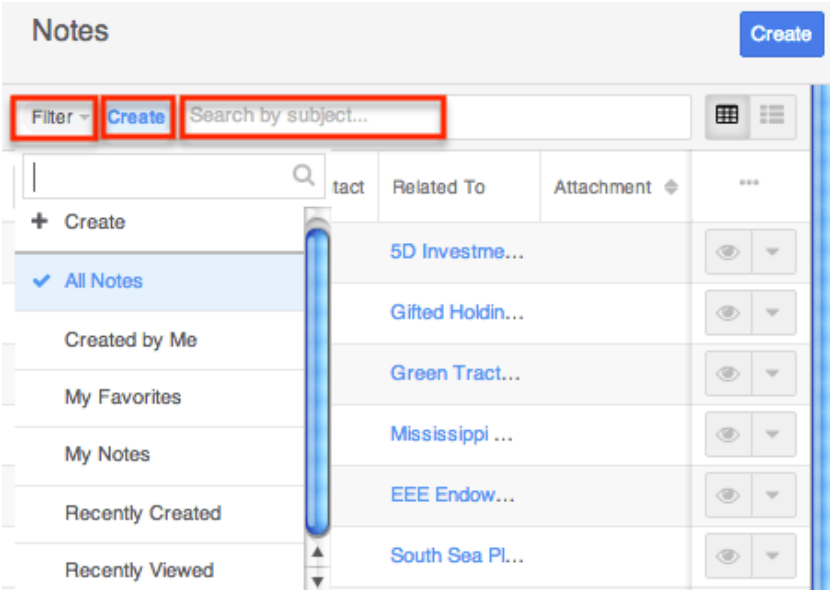
## Searching Notes

The Notes list view includes a Module Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Notes list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.
For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

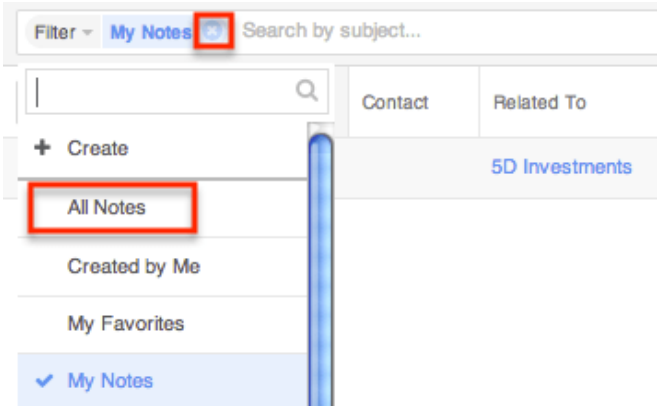
### Module Search

Module search enables users to easily search by note subject within the Notes module and pull up matching records in the list view. The search also provides a Filter option which can be used in combination with the open Search box to narrow your search further using the available options as follows:

- Create : Create a new custom filter which you can use to filter your search
  - Note: You can also click "Create" to the right of the Filter option.
- All Notes : Returns all records in the module to which you have access
- Created by Me :Returns all records in the module created by you
- My Favorites : Returns only records you have marked as favorites
- My Notes : Returns only records assigned to you
- Recently Created : Returns only records you created in the module within the last 7 days
- Recently Viewed : Returns only records you have viewed in the module within the last 7 days




When you choose a filter, Sugar will return notes which match both the selected filter and any subject provided in the "Search by subject..." bar in the filtered list view results. For example, if you select "My Notes" in the Filter options and enter a subject name, Sugar will only return subject records with a matching subject that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search bar. To see all note records to which you have access, simply select the All Notes option in the filter and remove any text from the search bar. You can also click the Clear icon within the selected filter option (e.g. My Notes) in the Search bar to clear the filter and pull up all list view search results. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away



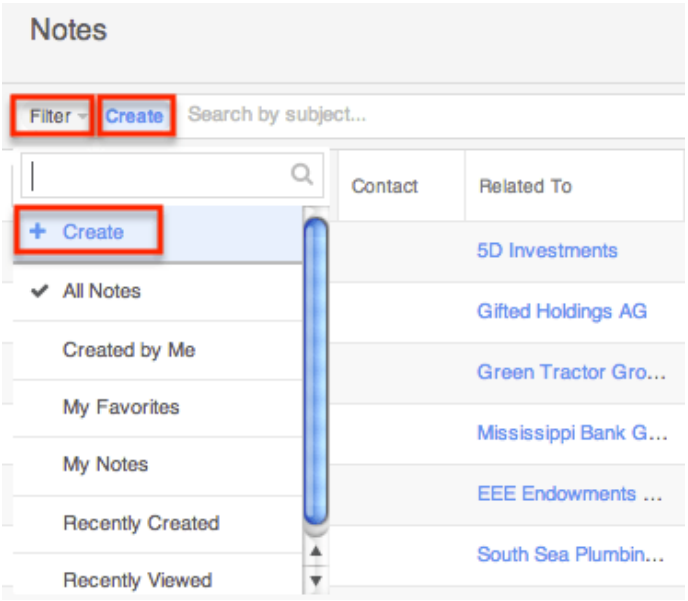

Please note that you will only be able to see note records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide. Administrators can configure what fields appear on the Accounts Module Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Create a Filter

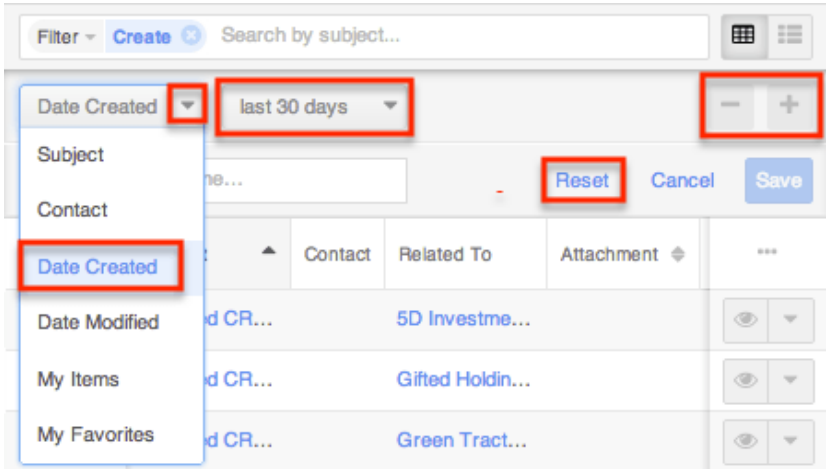
Users can also create new filters via the Create option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the Notes list view. You have the option to add multiple fields to your new filter by clicking the Plus button to the right of the filter selection dropdown lists. Please note that each one of the filter's criteria need to be true for a record in order for it to appear in the list view search result. When you run a search using a created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.

The following steps cover creating a new Date Created filter as an example:

1. Click the Filter option on the Notes search bar then select "Create".
    - You can also click "Create" to the right of the Filter option.




2. Select the field you wish to add to your filter as well as the condition and matching criteria.
    - Note: Only fields you have view access for will be available to add in the Filter list.
3. To add additional fields to the new filter, click the Plus button to the right of the filter.
    - To remove fields from the new filter, click the Minus button to the right of the filter.
    - To clear any filter values (e.g. last 30 days), simply click the "x" to the right of the value (if applicable) or select "Reset" to the left of the Save button



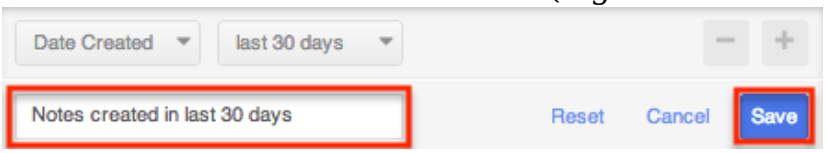

The list view will automatically display results matching your filters as you create and modify the criteria.

Saving a Filter

Saving a filter will preserve the chosen fields as well as the condition(s) of the

matching value(s). Additionally, it will allow users to easily select previously created and saved filters from the Filter dropdown list.

The following steps cover saving a new search by Name filter as an example:

1. Create a new filter to perform a search on your desired fields.
2. Enter in a name for the new filter (e.g. "Notes created in last 30 Days") .


3. Click "Save" to add this filter to the module's Filter dropdown list.

## Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search may be used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.




To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the Search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

# Notes List View

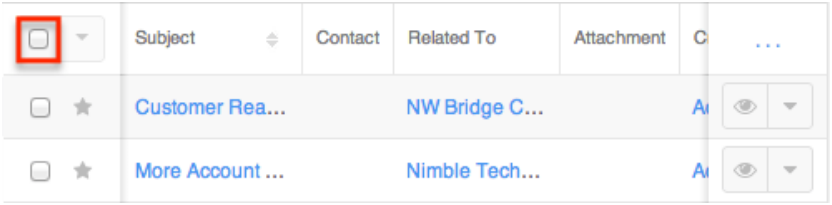
The Notes list view displays all note records meeting the current search criteria and to which your user has access. You can view the basic details of each note within the field columns. Please note that you will only be able to see note records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

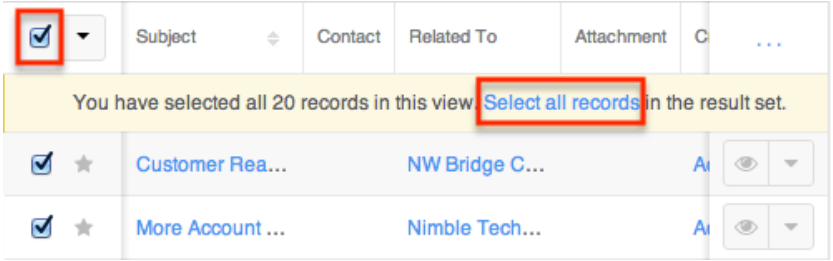
## Checkbox Selection

You can perform several actions on note records directly from the list view by first selecting the desired records. To select individual note records on the Notes list view, mark the checkbox on the left of each row. To select or deselect multiple note records on the list view, use the options in the checkbox dropdown menu:

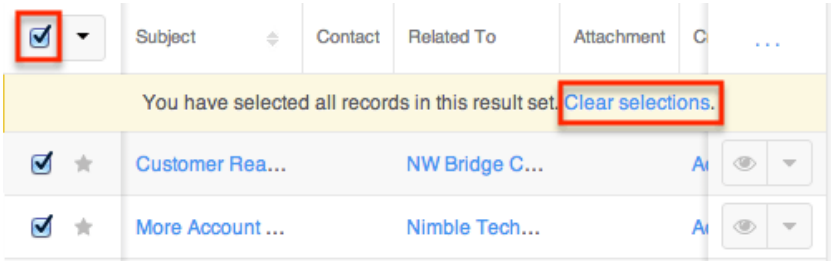
- Select This Page : Selects all records shown on the current page of note results.




- Select all records : Selects all records in the current search results across all pages of note results.

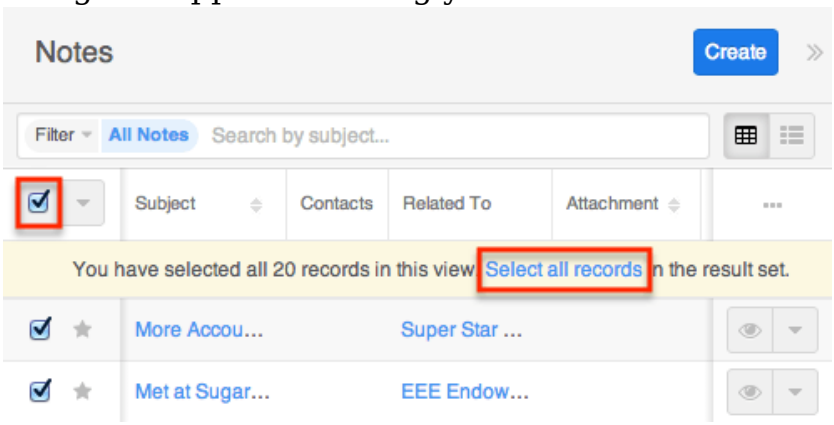



- Clear selections : Deselects all records that are currently selected.

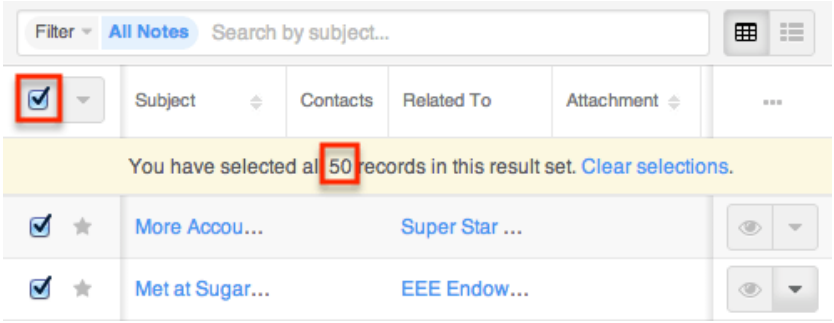


## Total Record Count

You can view the total record count on the Notes list view by selecting all records displayed on the current set of list view results. Once the records are selected, a dialog will appear allowing you to select all records in the results set.

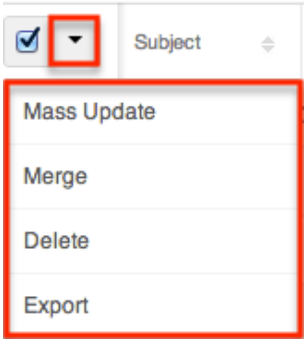



The total count of all records on the list view result set will appear in the dialog.




## Mass Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.



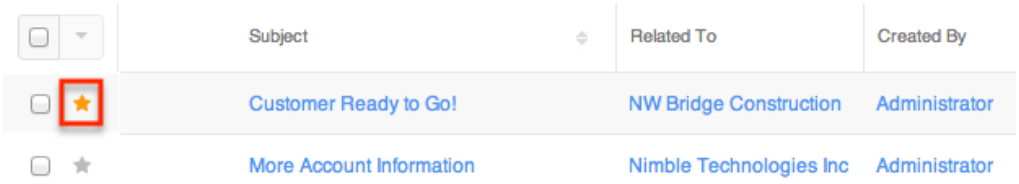

The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
| --- | --- |
| Mass Update | Mass update one or more notes at a |

| | |
|---|---|
| | time |
| Merge | Merge two or more duplicate notes |
| Delete | Delete one or more notes at a time |
| Export | Export one or more notes to a CSV file |
| Recalculate Values | (Available in certain circumstances) Updates calculated values to reflect changes to calculated fields made in Studio |

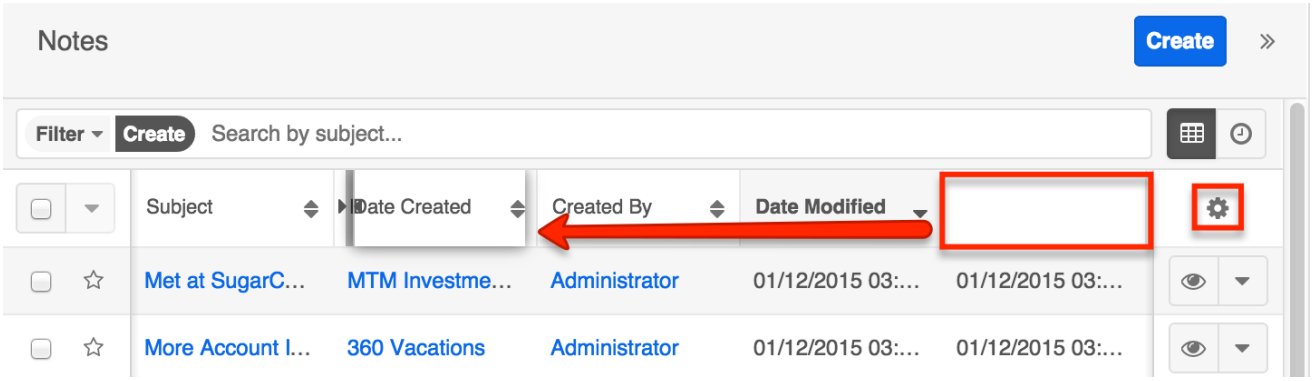
## Favorite Designation

Users have the option to mark note records as favorites via the list view as well as the record view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Notes module tab. In the Notes list view, the star on the left of each note's row is yellow once marked to indicate a favorite note. For more information on how to mark records as favorites, please refer to the Favoriting Notes section of this documentation.



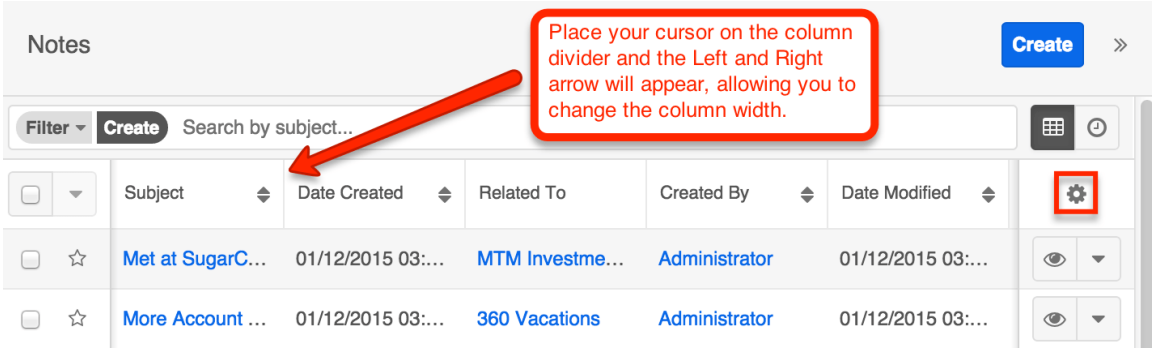

## Column Reordering

List view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the default column order.



## Column Resizing

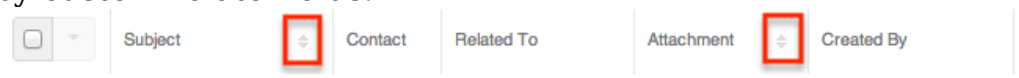
Users can easily adjust the size of columns in the Notes list view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the current list view is different from the default column width. Changes to the column width made by administrators in Studio are only respected if the user has not resized the specific column in the list view. The column size set by the user will supersede the default column width configured in Studio until the user resets the list view back to the default widths.




## Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows.

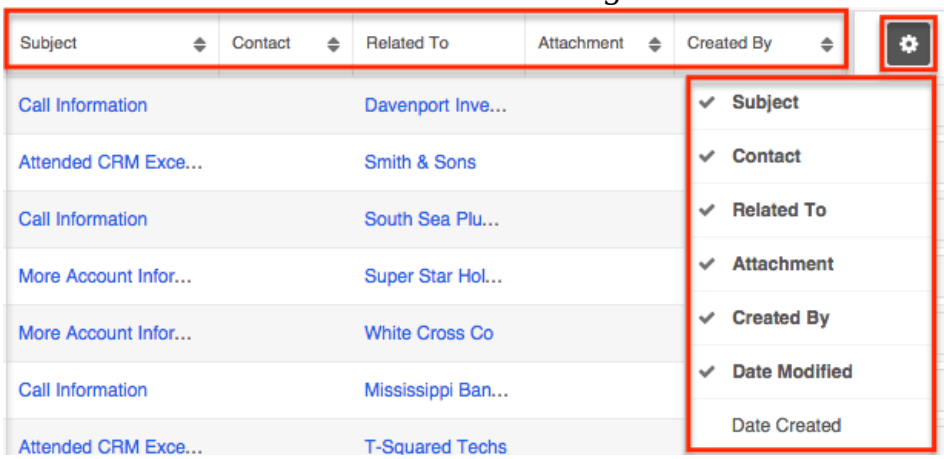
Note: List views may only be sorted by one column at a time and cannot be sorted by custom relate fields.




## Column Selection

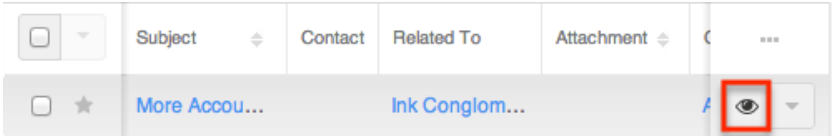
Sugar gives users the ability to personalize the list view by specifying which fields they want to be displayed in the list view. You can click the Column Selection icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column on your list

view. Please note that administrators have the ability to configure what fields are available to display in the list view via Admin > Studio. For more information on configuring fields to display in the list view, please refer to the Studio documentation in the Administration guide.

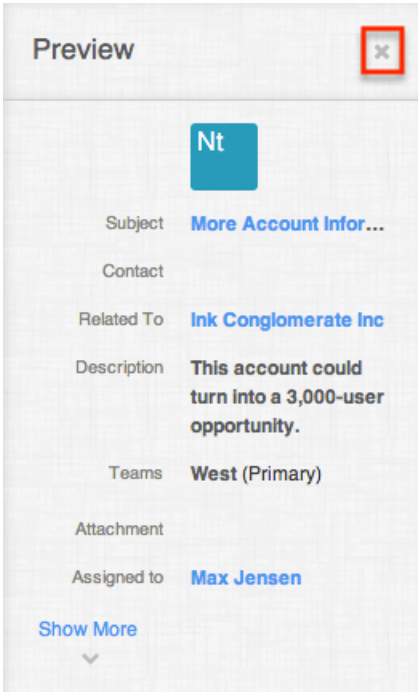



## Preview

Users can view a record's details directly from the Notes list view by clicking the Preview icon to the far right of each note's row.

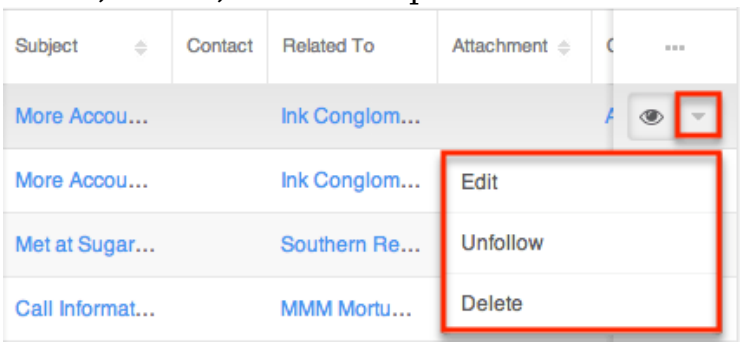



The record's data will display to the right of the list view providing key information regarding the record as well as the related activity stream information. On the upper right of the preview pane, there is a Left and Right arrow button that allows you to scroll through the list view's current search results by previewing the next or previous record. To close the preview, simply click the "X" on the upper right of the preview pane.




## Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to edit, follow, or delete specific records directly from the list view.

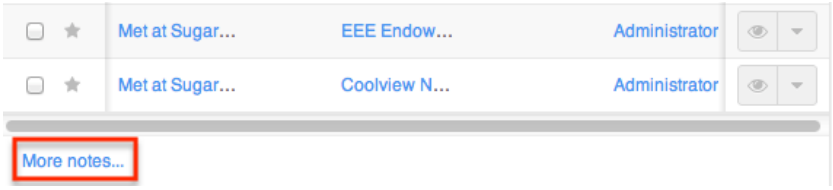



The options in the Record Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this note |
| Follow | Follow / Unfollow this note |
| Delete | Delete this note |

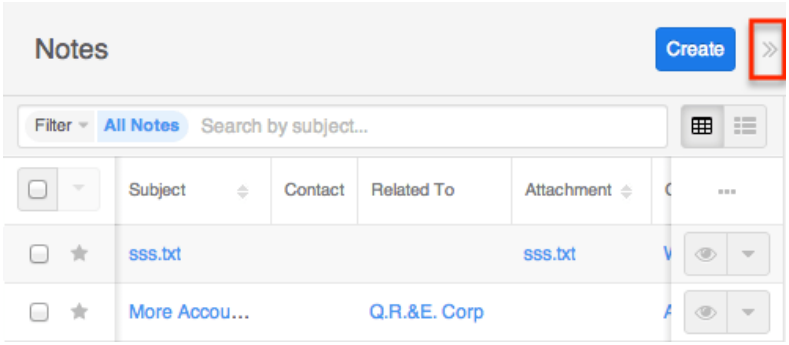
## More Notes

The list view loads an initial number of records meeting the current search criteria with the option to show additional results at the user's request. By default, Sugar displays 20 records per list view results set, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide. To load the next set of list view results, simply click the More Notes link at the bottom of the list view.



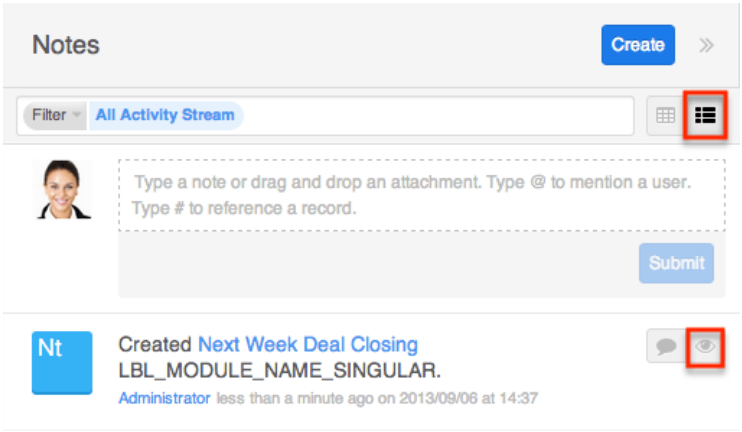

## Right Hand Side Drawer

On the upper right of the Notes list view there is a Double arrow icon which allows users to expand the list view to the full screen width. The intelligence pane to the right of the list view will be hidden when the list view is expanded. To reduce the list view's width and reveal the intelligence pane, simply click the Double arrow icon again.




## Activity Stream

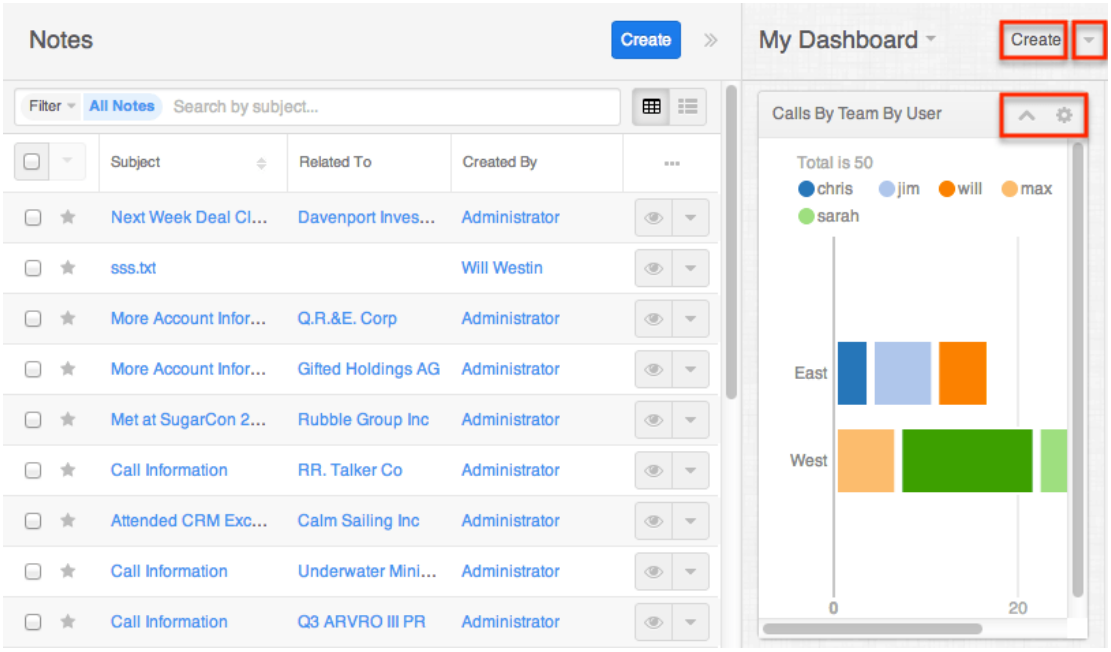
The Note module's activity stream displays user posts made on the Notes module and record posts relevant to an account record. To view the module's activity stream, simply click the Activity Stream button to the right of the list view's search bar. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts using the comment button to the far right of each post. You can also preview the record referenced in record posts by clicking the Preview button to the right of each post. The activity stream can be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box and selecting the desired message type.




## Intelligence Pane

An intelligence pane displays to the right of the Notes list view and provides users with valuable record information via various dashlets. The Help dashboard normally displays by default along with the List View Help dashlet and Learning Resources dashlet. The List View Help dashlet provides users with a brief introduction to the module along with a link (e.g. Notes documentation) to the corresponding documentation in the Application guide. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may create other dashboards for use with the Notes module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets (e.g. My Contacts, etc.) to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do no wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Notes module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.

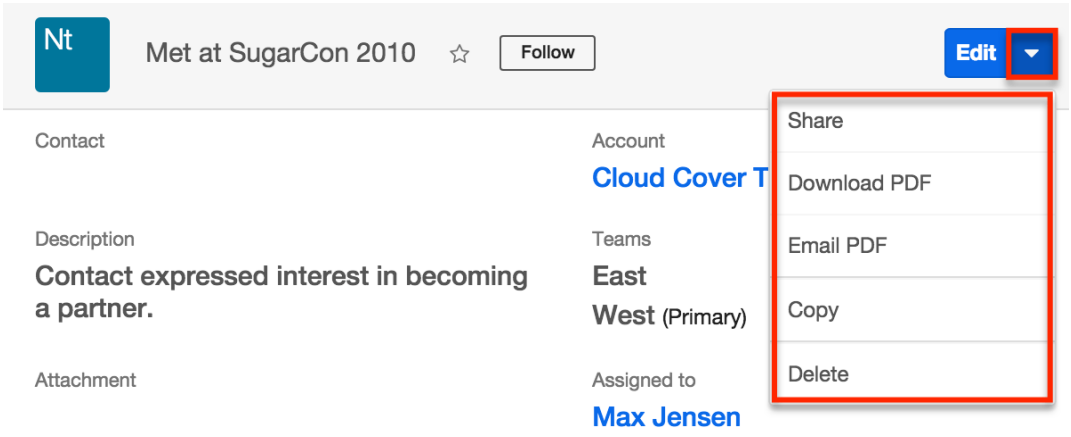



# Notes Record View

The Notes record view displays thorough note information including all note fields which are grouped by default into the Overview and Other panels. The record view can be reached by clicking a note record's link from anywhere in the application including from the Notes list view.
Please note that you will only be able to view a note record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Managementand Role Management documentation in the Administration guide. Users with administrator or developer access have the ability to change the record view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Actions Menu

The Actions menu on the top right of each note's record view allows you to perform various actions on the current record.

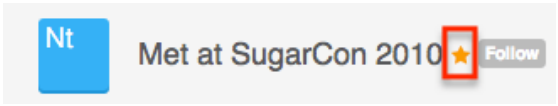



The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this note |
| Share | Share a link to this note via email |
| Download PDF | Download note information as a PDF file |
| Email PDF | Email note information as a PDF attachment |
| Copy | Duplicate this note |
| Delete | Delete this note |

## Favorite Designation

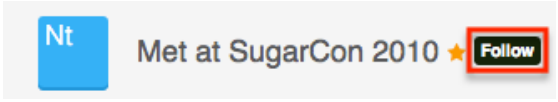
Users have the option to mark note records as a favorite via the record view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Notes module tab. In the Notes record view, the star on the right of the note's subject is yellow once marked to indicate a favorite note. For more information on how to mark records as favorites, please refer to the Favoriting Notes section of this documentation.




## Following Designation

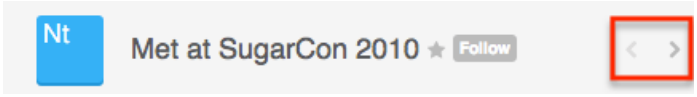
Users also have the option to follow note records via the record view or list view. This allows users to view record posts from followed notes on their Home page and Notes list view activity streams. Each user can personalize their activity stream by

viewing posts for records that are most important to them. From the record view, users may follow or unfollow notes to which they have access using the Follow button to the right of the note's name. For more information on how to mark records to follow via the list view, please refer to the Record Actions Menu section of this documentation. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. If you wish to stop following a specific note record, click the Following button to revert it to gray. Should a user lose access to a record in Sugar, they will automatically stop following that record.



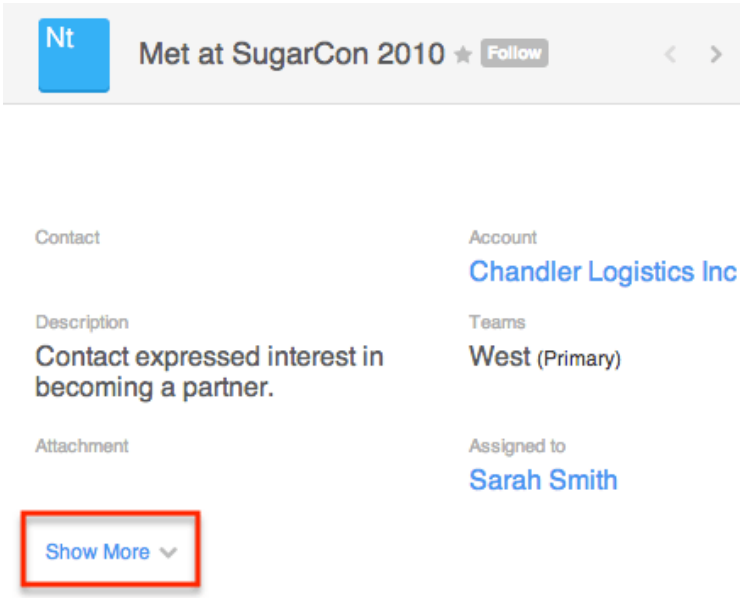

## Next or Previous Record

On the upper right of the Notes record view, there are two buttons that allow you to page through each note in the Notes list view's current search results. Clicking the Previous button displays the previous note of the current search results while clicking the Next button displays the next note of the current search results. The text in between shows which note result you are currently viewing within the total number of current results.



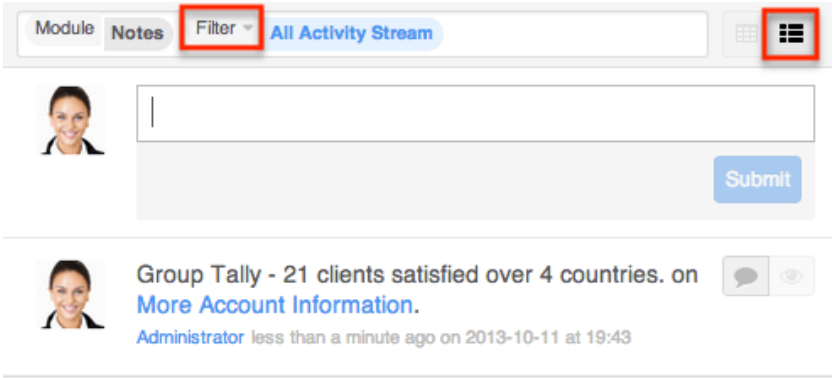

## Show More

The Note's record view typically display a few key fields (e.g. subject, contact, description, etc.) on the business card panel with the option to view more fields by clicking the Show More link on the bottom left. Please note that administrators can configure what fields appear on the business card panel via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.




## Activity Stream

Record view's activity stream displays user posts and record posts specific to the individual note record. Users can view all posts in the record view's activity stream even if they do not follow the record in Sugar. Please note that you must follow the record if you wish to view the record view posts via the Home page or List View activity stream. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts by clicking the Comment button to the far right of each post, entering in your comment, then clicking "Reply". You can also preview the record referenced in the record post by clicking the Preview button. The activity stream can also be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box then selecting the desired message type.

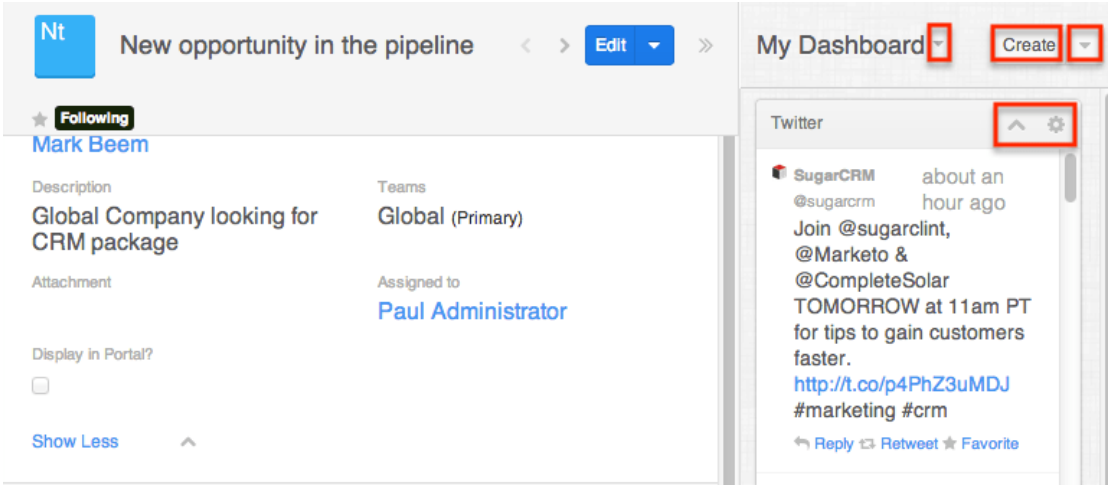



## Intelligence Pane

An intelligence pane displays to the right of the note's record view and provides

users with valuable information specific to the note. The Help Dashboard normally displays by default along with the Record View Help dashlet and Learning Resources dashlet. The Record View Help dashlet provides users with a brief introduction to the module along with some instructions to help users utilize and navigate around the record view. A link to the corresponding documentation (e.g. Notes documentation) in the Application guide is also provided within the Help dashlet. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard, which will display some stock dashlets (e.g. Planned Activities dashlet, History dashlet, etc.) by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may choose to view any of their dashboards using the triangle to the right of the current dashboard's name and may create other dashboards for use with the Notes module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do not wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Notes module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.




## Editing Notes

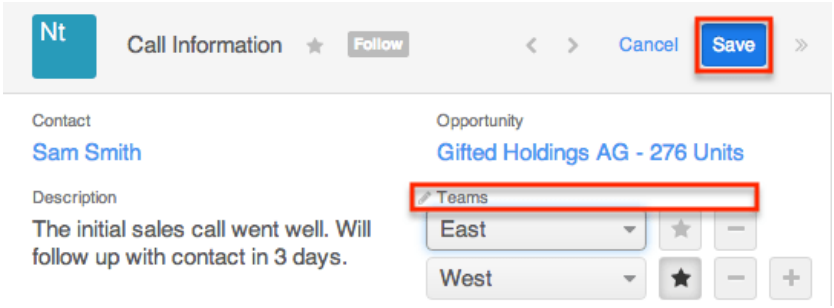
Notes may be edited at any time to update or add information to the record. You can make changes to existing note records via the Notes record view and quick create forms. Record view is available within the Notes module and includes all of

the Note fields you should need.
Please note that your ability to edit notes in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure both the Notes record view and quick create via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

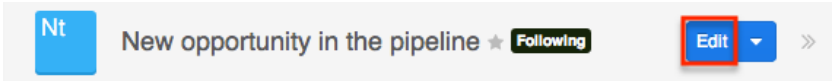
## Editing Inline Via Record View

Users can edit individual fields on a note's record view without entering the full edit mode by clicking the field name. Fields which are available for inline editing will display a pencil icon when hovering on the field name or value. This will allow users to type or select a new value. Click "Save" to preserve the changes made to the field.

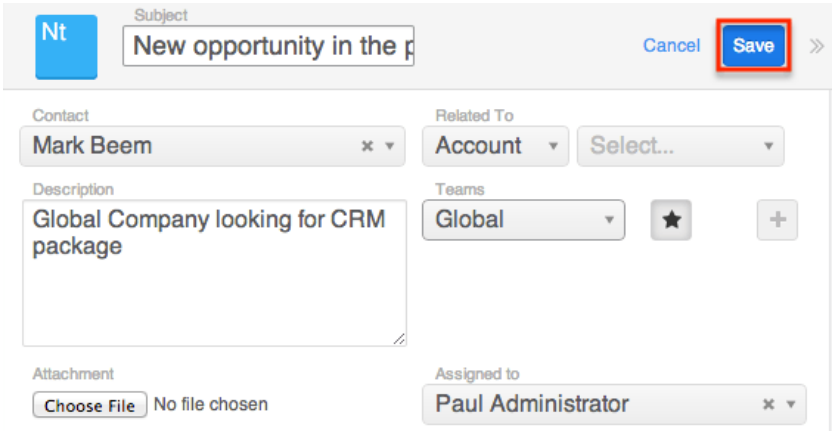



## Editing Via Record View

You can edit notes via the record view by clicking the Edit button on the upper left of the page.

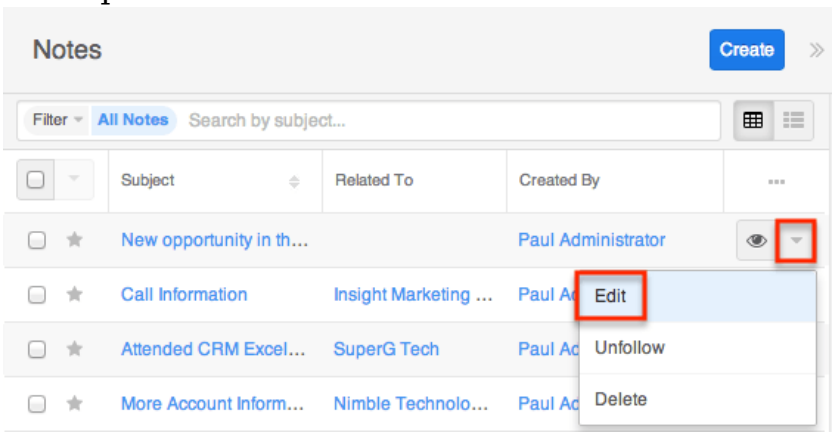



Once the record view layout is open, update the necessary fields, then click "Save" to preserve the changes made.

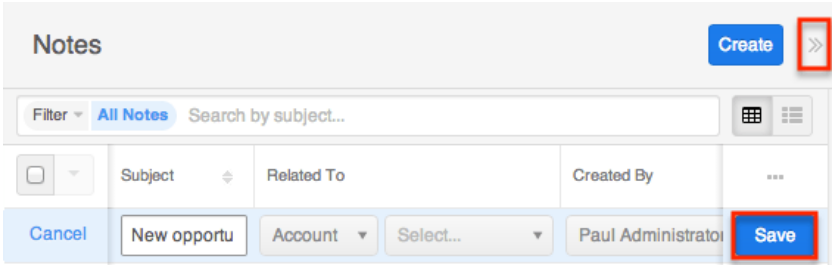



## Editing Inline Via List View

You can edit notes via the list view by clicking the triangle icon to the right of each note's preview and choose "Edit".




The note will become editable, inline as a shortened version of the record view layout. Click the double arrows to the right of the "Create" button to expand the editing window. Update the necessary fields, then click "Save" to preserve the changes.




Note: Text area fields are not inline editable from list views.

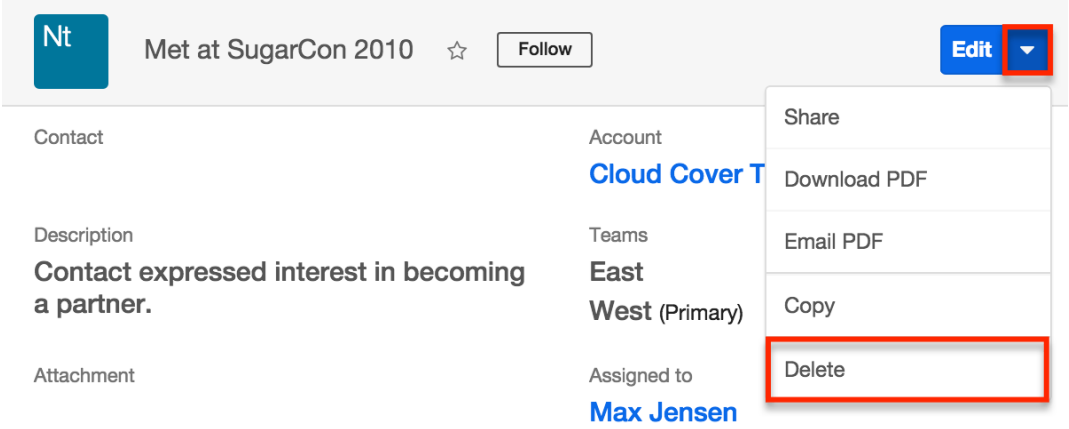
# Deleting Notes

If a note record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Notes record view or list view. Deleting via the record view allows you to delete a single record while the list view allows for mass deleting multiple records at once.
Please note that your ability to delete notes in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

## Deleting Via Record View

Use the following steps to delete a note record via the record view:

1. Navigate to a note record's record view.
2. Select "Delete" from the Actions menu.

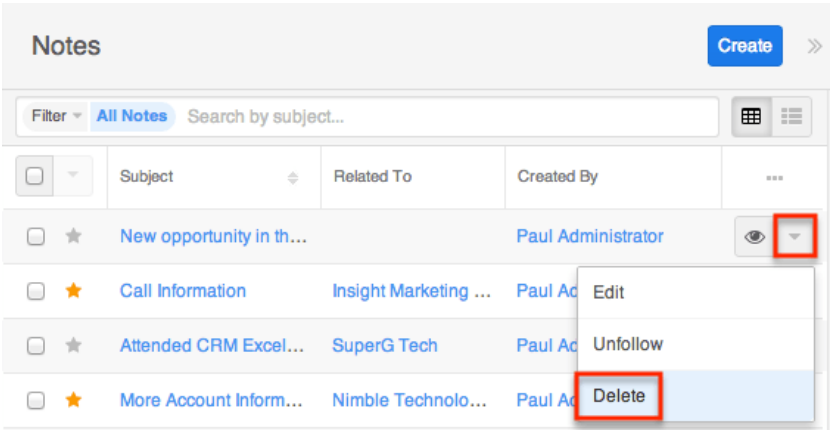



3. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

## Deleting Via List View

Use the following steps to delete a specific notes via the list view:

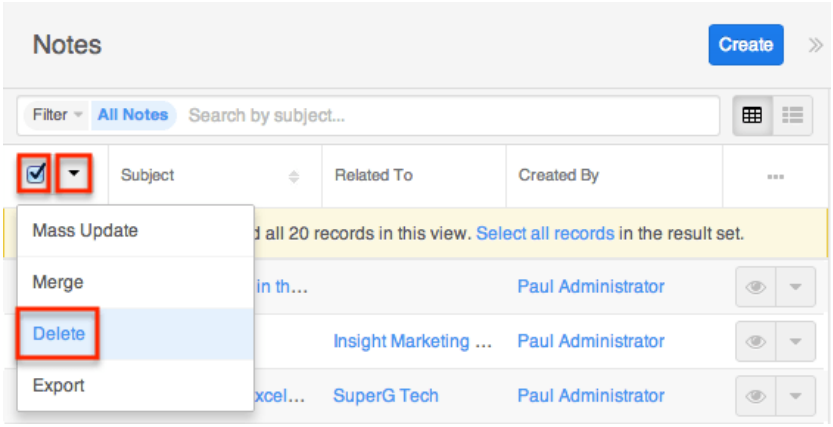
1. Navigate to the Notes list view by clicking the Notes module tab.
2. Use the Module Search to find the Note records you wish to delete.
3. Click the triangle to the right of the preview button of the note you want to delete.




## Mass Deleting Via List View

Use the following steps to delete one or more note records via the list view:

1. Navigate to the Notes list view by clicking the Notes module tab.
2. Use the Module Search to find the Note records you wish to delete.
3. Select the desired note records individually or using the Checkbox Dropdown'soptions.
4. Choose "Delete" from the Actions menu.




5. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

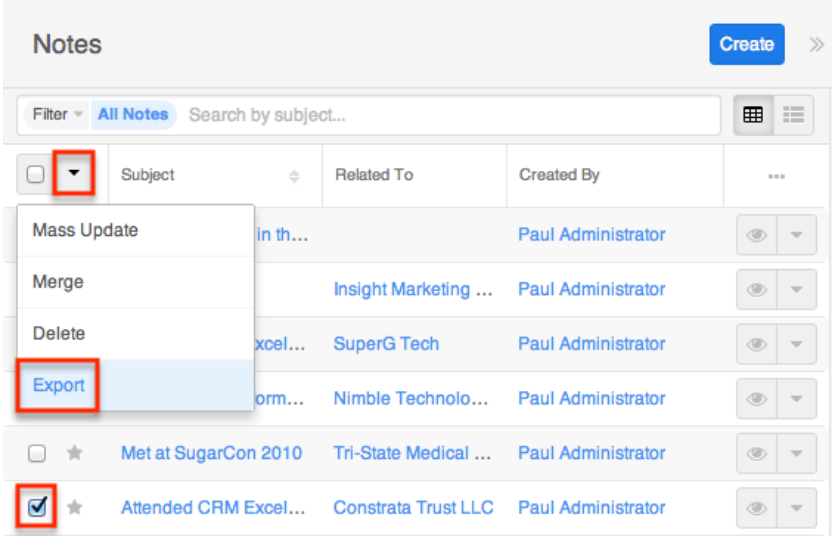
You can also use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to delete more than 1000 records or delete a specific group of records on the list view, please use the in module search to perform the deletions in smaller batches.

# Exporting Notes

Sugar's Export option allows users to download all fields for the selected notes to

their computers as a .CSV (comma-separated values) file. This may be useful when needing to use note data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered notes back into Sugar. For more information on updating existing records via import, please refer to the Import documentation.

Notes may be exported from the Notes list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for notes and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of note records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.




Please note that your ability to export notes from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

## Mass Updating Notes

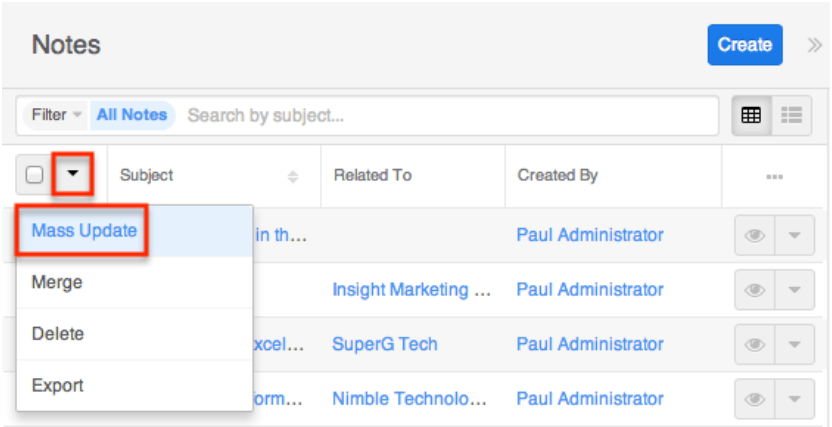
Mass Updating allows users to make the same change to multiple note records at once from the Notes list view. Users with administrator or developer level access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide.You can use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to

update more than 1000 records or update a specific group of records on the list view, please use the filter option in module search to perform the updates in smaller batches.

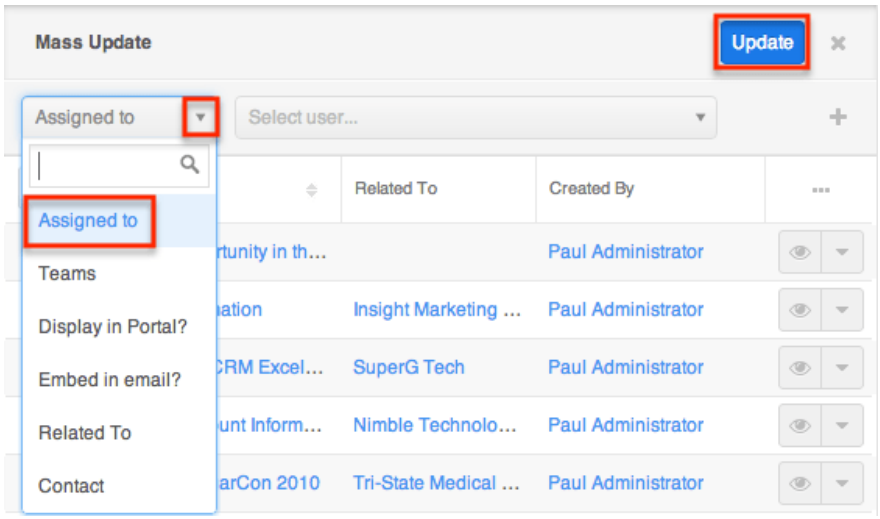
Please note that your ability to mass update notes may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

Use the following steps to mass update note records from the list view:

1. Navigate to the Notes list view by clicking the Notes module tab.
2. Use the Module Search to identify Note records you wish to modify.
3. Select the desired notes individually or using the checkbox dropdown's options then choose "Mass Update" from the Actions menu.




4. The Mass Update panel will appear below the search bar. Set values for the field(s) you wish to alter.
    - To add additional fields for mass update, click the Plus icon to the right of the dropdown list.
    - Note: For the Teams field, mark "Append Team(s)" to add the teams specified here to any existing team assignments. Not marking the checkbox will replace the existing team assignment with the new one.




5. Click "Update" to save the changes to all of the currently selected note records.

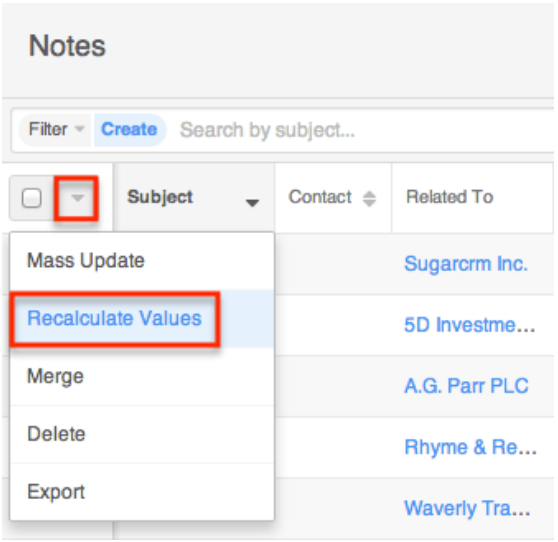
## Recalculating Calculated Values

This feature allows calculated values to be recalculated following the addition or alteration of a calculated field in Studio. For more information on calculated fields, please refer to the Studio documentation in the Administration guide. Sugar allows you to select up to 1000 records at a time for recalculating values. If you desire to recalculate values for more than 1000 records, you will need to perform the recalculation in several batches.

Note: This action will not appear unless the user is an Admin or has developer-level access to the module and if there is at least one calculated value in that module. Please note that your ability to recalculate values may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Recalculate Values option.

The following steps cover recalculating values for records from the Notes list view as an example:

1. Navigate to the Notes list view by clicking the Notes module tab.
2. Use the list view's Module Search to identify notes you wish to update.
3. Select the desired notes then choose "Recalculate Values" from the Actions menu.




# Merging Notes

When duplicate records are identified in Sugar, you have the option to merge two or more notes into a single record. Once the merge is complete, the duplicate note record(s) will be deleted, and the primary record will remain. Please note that all relationships belonging to the duplicate notes will be merged to the primary record meaning that any calls, meetings, contacts, etc. related to the duplicate note record(s) will automatically be related to the resulting, merged note record.

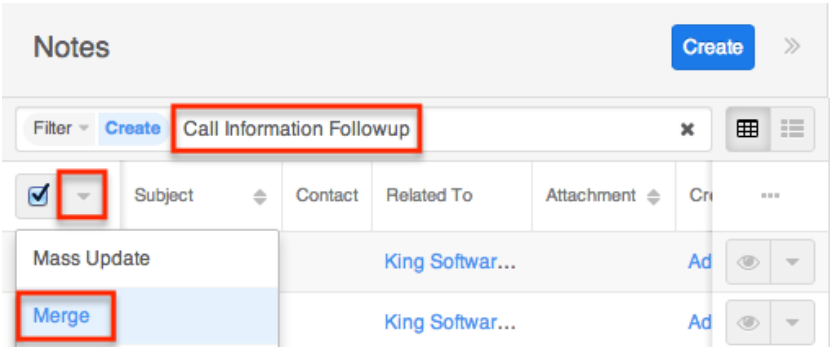
Note: Date Created, Date Modified, and Password field types are not supported when merging duplicate records in Sugar.

## Merging Via List View

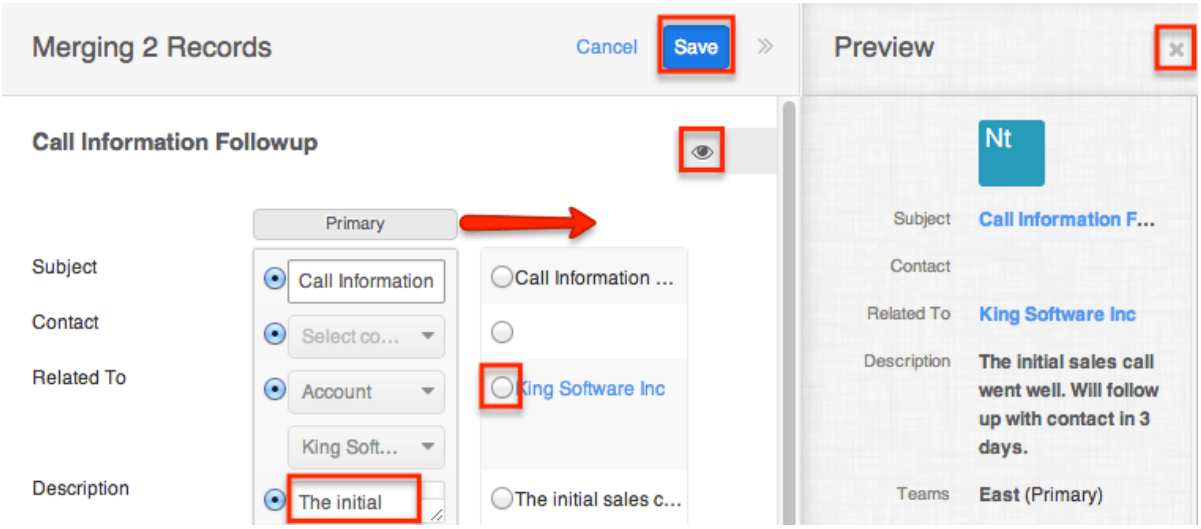
Module Search may be used to identify duplicate notes by, for example, searching for notes with similar names or related accounts. Once your search has identified duplicate notes, you can merge them directly from the Notes list view.

Use the following steps to merge notes via the list view:

1. Use the Module Search to identify duplicate notes.
2. Possible duplicates will be displayed in the list view. Select the duplicate record(s) that you wish to merge.
    - Please note that up to five records may be merged at once in Sugar. An error message ("Invalid number of records passed. The valid range is from 2 to 5 records.") will appear if more than five records are selected when attempting to perform a merge.




3. Select "Merge" from the Actions menu to display the Merging Records page. The primary record's field values are displayed on the left while other record's values are in columns to the right. For convenience, fields with differing values will appear on the top of the list. Saving the merge will preserve only the field values marked with the radio button into a single record.




4. To change which record is considered the primary, drag and drop the Primary label on the top of a different column.
5. Review the field values in each column and click the radio button to the left of the value that should appear on the final record. You can also manually type or select a new value for any field as necessary.
    - Note: Fields you do not have Edit access for cannot be edited on the merging records page.
6. Preview what the final, merged record will contain as you work by clicking the eye icon to display the preview in the Intelligence Pane.
7. Click "Save" once all fields you wish to appear on the single, merged record have their radio buttons selected.
8. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Confirm" to proceed.

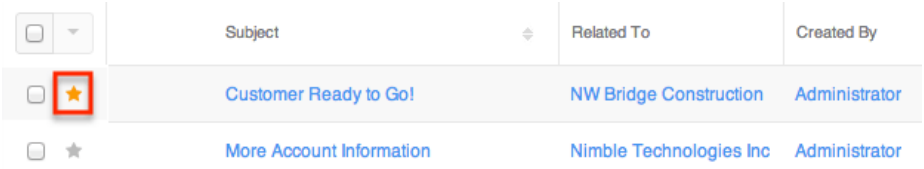
## Favoriting Notes

Each Sugar user has the option to designate their own favorite notes which are important or will be viewed often so that they can easily be accessed via search or from the Notes module tab. Once records are marked as favorites, use the My Favorites checkbox in the Notes Module Search to retrieve your favorites or select from your most recent favorites directly from the Notes Module Tab .

## Favoriting Via List View

Use the following steps to mark records as favorites via the Notes list view:

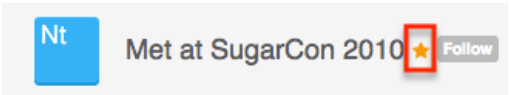
1. Navigate to the Notes list view by clicking the Notes module tab.
2. Use the Module Search to find the Note records you wish to mark as favorites.
3. Mark the star icon on the left of each desired note's row.
4. To remove the note as a favorite, click the star again to revert it to white.




## Favoriting Via Record View

Use the following steps to mark records as favorites via the Notes record view:

1. Navigate to a note record's record view.
2. Click the star icon to the right of the note's subject in the upper left of the record view to designate it as a favorite.
3. To remove the note as a favorite, click the star again to revert it to white.

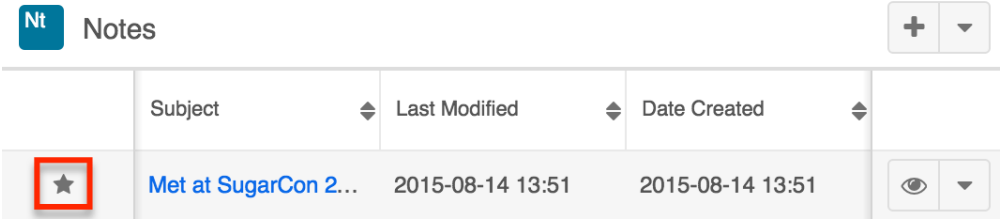



## Favoriting Via Subpanel

Use the following steps to mark note records as favorites via the subpanel in related modules:

1. Navigate to a related module's record view.
2. Click the star icon to the left of the desired record's row in the Notes

subpanel.




3. To remove the note as a favorite, click the star again to revert it to white.

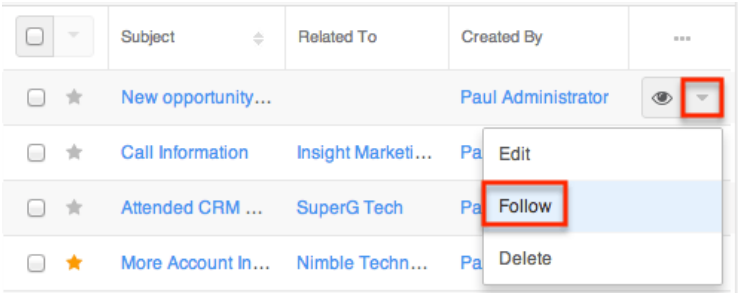
## Following Notes

Users can also choose to follow specific note records to which they have access to in Sugar by clicking the Follow button (If grayed out) to the right of the note's name. This allows each user to personalize their activity streams by specifying which records' posts should appear on the activity stream displayed on their Home page and Notes list view. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. Should a user lose access to a record in Sugar, they will automatically stop following that record.

### Following Via List View

Use the following steps to mark a record to follow via the Note's list view:

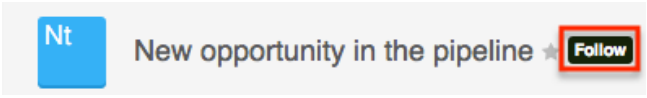
1. Navigate to the Note's list view by clicking the Bugs module tab.
2. Use the Module Search to find the Note records you wish to follow.
3. Click the Record Actions menu to the far right of the records row and select "Follow".



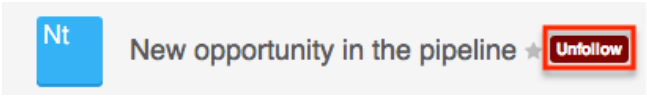

### Following Via Record View

Use the following steps to mark a record to follow via the Note's record view:

1. Navigate to a Note's record view.
2. Click the Follow button to the right of the Note's name.

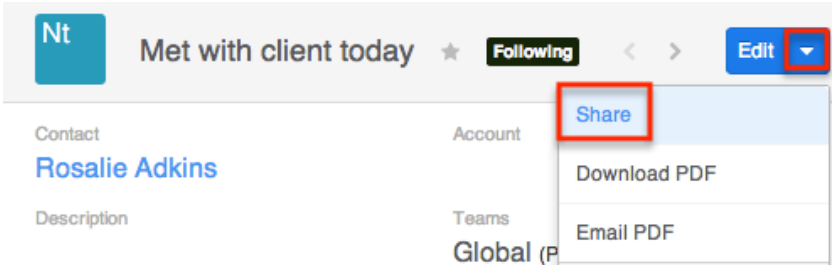



3. To unfollow the note, click the Follow button again to revert it to gray.




## Sharing Notes

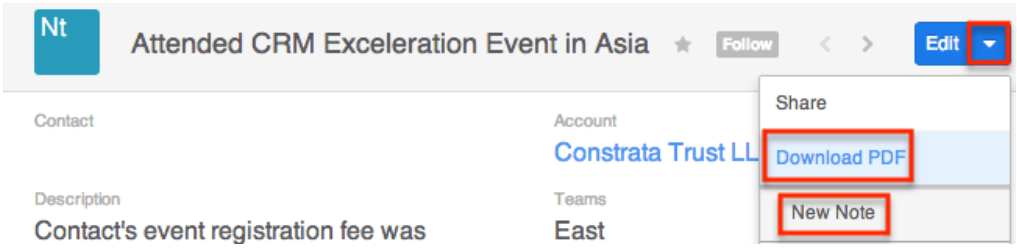
Individual Note records can be shared with other users in your organization by sending an email with the record's link directly from the record view. In the note's record view, select "Share" from the Actions menu which will open a Compose Email window including the URL of the note record. Enter the recipient(s) email address in the To field then click "Send".




Users can simply click the link in the email to access the note record in Sugar. Please note that the user must be logged into Sugar in order to access the record. Users will only be able to view the shared record as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

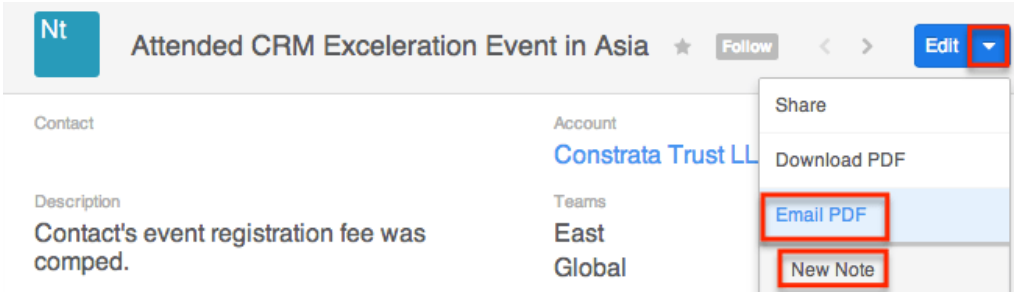
## Downloading Note Information as a PDF

Users have the option to download note information as a PDF file via the Notes record view by clicking the Actions menu and selecting "Download PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Download PDF option in the Actions menu. Simply select one of the templates to generate the PDF file to view or save onto your local machine. Please note that the Download PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.

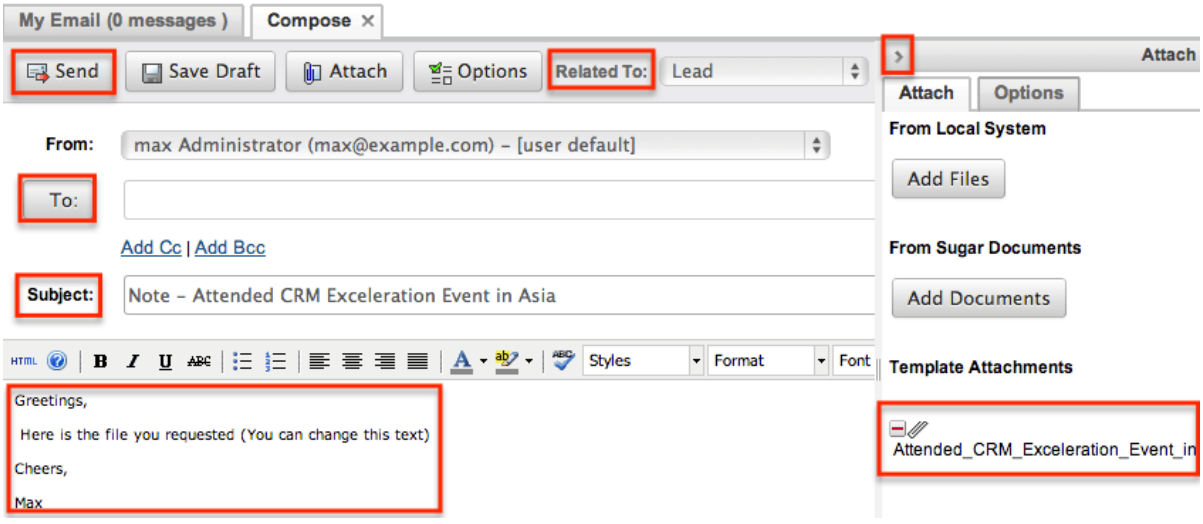



## Emailing Note Information as a PDF

Users also have the option to email note information as a PDF file using any of the available Notes module templates using Sugar's email client. Simply click the Actions menu and select "Email PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Email PDF option in the Actions menu.




Select one of the templates to open a Compose window in the Emails module. The email's To field will automatically populate with the email address of the note record, and the Subject field will display the note's name. The email is automatically related to the note record, and the chosen note PDF will be attached. You can update the fields as necessary and enter a body for the email message then click "Send". For more information on sending emails via the Emails module, please refer to the Emails documentation.




Please note that the Email PDF option will only appear in the Actions menu if there

is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.

Last Modified: 12/21/2015 06:23pm

# Targets

## Overview

Sugar's Targets module consists of individual people who are unqualified prospects that you have some information on, but is not yet a qualified lead. Information (e.g. name, email address) regarding these targets are normally acquired from business cards you receive while attending various trades shows, conferences, etc. Targets in Sugar are stand-alone records as they are not related to contacts, leads, accounts, or opportunities. There are various ways you can create targets in Sugar such as via the Targets module, importing targets, etc. Once the target record is created, you can view and edit information pertaining to the target via the Targets Record view. This documentation will cover the basics of the Targets module as well as the various options available in performing the actions related to the module.

## Target Fields

The Targets module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

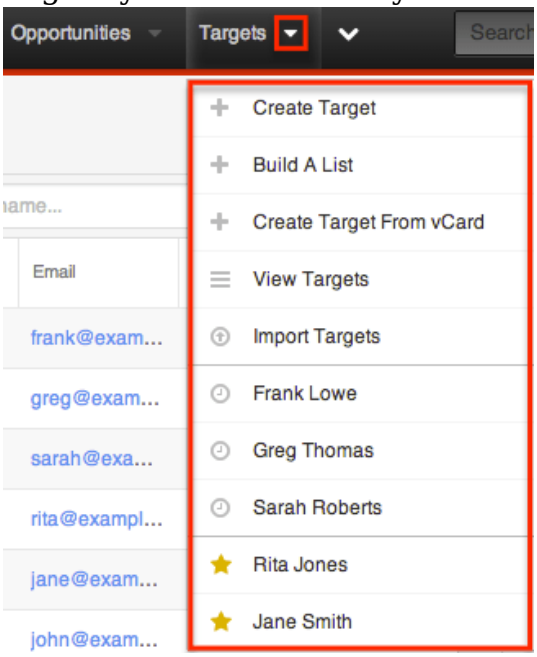
| Field | Description |
|---|---|
| Account Name | The account to which the target belongs |
| Alternate Address | The target's alternate address (e.g. billing or shipping) |
| Assigned To | The Sugar user assigned to the target |
| Assistant | The name of the target's assistant within his or her company |
| Assistant Phone | The assistant's phone number |

| | |
|---|---|
| Birthdate | The target's date of birth |
| Date Created | The date the target record was created |
| Date Modified | The date the target record was last modified |
| Department | The target's department within their company |
| Description | A description or other information about the target |
| Do Not Call | Indication that the target should not be called |
| Email Address | The target's email address |
| Email Opt Out | Indication that the target has opted out of receiving emails |
| Fax | The target's fax number |
| First Name | The target's first name |
| Home | The target's residence number |
| Last Name | The target's last name |
| Mobile | The target's mobile number |
| Name | When viewing, the target's full name |
| Office Phone | The target's office number |
| Other Phone | The target's alternate phone number |
| Primary Address | The target's primary address |
| Salutation | Standard greeting for the target (e.g. Mr., Ms., Mrs., etc.) |
| Teams | The Sugar team(s) assigned to the target record |
| Title | The target's business title |

## Targets Module Tab

The Targets module tab is typically located under the More tab of the navigation bar at the top of any Sugar screen. Sugar normally displays the top six modules shown in the Display Modules list of your user preferences, so the remaining displayed modules are grouped under the More tab. For more information on displayed modules for the navigation bar, please refer to the User Preferences section of the Getting Started documentation. Click the tab to access the Targets list view. You may also click the triangle in the Targets tab to display the Actions,

Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of targets you last viewed in the module. The Favorites Menu displays the list of targets you most recently marked as favorites in the module.




The options in the Actions menu allow you to perform the following types of action:

| Menu Item | Description |
|---|---|
| Create Target | Opens the record view layout to create a new target |
| Build A List | Opens the D&B Build A List Page to create a list of individuals for import based on various search filter criteria<br><br>Note: D&B connector must be enabled via Admin > Connectors in order to utilize the Build A List page. |
| Create Target From vCard | Opens the record view layout and populates fields from a vCard |
| View Targets | Opens the list view layout to search and display targets |
| Import Targets | Opens the import wizard to create or update targets using external data |

If you do not see the Targets module tab in Sugar, please check the following:

- The Targets module may be marked as hidden in your user preferences which

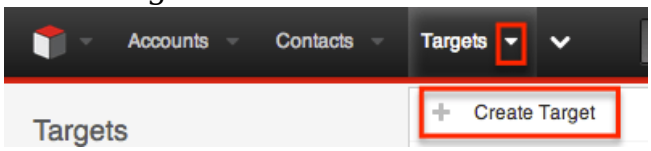
will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Targets module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Targets module for your entire Sugar instance. Reach out to your Sugar administrator to have the Targets module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

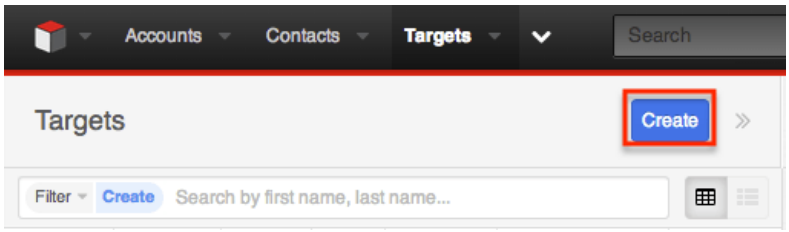
## Creating Targets

There are various methods for creating targets in Sugar including via the Targets module, quick create, duplication, and importing targets. The full record view layout opens when creating the target directly from the Targets menu and includes all of the relevant fields for your organization's targets. The quick create form is a shortened version of the targets record view and typically contains fewer fields. Both the Record View and Quick Create layouts can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

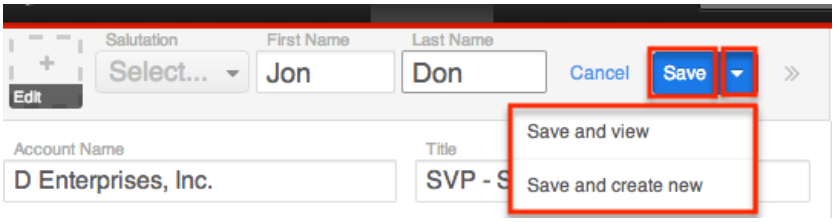
### Creating Via Targets Module

One of the most common methods of target creation is via the Create Target option in the Targets module tab. This opens up the record view layout which allows you to enter in all the relevant information for the target.
Use the following steps to create a target via the Targets module:

1. Click the triangle in the Targets module tab to open the actions menu and select "Create Target". You can also click the Create button on the upper right of the Targets list view.
   From Targets module tab:
   
   
   From Targets list view:




2. Enter appropriate values for the fields in the record view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".
    - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.



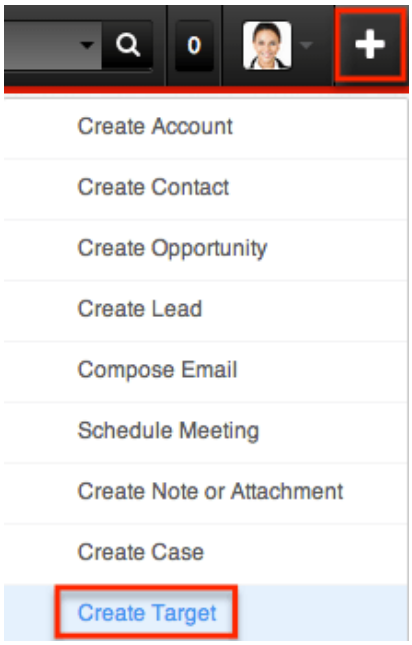

## Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also quick create a target from any Targets subpanel on related module records.

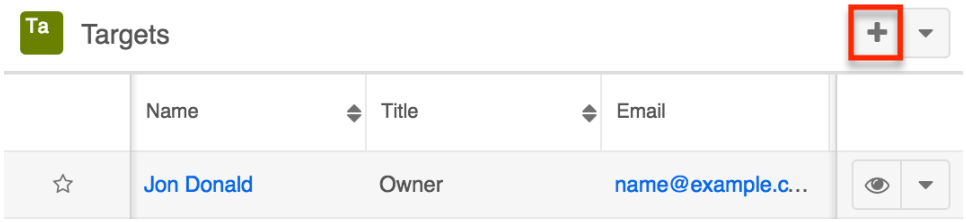
Please note that the Targets module may not be available in the Quick Create menu as it could be disabled for quick create. Reach out to your Sugar administrator to have the Targets module enabled for quick create via Admin > Configure Navigation Bar Quick Create. For more information on enabling and disabling modules for the Quick Create menu, please refer to the Developer Tools documentation.

Use the following steps to create a target via Quick Create:

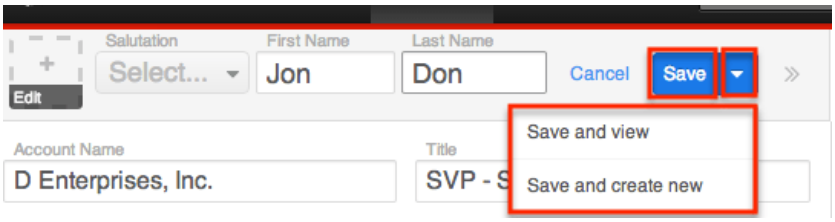
1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Target" or select "Create" on any Targets subpanel on a related module's record view.
   From Quick Create menu:




From subpanel:



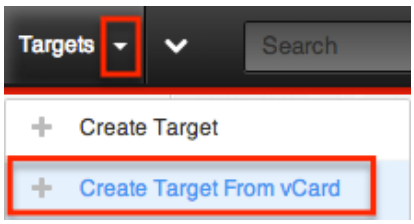

2. Enter appropriate values in the fields in the quick create form. All required fields are marked with a red asterisk and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".
    - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.



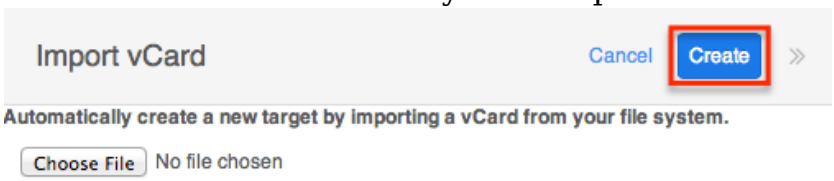

## Creating Via vCard

vCards are electronic business cards that are exchanged between applications such as email and web browsers. Targets can be generated from a vCard.
Use the following steps to create a target in Sugar via vCard:

1. Click the triangle in the Targets module and select "Create Target From vCard".




2. Choose the vCard file from your computer and click "Create".

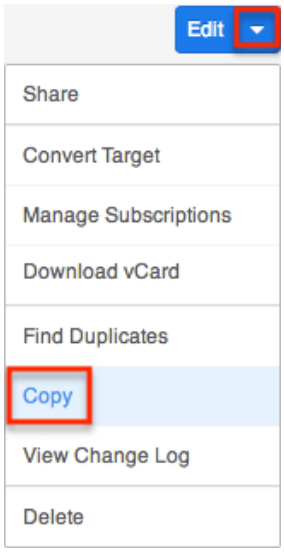



## Creating Via Duplication

You can also create a new target by duplicating an existing target record. The copy option is useful if the target you are creating has similar information to an existing target.

Use the following steps to create a target by duplicating an existing record:

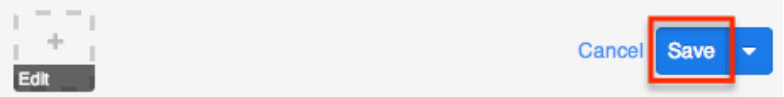
1. Navigate to a target record's record view.
2. Click the Actions menu and select "Copy".




3. The displayed record view is pre-populated with the original target's values. Update the necessary fields, then click "Save".

- Alternatively, you can use the Actions Menu to the right of the Save button to

select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.

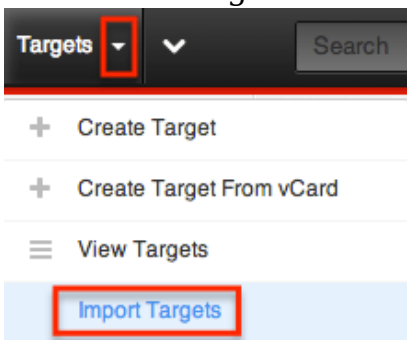



## Importing Targets

The import function allows you to push multiple target records into Sugar using a comma (or other character) delimited file instead of creating them one-by-one. For more information on importing, please refer to the Import documentation.

Use the following steps to import targets via the Import Targets option:

1. Click the triangle in the Targets module tab and select "Import Targets".




2. In Step 1, select the source of the data you are importing. Click "Next".
3. In Step 2, select the import file and choose "Create new records only". Click "Next".
4. In Step 3, confirm the import file properties. Click "Next".
5. In Step 4, confirm the field mappings for the import. Click "Next".
6. In Step 6, view the import results.
    - The Created Records tab will show all of the new target records.
    - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
    - The Errors tab will show records that were not imported due to errors detected during import.

# Viewing Targets

There are various options available for viewing target records in Sugar including via Targets list view, Targets record view, Targets Recently Viewed menu,

dashlets, and reports. Please note that you will only be able to see target records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

## Viewing Via List View

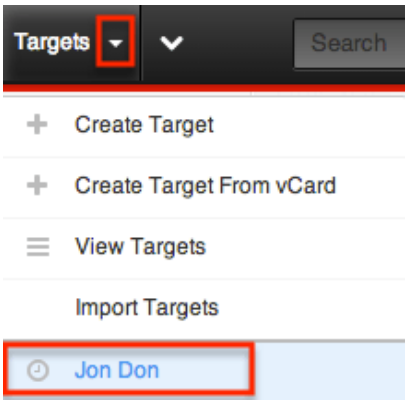
The Targets list view displays all target records meeting the current search criteria. The Intelligence pane can also be viewed to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's sales, cases, activities, etc. For more information regarding the Record View's Intelligence Pane, please refer to the Intelligence Pane section of this documentation. To access the list view, simply click the Targets module tab. While list view shows key target fields, you can click the target's name to open the record in record view. For more information on viewing targets via list view, please refer to the Targets List View section of this documentation.

## Viewing Via Record View

The Targets record view displays thorough target information including all relevant target fields followed by subpanels of the target's related records belonging to various modules. The Intelligence pane can also be viewed to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's sales, cases, activities, etc. For more information regarding the Record View's Intelligence Pane, please refer to the Intelligence Pane section of this documentation. The record view can be reached by clicking an target record's link from anywhere in the application including from the Targets list view. For more information on viewing targets via the record view, please refer to the Targets Record View section of this documentation.

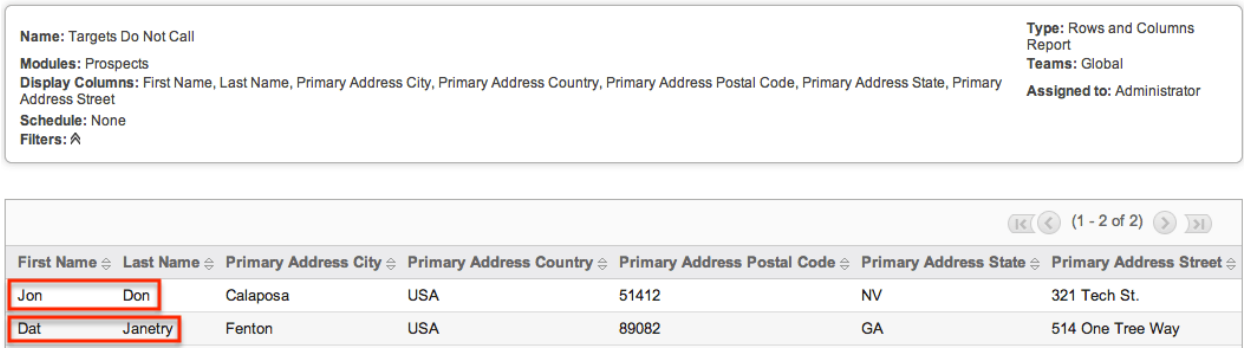
## Viewing Via Recently Viewed

As you work, Sugar will keep track of which targets you have recently viewed. Click the triangle in the Targets module tab to see a list of your most recently viewed targets and click each name to open the target in record view.




## Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding targets and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the target record's record view by clicking the target's name in the report results. Please note that you can only directly access target record views with Rows and Columns-type and Summation with Records-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation.




Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide.Check with your system administrator if you cannot access the Reports module.

# Searching Targets

The Targets list view includes a module search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Targets list view below. Global Search

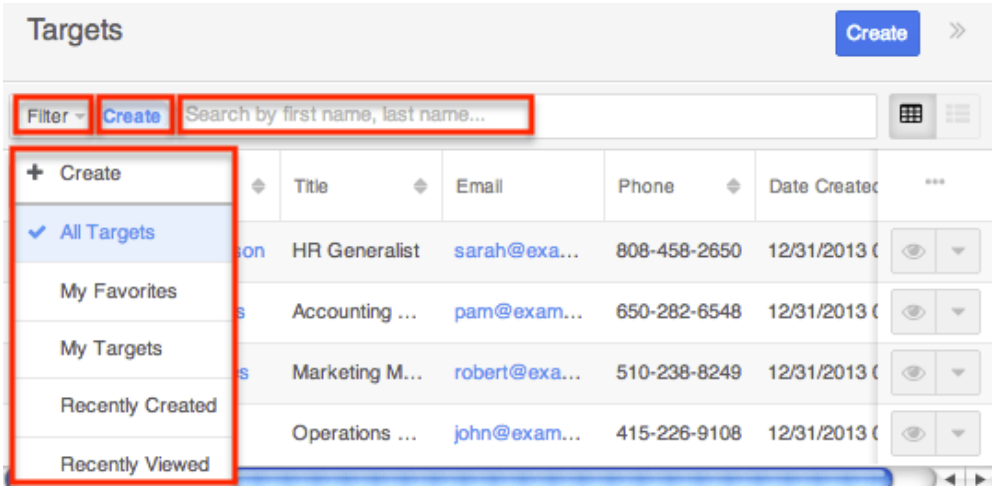
allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %smith). This will pull up any record that has the word "smith" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

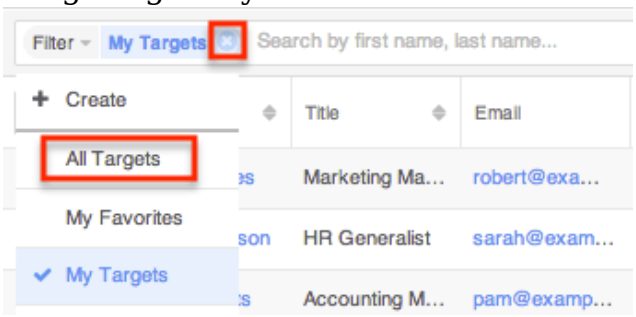
## Module Search

Module search enables users to easily search by target name within the Targets module and pull up matching records in the list view. Records are deemed as matching when their first or last names start with any of the terms entered in the open Search box. The search also provides a Filter option which can be used in combination with the open Search box to narrow your search further using the available options as follows:

- Create : Create a new custom filter which you can use to filter your search
  - Note: You can also click "Create" to the right of the Filter option.
- All Targets : Returns all records in the module to which you have access
- My Favorites : Returns only records you have marked as favorites
- My Targets : Returns only records assigned to you
- Recently Created : Returns only records you created in the module within the last 7 days
- Recently Viewed : Returns only records you have viewed in the module within the last 7 days



When you choose a filter, Sugar will return targets which match both the selected filter and any name provided in the "Search by first name, last name..." bar in the filtered list view results. For example, if you select "My Targets" in the Filter options and enter a target name, Sugar will only return target records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search bar. To see all target records to which you have access, simply select the All Targets option in the filter and remove any text from the search bar. You can also click the Clear icon within the selected filter option (e.g. My Targets) in the Search bar to clear the filter and pull up all list view search results. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.




Please note that you will only be able to see target records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Administrators can configure what fields appear on the Targets Module Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Creating a Filter

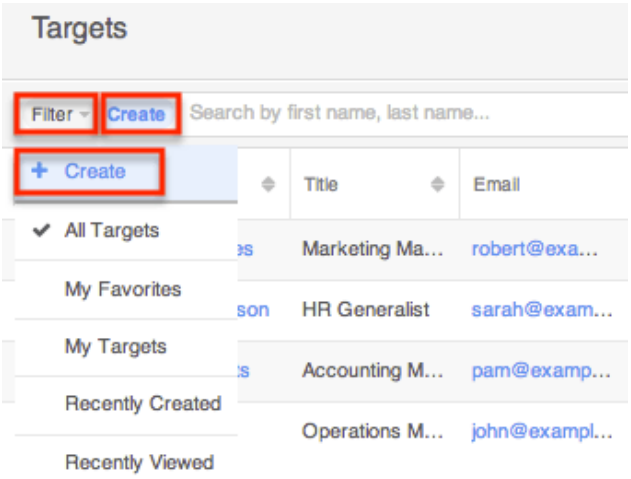
Users can also create new filters via the Create option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the Targets list view. You have the option to add multiple fields to your new filter by clicking the Plus button to the right of the filter selection dropdown lists and set select operators along with their value(s). A filter's criteria need to be true for a record in order for it to appear in the list view search result. Additionally, filters with no specified values may be saved as a custom filter to act as a filter template when a user often searches using the same fields but with varying values. Please note that only fields you have view access for will appear in the Filter list when creating a search filter.

When you run a search using a created filter, the search will be preserved when

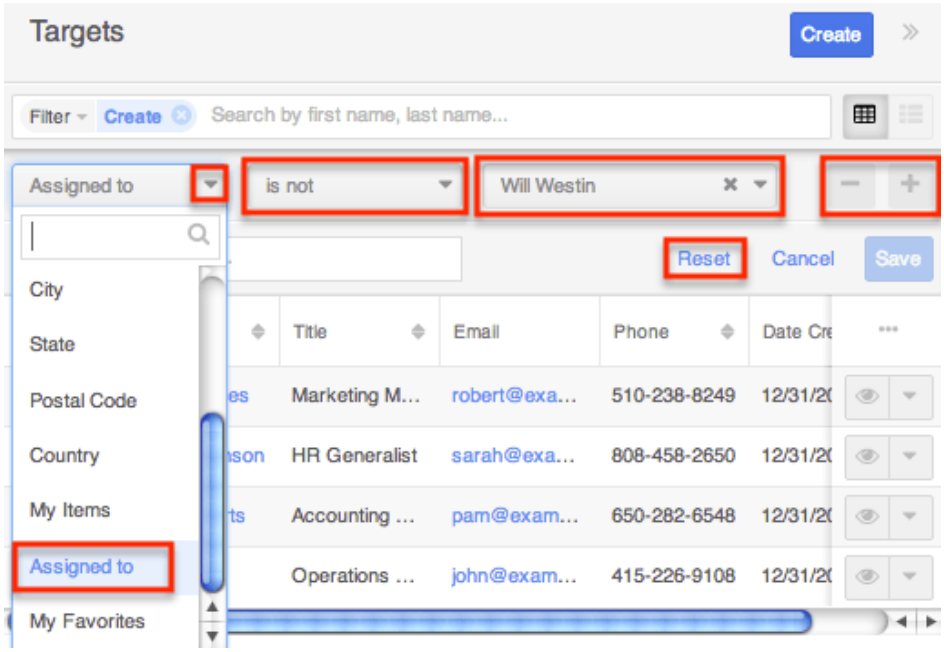
you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.

The following steps cover creating a new Assigned to filter as an example:

1. Click the Filter option on the Targets search bar then select "Create".
    - You can also click "Create" to the right of the Filter option.




2. Select the field you wish to add to your filter as well as the condition and matching criteria.
    - Note: Only fields you have view access for will be available to add in the Filter list.
3. To add additional fields to the new filter, click the Plus button to the right of the filter.
    - To remove fields from the new filter, click the Minus button to the right of the filter.
    - To clear any filter values (e.g. Will Westin), simply click the "x" to the right of the value or select "Reset" to the left of the Save button.



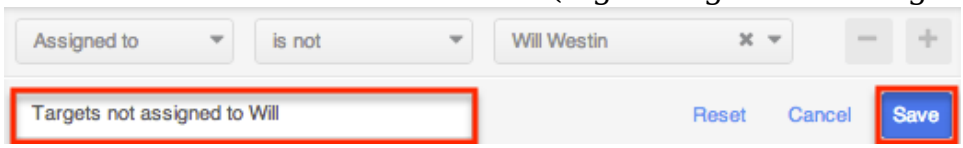

The list view will automatically display results matching your filters as you create and modify the criteria.

### Saving a Filter

Saving a filter will preserve the chosen fields as well as the condition(s) of the matching value(s). Additionally, it will allow users to easily select previously created and saved filters from the Filter options.

The following steps cover saving a new search by Name filter as an example:

1. Create a new filter to perform a search on your desired fields.
2. Enter in a name for the new filter (e.g. "Targets not assigned to Will").




3. Click "Save" to add this filter to the module's Filter options.

## Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search may be used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the

magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.




To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the Search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

## Targets List View

The Targets list view displays all target records meeting the current search criteria to which your user has access. You can view the basic details of each target within the field columns. Please note that you will only be able to see target records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

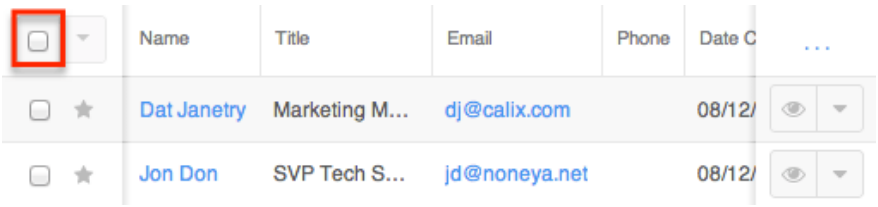
Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

### Checkbox Selection

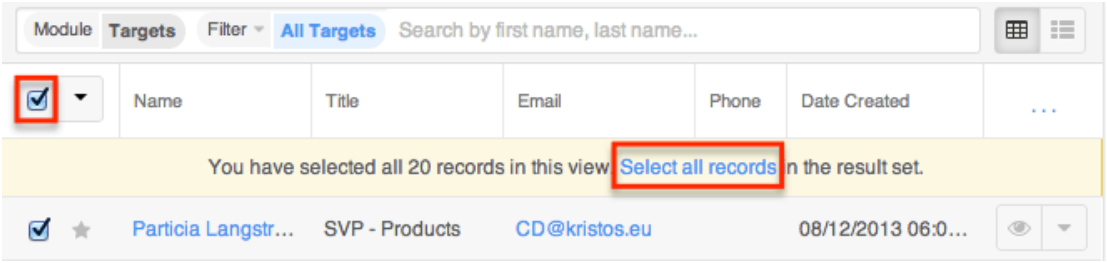
You can perform several actions on target records directly from the list view by first selecting the desired records. To select individual target records on the Targets list view, mark the checkbox on the left of each row. To select or deselect multiple target records on the list view, use the options in the checkbox dropdown

menu.

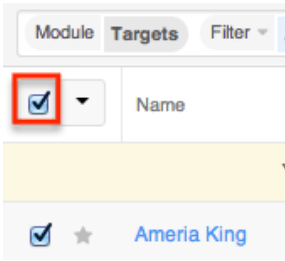
- Select This Page : Selects all records shown on the current page of target results.




- Select all records : Selects all records in the current search results across all pages of target results.

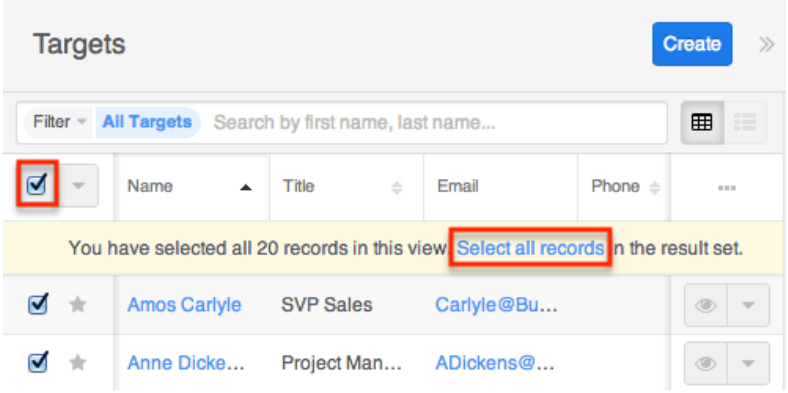



- Clear Selections : Deselects all records that are currently selected.

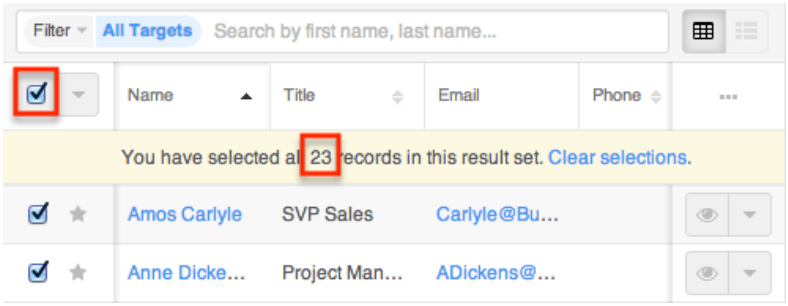



## Total Record Count

You can view the total record count on the Targets list view by selecting all records displayed on the current set of list view results. Once the records are selected, a dialog will appear allowing you to select all records in the results set.

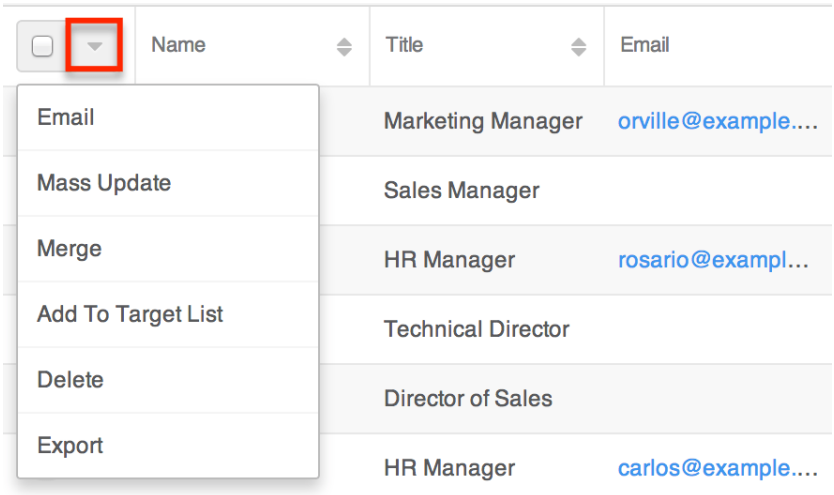



The total count of all records on the list view result set will appear in the dialog.




## Mass Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.



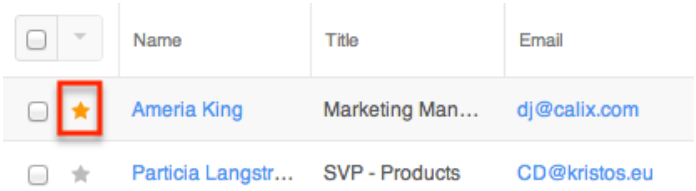

The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Email | Email one or more targets at a time |
| Mass Update | Mass update one or more targets at a time |
| Merge | Merge two or more duplicate target records |
| Add to Target List | Add one or more targets to a target list |
| Delete | Delete one or more targets at a time |
| Export | Export one or more targets to a CSV file |
| Recalculate Values | (Available in certain circumstances) Updates calculated values to reflect changes to calculated fields made in |

| | |
|---|---|
| | Studio |

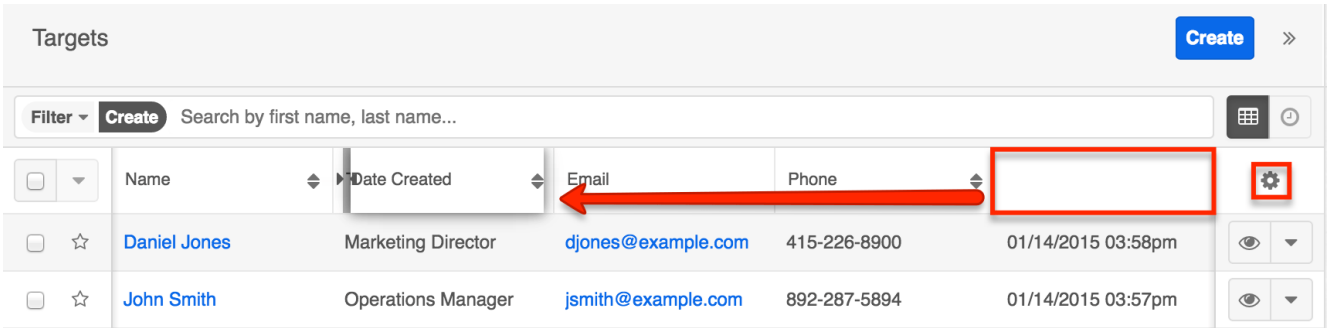
## Favorite Designation

Users have the option to mark target records as favorites via the list view as well as the record view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Targets module tab. In the Targets list view, the star on the left of each target's row is yellow once marked to indicate a favorite target. For more information on how to mark records as favorites, please refer to the Favoriting Targets section of this documentation.




## Column Reordering

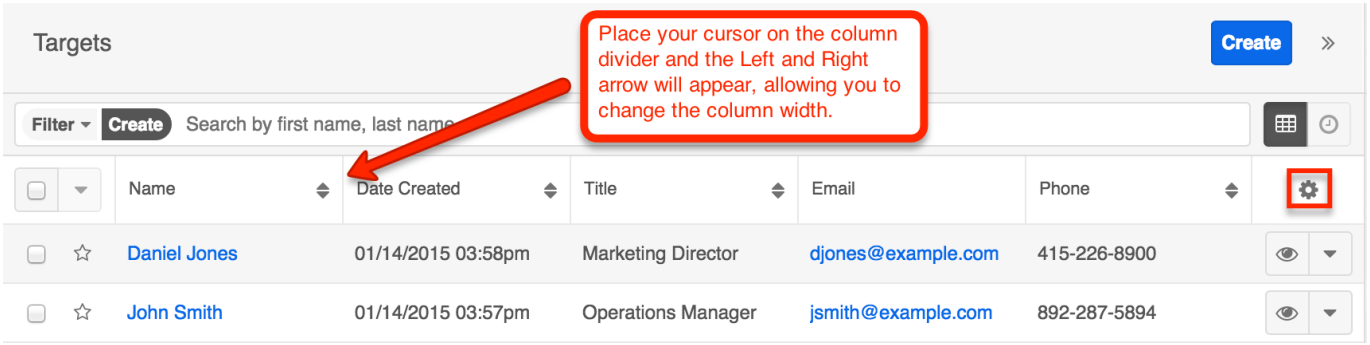
List view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the default column order.




## Column Resizing

Users can easily adjust the size of columns in the Targets list view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar

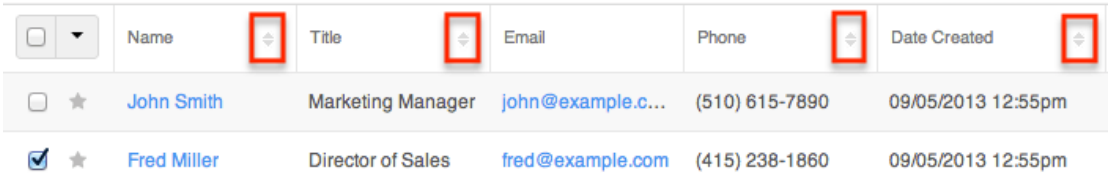
will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the current list view is different from the default column width. Changes to the column width made by administrators in Studio are only respected if the user has not resized the specific column in the list view. The column size set by the user will supersede the default column width configured in Studio until the user resets the list view back to the default widths.




## Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows.

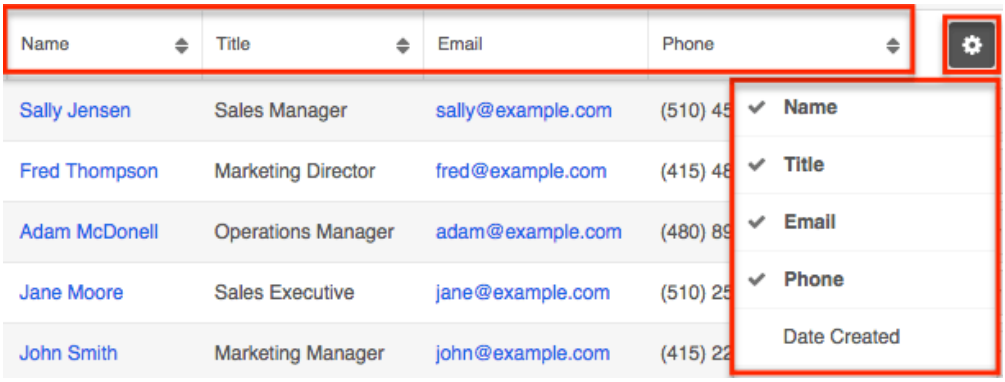
Note: List views may only be sorted by one column at a time and cannot be sorted by custom relate fields.




## Column Selection

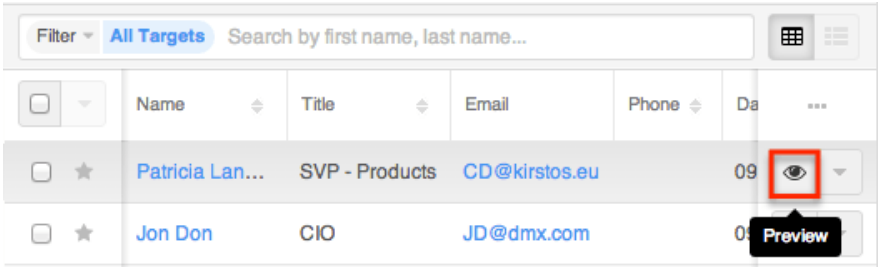
Sugar gives users the ability to personalize the list view by specifying which fields they want to be displayed in the list view. You can click the Column Selection icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column on your list view. Please note that administrators have the ability to configure what fields are available to display in the list view via Admin > Studio. For more information on configuring fields to display in the list view, please refer to the Studio

documentation in the Administration Guide.

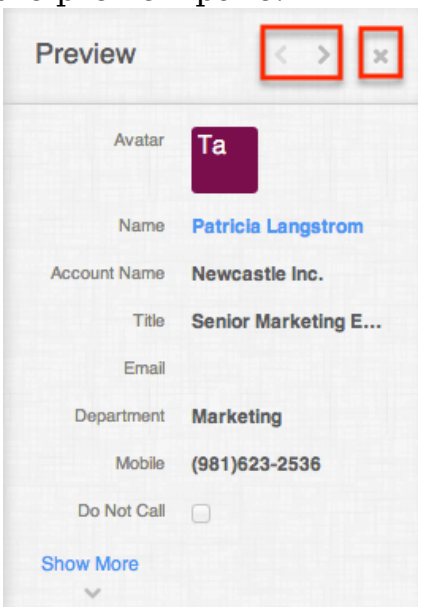



## Preview

Users can view a record's details directly from the Targets list view by clicking the Preview icon to the far right of each target's row.

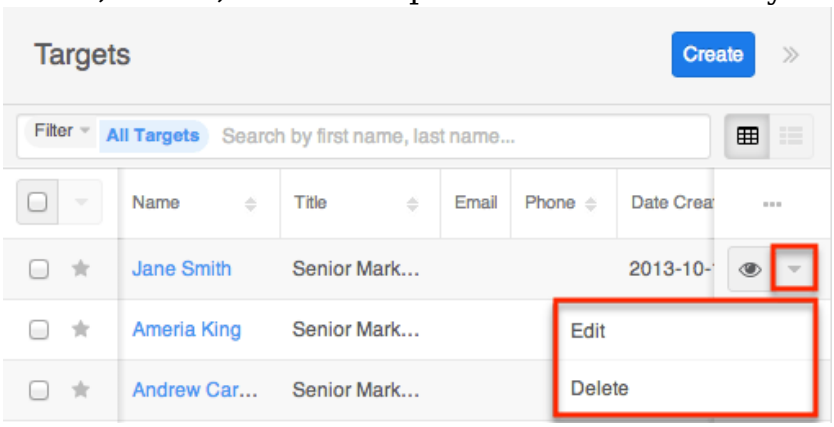



The record's data will display to the right of the list view providing key information regarding the record as well as the related activity stream information. On the upper right of the preview pane, there is a Left and Right arrow button that allows you to scroll through the list view's current search results by previewing the next or previous record. To close the preview, simply click the "X" on the upper right of the preview pane.



## Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to edit, follow, or delete specific records directly from the list view.

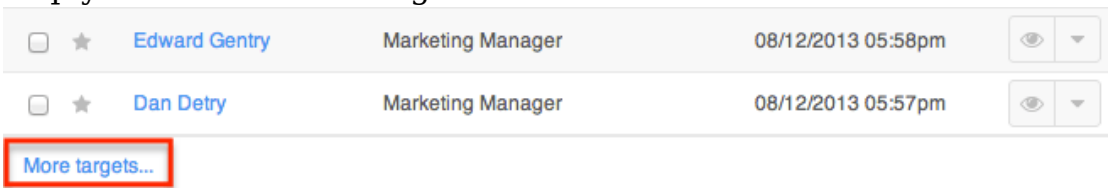



The options in the Record Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this target |
| Delete | Delete this target |

## More Targets

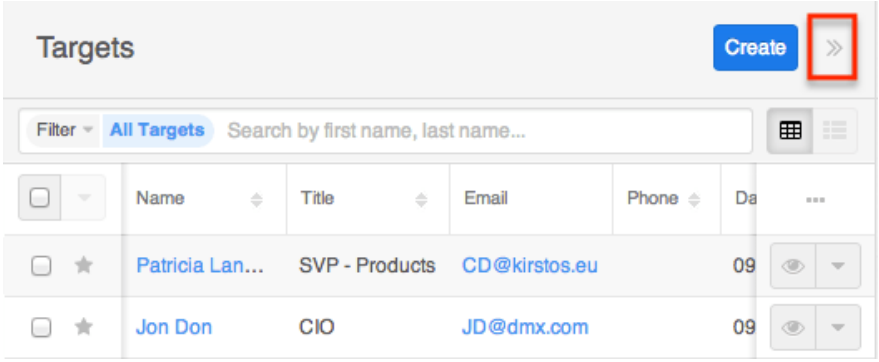
The list view loads an initial number of records meeting the current search criteria with the option to show additional results at the user's request. By default, Sugar displays 20 records per list view results set, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide. To load the next set of list view results, simply click the More Targets link at the bottom of the list view.




## Right Hand Side Drawer

On the upper right of the Targets list view there is a Double arrow icon which allows users to expand the list view to the full screen width. The intelligence pane

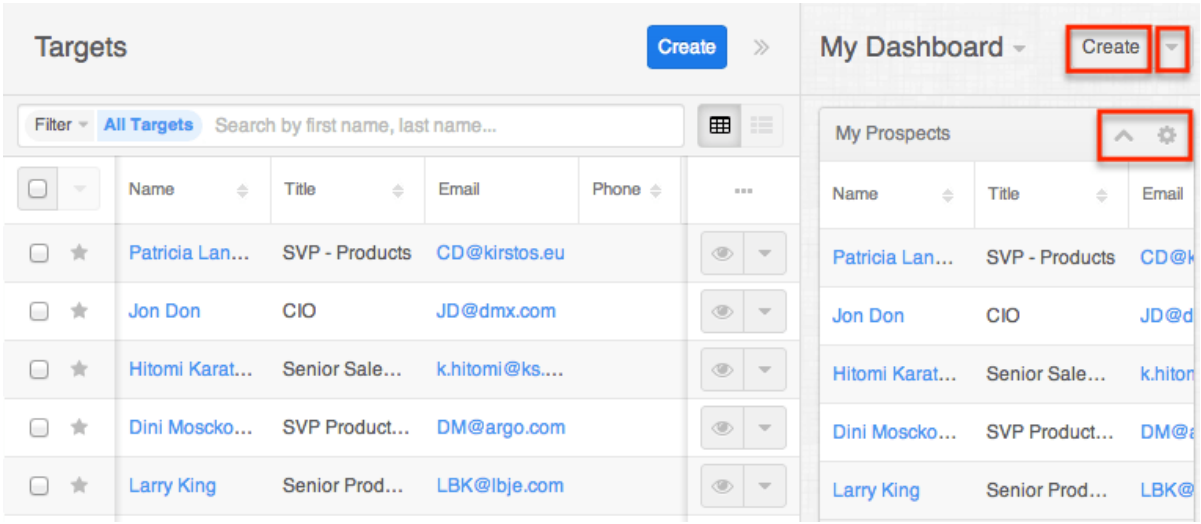
to the right of the list view will be hidden when the list view is expanded. To reduce the list view's width and reveal the intelligence pane, simply click the Double arrow icon again.




## Intelligence Pane

An intelligence pane displays to the right of the Targets list view and provides users with valuable record information via various dashlets. The Help dashboard normally displays by default along with the List View Help dashlet and Learning Resources dashlet. The List View Help dashlet provides users with a brief introduction to the module along with a link (e.g. Targets documentation) to the corresponding documentation in the Application guide. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may create other dashboards for use with the Targets module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets (e.g. My Targets, etc.) to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do no wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Targets module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.



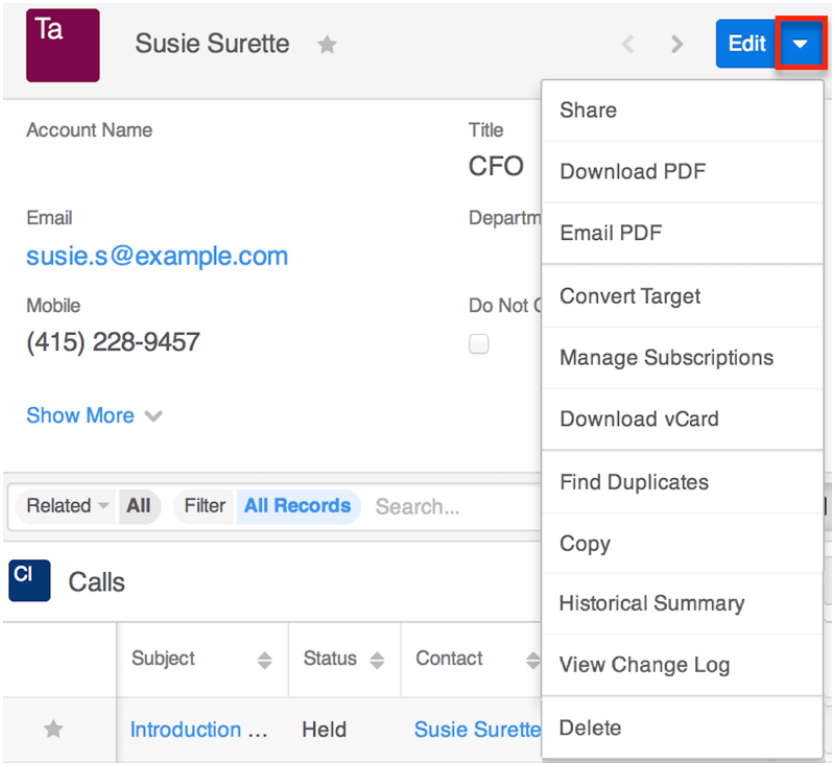

# Targets Record View

The Targets record view displays thorough target information including all target fields which are grouped by default into the Overview, More Information, and Other panels. You can also view a target's related records (Activities, History, Campaigns) which appear in subpanels beneath the target fields. The record view can be reached by clicking a target record's link from anywhere in the application including from the Targets list view.

Please note that you will only be able to view a target record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Users with administrator or developer access have the ability to change the record view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Actions Menu

The Actions menu on the top right of each target's record view allows you to perform various actions on the current record.

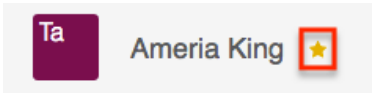



The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this target |
| Share | Share a link to this target via email |
| Download PDF | Download target information as a PDF file |
| Email PDF | Email target information as a PDF attachment |
| Convert Target | Convert this target to a lead |
| Manage Subscriptions | Manage this target's newsletter campaign subscriptions |
| Download vCard | Download a vCard from Sugar and transfer this target's information to another application (e.g. Outlook) |
| Find Duplicates | Locate potential duplicates of this lead |
| Copy | Duplicate this contact |
| Historical Summary | View a historical summary of activities (e.g. calls, meetings, etc.) related to this target |
| Delete | Delete this target |

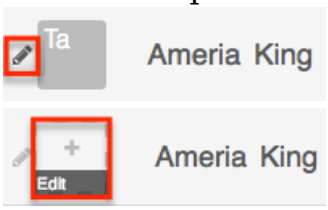
## Favorite Designation

Users have the option to mark target records as a favorite via the record view as well as the list view. This allows users to designate records that are important or will be viewed often as they can easily be accessed via search or from the Targets module tab. In the Target's record view, the star on the right of the target's name is yellow once marked to indicate a favorite target. For more information on how to mark records as favorites, please refer to the Favoriting Targets section of this documentation.



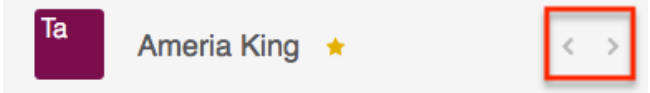

## Target Image

Users can select an image for their target. This allows users to associate a relevant picture with their target. To edit a target's picture from record view, click the pencil in front ot the target picture, then press on the "+" to select a new picture. Click the "Open" button to update the picture.




## Next or Previous Record

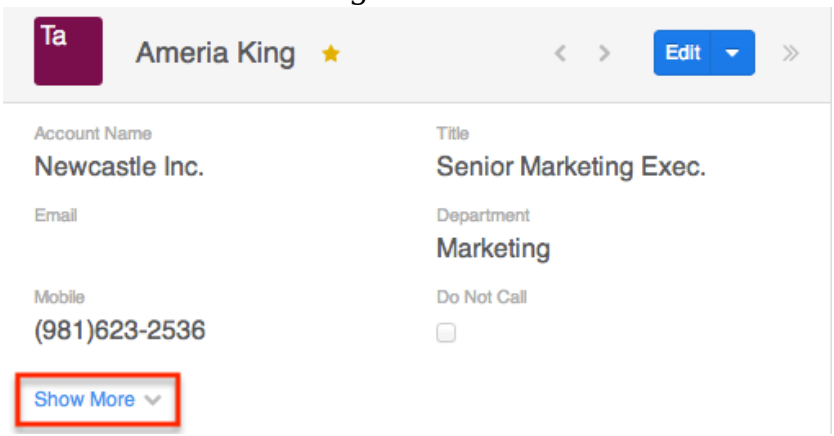
On the upper right of the Target's record view, there are two buttons that allow you to page through each target in the Targets list view's current search results. Clicking the Previous button displays the previous target of the current search results while clicking the Next button displays the next target of the current search results. The text in between shows which target result you are currently viewing within the total number of current results.




## Show More

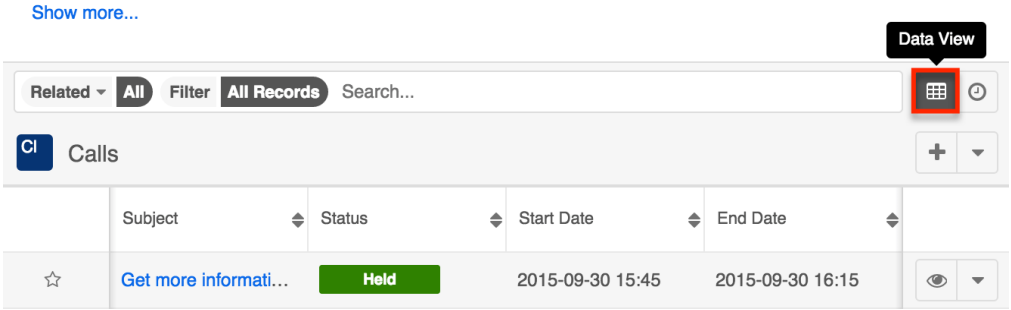
The Targets record view typically display a few key fields (e.g. website, industry, office phone, etc.) on the business card panel with the option to view more fields

by clicking the Show More link on the bottom left. Please note that administrators can configure what fields appear on the business card panel via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.




## Subpanels

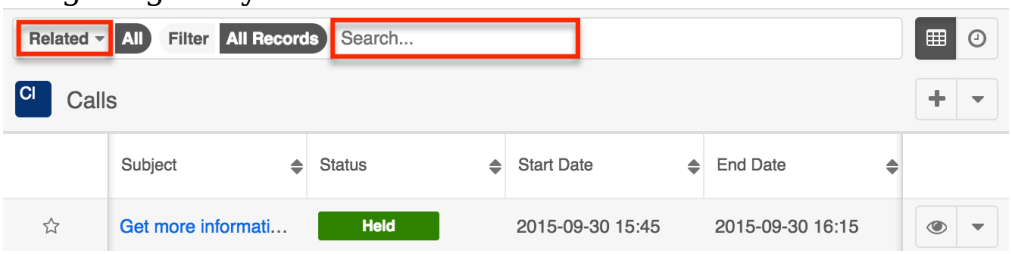
Beneath a target record's fields are subpanels containing related records from various modules and campaign interaction history for this target.



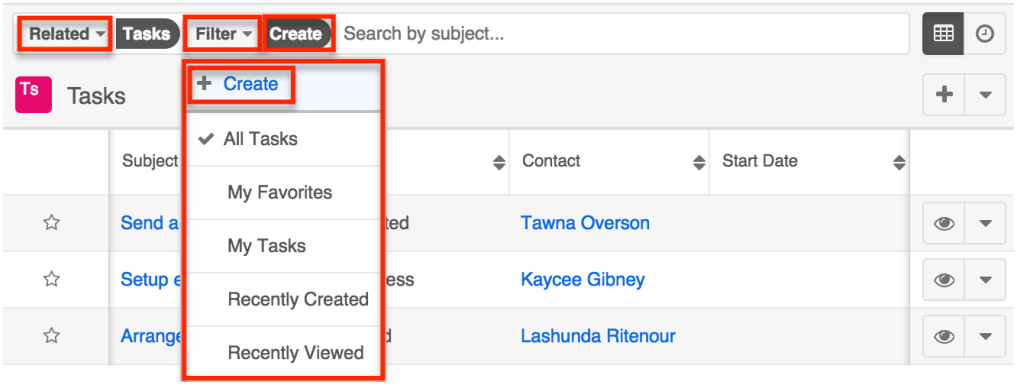

### Filter Options

While in Data View, all of the target record's related records will be displayed beneath the target record's fields. Users have the ability to search for records which appear in the subpanels as well as filter the view to only display a specific module (e.g. Tasks, Notes, etc.). To locate a record by name, enter the keyword into the Search bar, and the subpanel(s) with the matching record(s) will appear below. To filter, simply click the Related option to the far left of the Search bar and select the module whose subpanel you wish to view. Filter and search may be combined to only display matching records within a selected module. To see all subpanels to which you have access, simply select "All" in the Related options and remove any text from the search bar. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the page. Returning to the page will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when

navigating away.

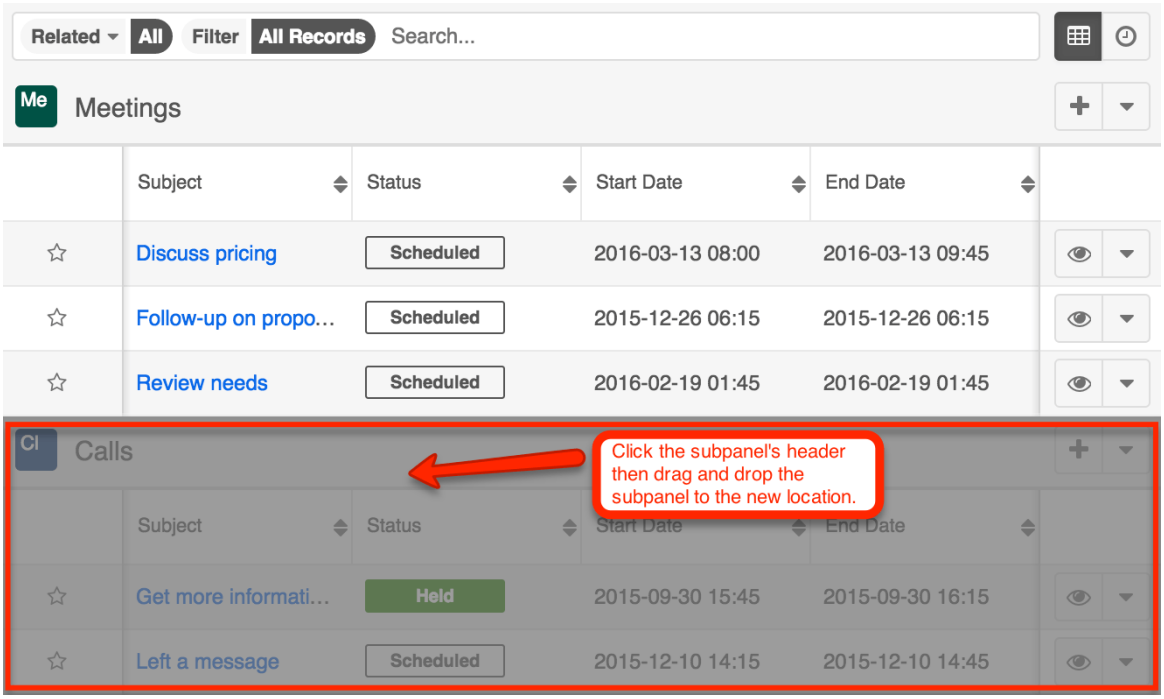



When a Sidecar module (e.g. Tasks, Notes, etc.) is selected from the Related options, you have the option to filter the related subpanels further using one of the available options (e.g. My Favorites, Recently Created, etc.). Please note that you can also create custom filters for related Sidecar modules. Once the related module (e.g. Tasks) is selected, either click the Filter option and select "Create" or click "Create" to the right of the Filter option. For more information on creating a related records filter, please refer to the Creating a Related Records Filter section of the Search documentation.




Reordering Subpanels

Users can easily move subpanels to a new location on the record view by dragging and dropping the subpanel's header. The new subpanel order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared.




Related Record Subpanels

The most common type of subpanels displayed on a target's record view contain the target's related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. For example, a target may be related to multiple notes which means that the related notes will be displayed in a subpanel beneath the fields.

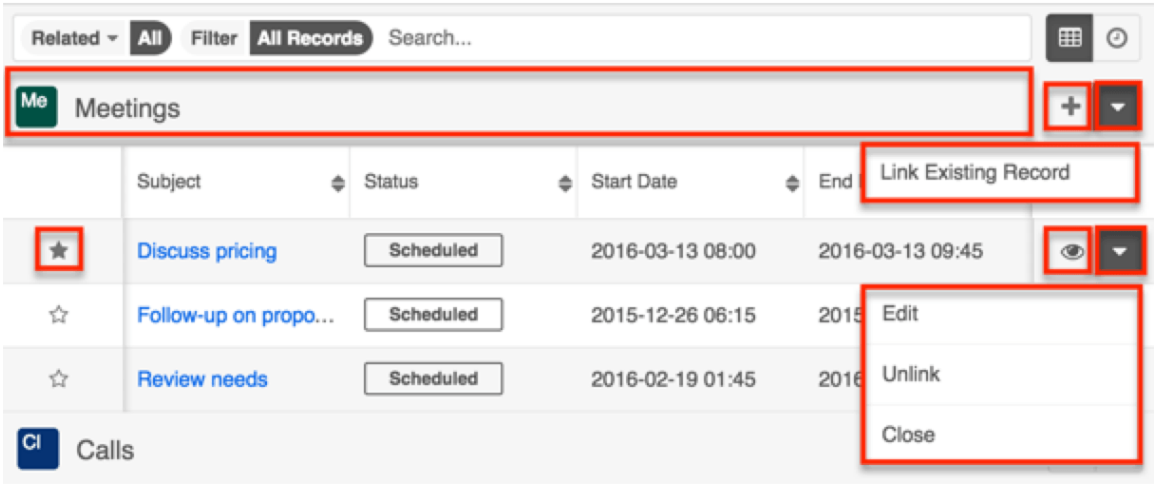
Users with administrator or developer access have the ability to change the fields (e.g. Subject, Status, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.

Related record subpanels allow the following operations to be performed:

- To view the details of a related record, click the record's name in the subpanel to open it in record view.
- To relate an existing record to the target, choose "Link Existing Record" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the target, click the Plus button to the left of the Actions menu, then complete the record view layout and click "Save".
- To preview the related record, click the Preview icon to the far right of the record's row in the subpanel.
- To inline edit the record directly from the subpanel, choose "Edit" from the

Actions menu on the far right of the record's row and click "Save" to preserve the change.

- To delete the target's relationship to a record, choose "Unlink" from the Actions menu on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To mark the record as a favorite, click the star icon to the left of the desired record's row.
- To collapse or expand the subpanel, click anywhere on the subpanel's header.
- To change the column size in the subpanel, place your cursor on the column divider and when the Left and Right arrow appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.




Emails Subpanel

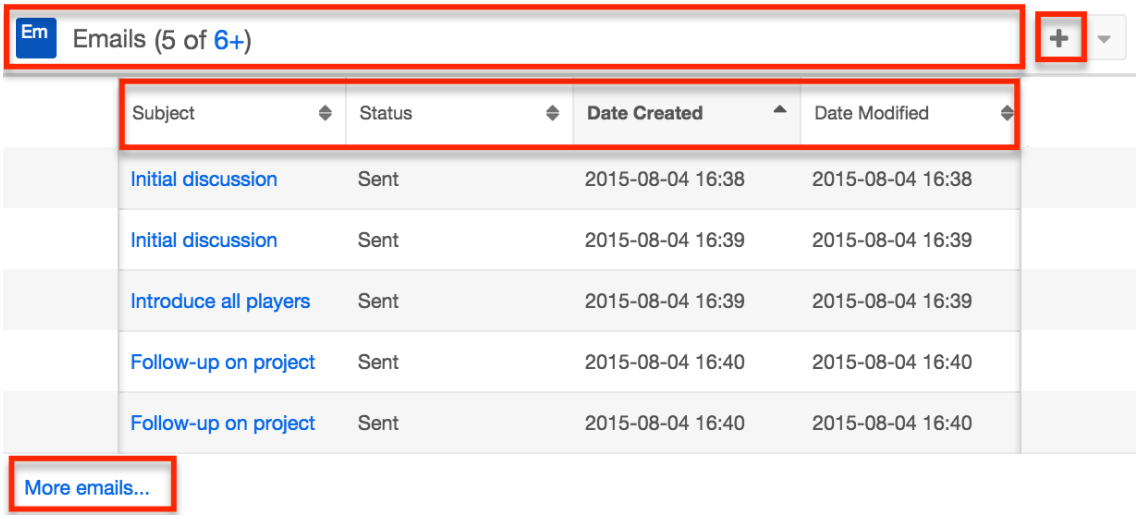
The Emails subpanel in the Targets module displays both emails implicitly and explicitly related to the account record. Emails in Sugar are implicitly related to records in Sugar that match an email address in the From, To, or Cc fields in the email. This implicit relationship is made for emails sent from Sugar as well as any email imported into Sugar via Inbound email accounts or email archiving. While composing an email or relating an existing email to a record, users have the ability to set an explicit relationship via the flex relate field by Relating Emails. This allows the email to be explicitly related to a single record from one of many modules.

The Emails subpanel allows the following functions to be performed:

- To view the details of an email, click the subject in the subpanel to open it in detail view.
- To collapse or expand the subpanel, click anywhere on the subpanel's header.
- Click "+" to create a new email that will have an implicit relationship with this

record.

- Sort the emails by Subject, Status, Date Created, Date Modified, or Assigned User.
- Click "More emails" to see any additional emails hidden by the default view.
- To change the column size in the subpanel, place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. For more information on resizing columns, please refer to the Column Resizing section of this documentation.
    - Note: The subpanel column width will not be preserved when you navigate away from the page.




Campaign Logs Subpanel

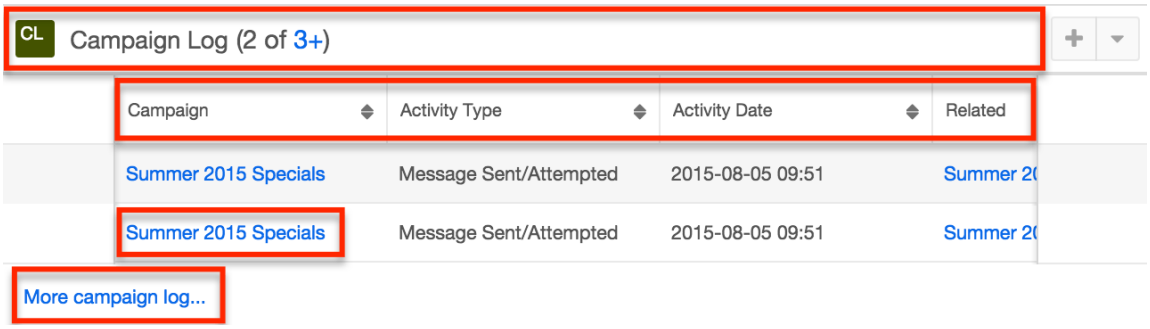
The Campaign Log subpanel contains historical information regarding a target record's interaction with all Sugar campaigns. When a mass marketing campaign is sent to a target (or manually marked as sent in the case of non-email campaigns), the related campaign activity information will appear within the Campaign Logs subpanel. This information mirrors the "View Status" page available from within each individual campaign and shows activities such as when a campaign was sent, when the target viewed the campaign message, when the target clicked a tracked link within the campaign, etc. Since this subpanel contains historical campaign interactions for the target, it cannot be used to associate a target with a campaign or otherwise manage a campaign or target list. For more information on associating a target with a campaign, please refer to the Adding Targets to a Target List section of this documentation.For more information on campaigns, please refer to the Campaigns documentation.

The Campaign Log subpanel allows the following functions to be performed:

- To view the details of a campaign, click the campaign's name in the subpanel

to open it in detail view.

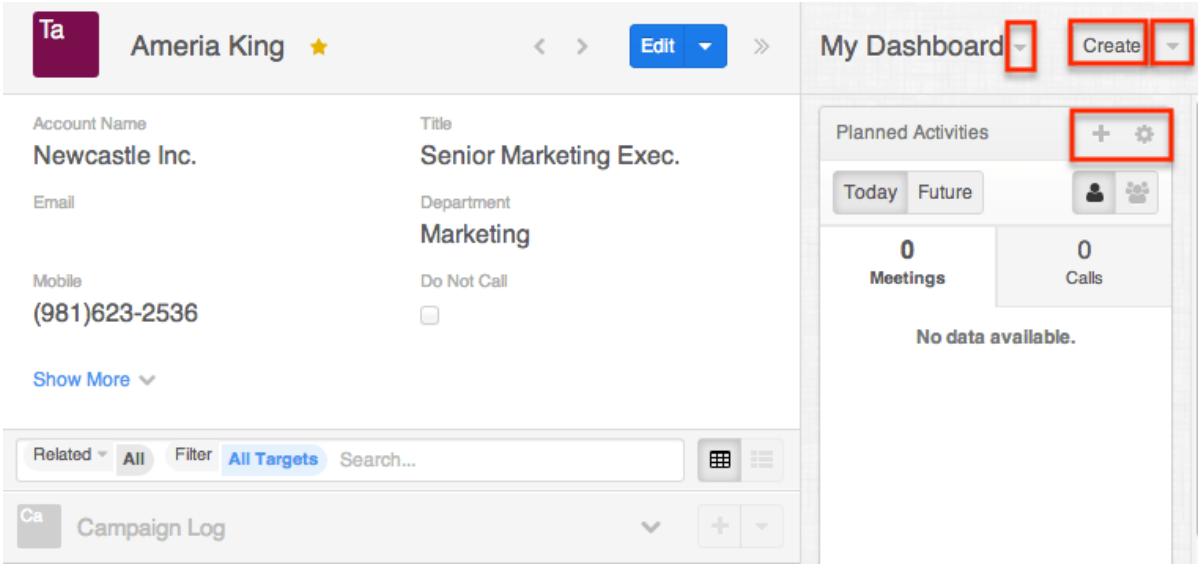
- Sort the campaigns by Campaign Name, Activity Type, Activity Date, or Related.
- To collapse or expand the subpanel, click anywhere on the subpanel's header.
- To load the next set of records in the subpanel, click the More campaign log link on the bottom left of the subpanel.
- To change the column size in the subpanel, place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. For more information on resizing columns, please refer to the Column Resizing section of this documentation.
    - Note: The subpanel column width will not be preserved when you navigate away from the page.




## Intelligence Pane

An intelligence pane displays to the right of the target's record view and provides users with valuable record information via various dashlets. The Help Dashboard normally displays by default along with the Record View Help dashlet and Learning Resources dashlet. The Record View Help dashlet provides users with a brief introduction to the module along with some instructions to help users utilize and navigate around the record view. A link to the corresponding documentation (e.g. Targets documentation) in the Application guide is also provided within the Help dashlet. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard, which will display some stock dashlets (e.g. Planned Activities dashlet, History dashlet , etc.) by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may choose to view any of their dashboards using the triangle to the right of the current dashboard's name and may create other dashboards for use with the Targets module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do not wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Targets module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.



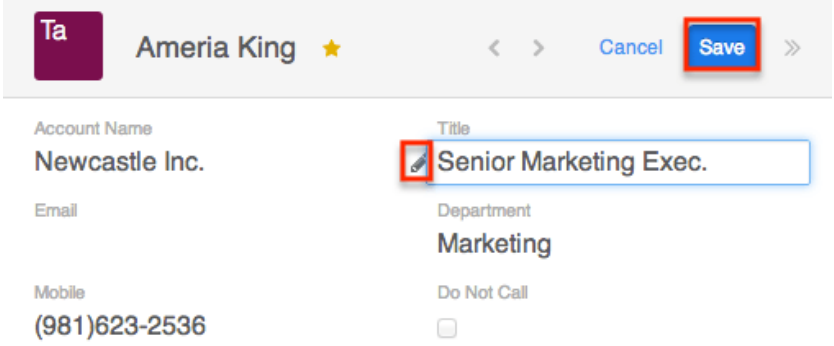

## Editing Targets

Targets may be edited at any time to update or add information to the record. You can make changes to existing target records via the Targets record view and quick create forms. Record view is available within the Targets module and includes all of the Target fields you should need.
Please note that your ability to edit targets in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure both the Targets record view and quick create via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

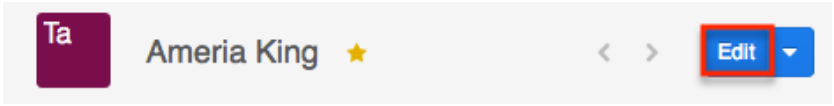
### Editing Inline Via Record View

Users can edit individual fields on a Target's record view without entering the full edit mode by clicking the Pencil icon to the left of the field's value. This will allow users to type or select a new value. Click "Save" to preserve the changes made to the field.

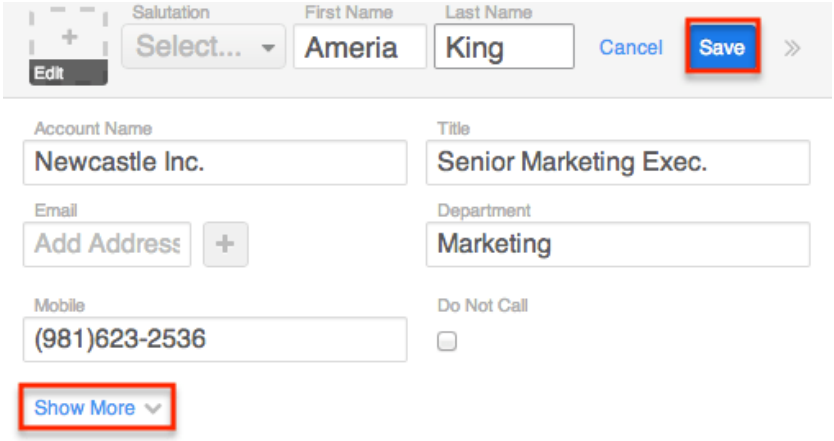



## Editing Via Record View

You can edit targets via the record view by clicking the Edit button on the upper right of the page.

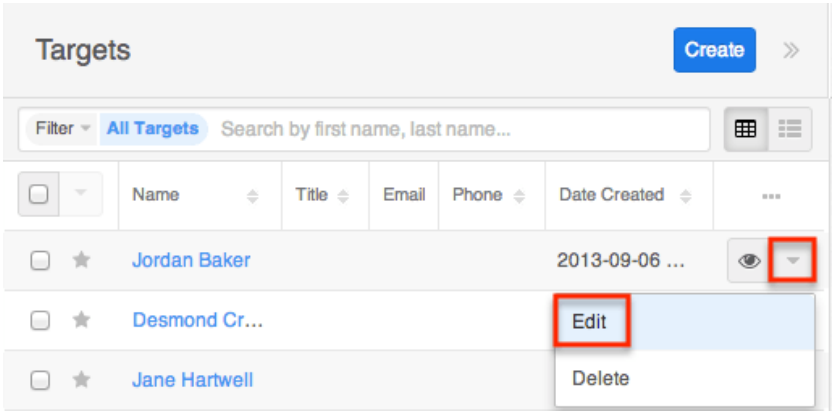



Update the necessary fields, then click "Save" to preserve the changes.

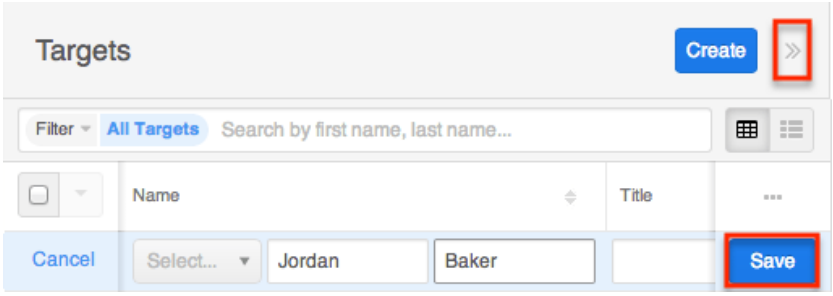



## Editing Inline Via List View

You can edit targets via the list view by clicking the triangle icon to the right of each target's preview and choose "Edit".




The target will become editable, inline as a shortened version of the record view layout. Click the double arrows to the right of the "Create" button to expand the editing window. Update the necessary fields, then click "Save" to preserve the changes.




Note: Text area fields are not inline editable from list views.

## Deleting Targets

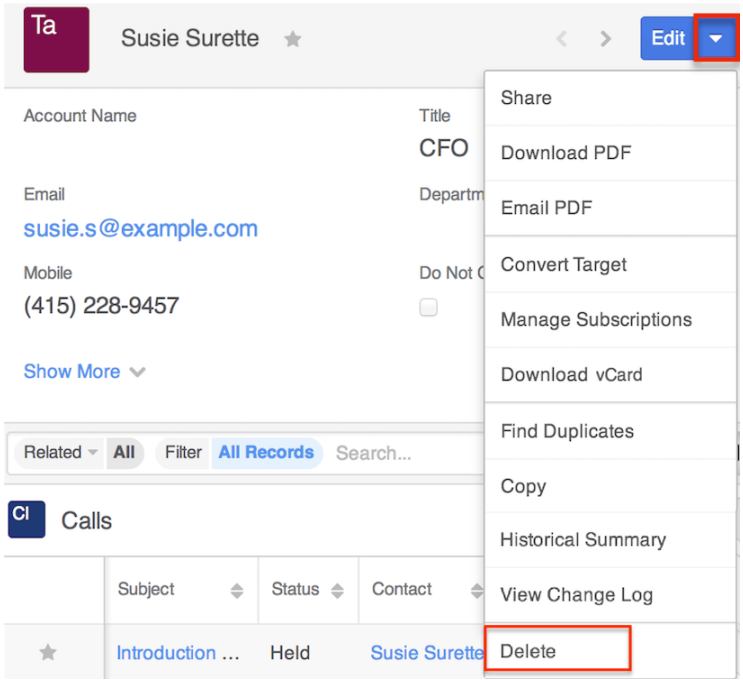
If a target record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Target's record view or list view. Deleting via the record view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting target records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

Please note that your ability to delete targets in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

### Deleting Via Record View

Use the following steps to delete a target record via the record view:

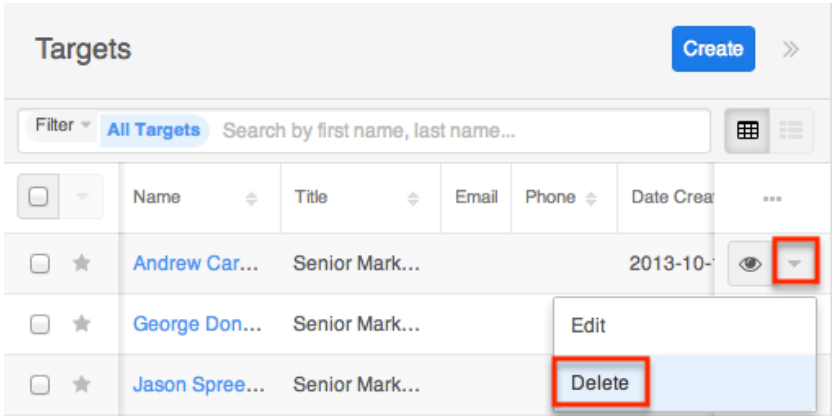
1. Navigate to a target record's record view.
2. Select "Delete" from the Actions menu.




3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

## Deleting Via List View

1. Navigate to the Targets list view by clicking the Targets module tab.
2. Use the Module Search to find the Target record you wish to delete.
3. Click the Record Actions Menu to the far right of the record's row and select "Delete".

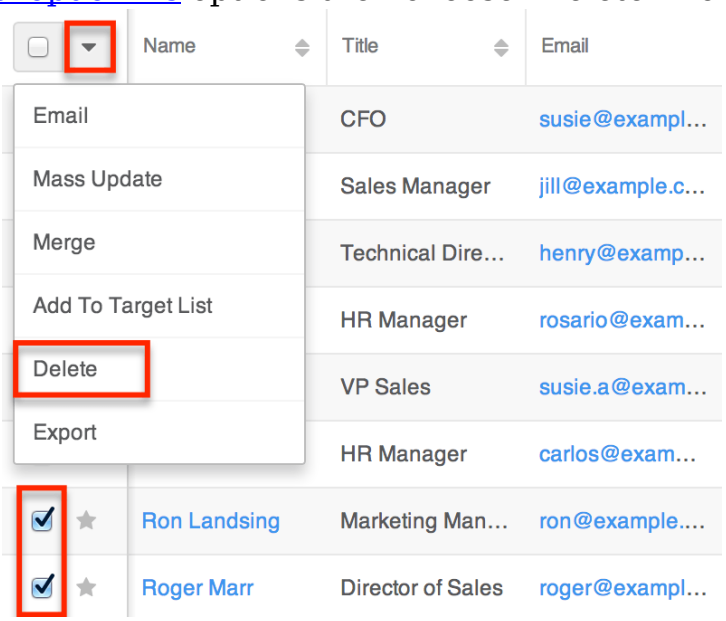



4. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

## Mass Deleting Via List View

Use the following steps to delete one or more target records via the list view:

1. Navigate to the Targets list view by clicking the Targets module tab.
2. Use the Module Search to find the target records you wish to delete.
3. Select the desired target records individually or using the checkbox dropdown's options then choose "Delete" from the Actions menu.




4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

You can also use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to delete more than 1000 records or delete a specific group of records on the list view, please use the in module search to perform the deletions in smaller batches.

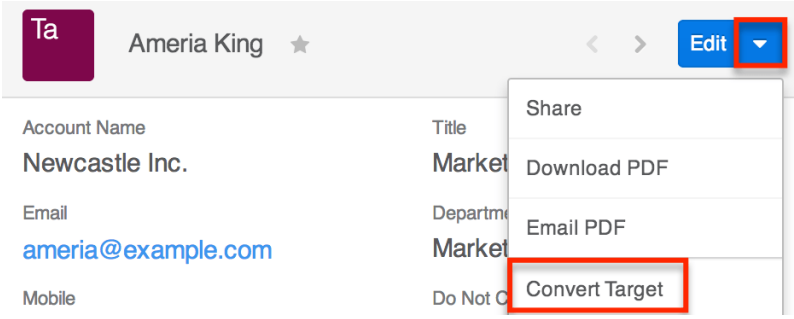
## Converting Targets

Sugar enables you to convert targets into leads as you determine they qualify for your organization's definition of a lead (e.g. after an evaluation/qualification process) and becomes a valid sales prospect. Please note that targets are only converted into leads in Sugar, and the new lead record will have a relationship to the original target record. Once the lead is qualified as a sales opportunity, they can be converted into contacts, opportunities, and accounts. For more information on lead conversions, please refer to the Leads documentation.

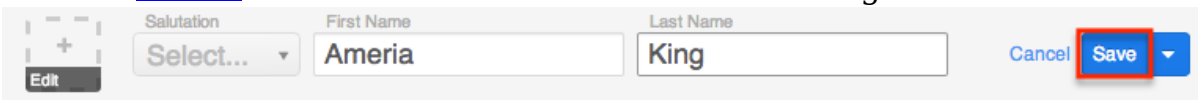
### Steps to Convert a Target

Once the target has been evaluated and qualified, they are ready to be converted to a lead in Sugar.
The following steps cover converting a target to a lead as an example:

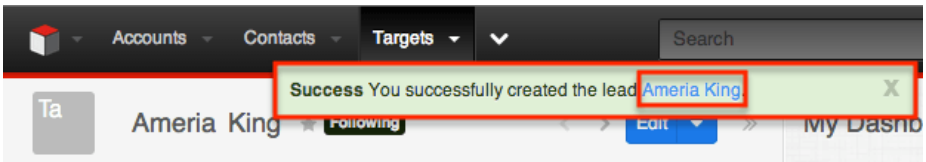
1. Navigate to a target's record view.
2. Select "Convert Target" from the Actions menu.




3. Enter appropriate values for the fields in the Leads record view layout then click "Save".
    - Since targets only convert to a lead, the Leads record view displays all lead fields which are grouped by default into the Overview, More Information, and Other panels. Administrators have the ability to determine what fields are displayed on the Leads record view via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.




4. Once the conversion is complete, the target record will display the converted lead name at the top of the record view page. You can click the records name to view the detail of the converted lead.

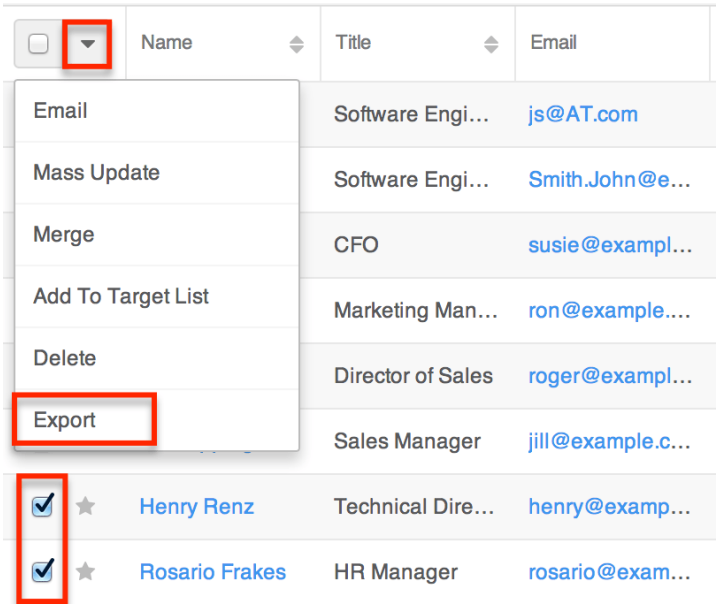



## Exporting Targets

Sugar's Export option allows users to download all fields for the selected targets to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Target data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered targets back into Sugar. For more information on updating existing records via import, please refer to the Import documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of target records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Targets may be exported from the Targets list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for targets and

their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.



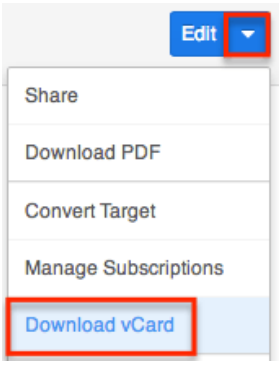

Please note that your ability to export targets from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

## Downloading a Target's vCard

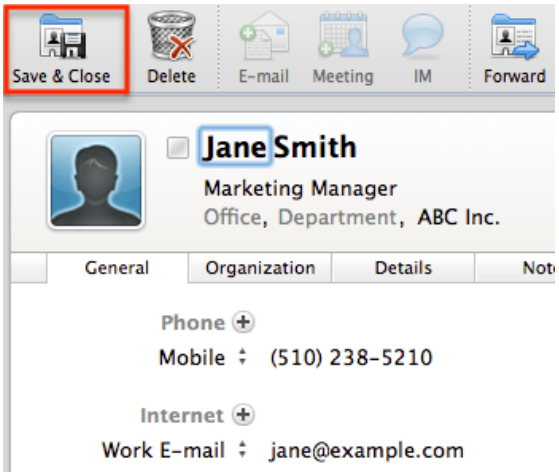
vCards are electronic business cards that are exchanged through applications such as email and web browsers. In addition to being able to create a target from an existing vCard , you can also download a vCard from Sugar in order to transfer the target's information to another application.

The following steps cover downloading a vCard and saving it as a target in Microsoft Outlook as an example:

1. Navigate to a Targets record view.
2. Select "Download vCard" from the Actions menu to download the vCard file.




3. Open the downloaded file in your mail or address book application. For this example, double clicking opens the vCard in Outlook.
4. Make any necessary changes to the information, then click "Save & Close" to save this lead in Outlook.



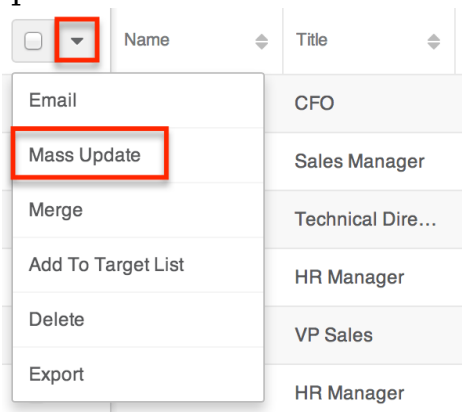

## Mass Updating Targets

Mass Updating allows users to make the same change to multiple target records at once from the Targets list view. Users with administrator or developer level access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide. You can use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to update more than 1000 records or update a specific group of records on the list view, please use the filter option in module search to perform the updates in smaller batches.

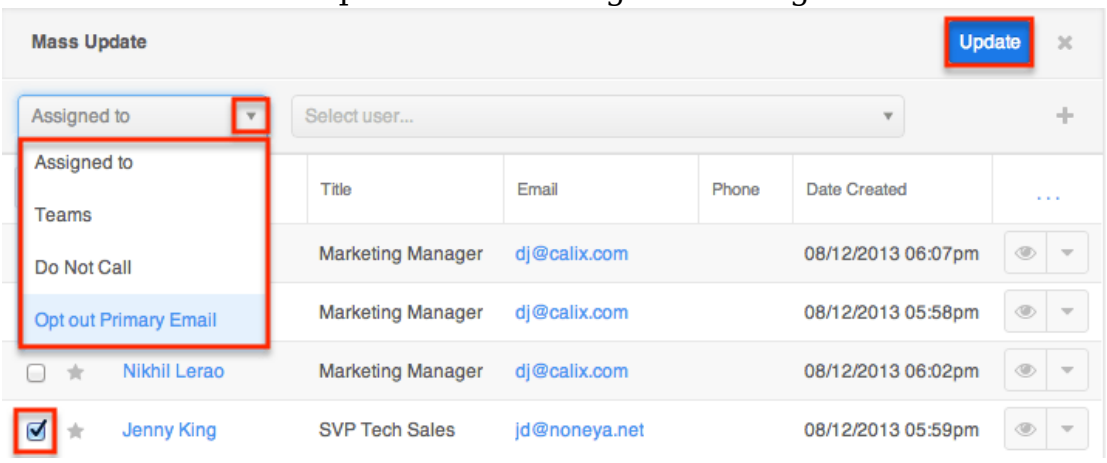
Please note that your ability to mass update targets may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

Use the following steps to mass update target records from the list view:

1. Navigate to the Targets list view by clicking the Targets module tab.
2. Use the Module Search to identify targets you wish to modify.
3. Select the desired targets individually or using the checkbox dropdown's options then choose "Mass Update" from the Actions menu.




4. The Mass Update panel will appear below the search bar. Set values for the field(s) you wish to alter.
   - To add additional fields for mass update, click the Plus icon to the right of the dropdown list.
   - Note: For the Teams field, mark "Append Team(s)" to add the teams specified here to any existing team assignments. Not marking the checkbox will replace the existing team assignment with the new one.




5. Click "Update" to save the changes to all of the currently selected target records.

## Recalculating Calculated Values

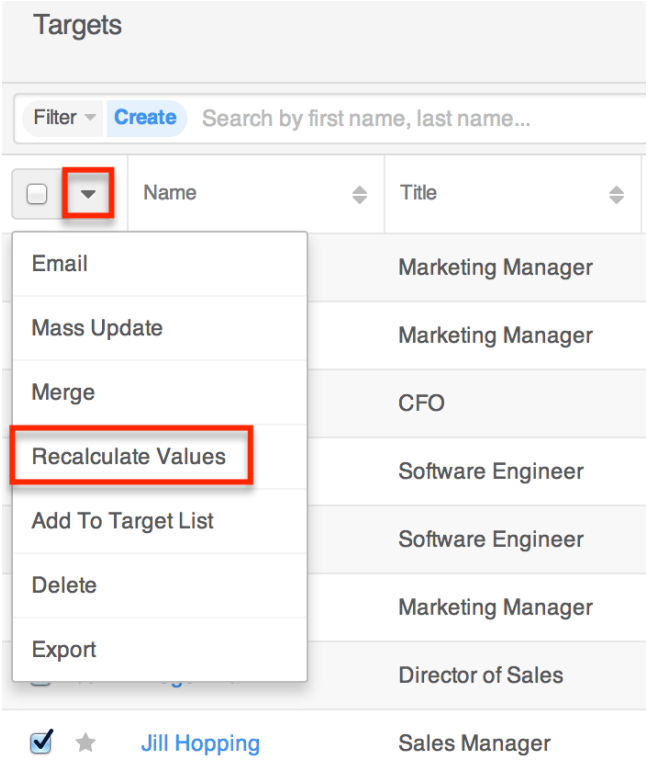
This feature allows calculated values to be recalculated following the addition or alteration of a calculated field in Studio. For more information on calculated fields, please refer to the Studio documentation in the Administration guide. Sugar allows you to select up to 1000 records at a time for recalculating values. If you desire to

recalculate values for more than 1000 records, you will need to perform the recalculation in several batches.

Note: This action will not appear unless the user is an Admin or has developer-level access to the module and if there is at least one calculated value in that module. Please note that your ability to recalculate values may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Recalculate Values option.

The following steps cover recalculating values for records from the Targets list view as an example:

1. Navigate to the Targets list view by clicking the Targets module tab.
2. Use the list view's Module Search to identify targets you wish to update.
3. Select the desired targets then choose "Recalculate Values" from the Actions menu.




## Finding Duplicate Targets

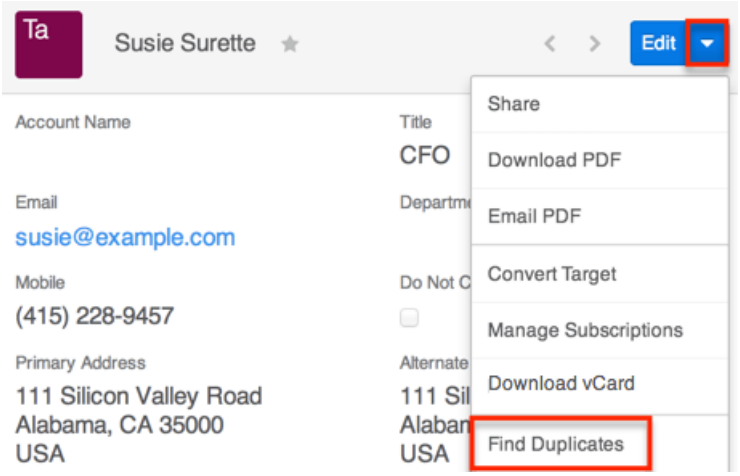
Between multiple users working in Sugar, importing new records, and converting leads, it is possible for duplicate target records to be accidentally input to the system. Before creating a new target record, a good practice is to first check that the target does not already exist in Sugar. You can locate duplicate records for

cleanup using module search from the Targets list view. Searching for targets with similar names or other information can turn search into a powerful, duplicates-finding tool. Sugar also provides a wizard for finding potential duplicates that is available from the Targets record view and may be used as shown below. If duplicate target records are detected, you can perform a merge per the Merging Targets section of this documentation.

Please note that your ability to use the Find Duplicates action may be restricted by any role which prevents target deletion. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Find Duplicates option.

Use the following steps to locate duplicate targets using the Find Duplicates option from the Targets record view:

1. Navigate to a target's record view.
2. Choose "Find Duplicates" from the Actions menu.




3. Potential duplicate target records will be listed on the Find Duplicates page. Select the duplicate record(s) you wish to merge then click "Merge Duplicates".
    - You can preview the duplicate record's details by clicking the Preview button to the far right of the records row.
    - You can search for specific records from the Targets list view if you wish to check for more possible duplicates. For more information on performing a search, please refer to the Module Search section of this documentation.
    - You can also click the Column Selection icon above the Preview button to change the list of fields that display on the list view column headers.

Once you click "Merge Duplicates", the merging process with the current record will begin. For instructions on performing the merge that follows, please refer to Steps 3-9 of the Merging Via List View section of this documentation.

# Merging Targets

When duplicate records are identified in Sugar, you have the option to merge two or more targets into a single record. Once the merge is complete, the duplicate note record(s) will be deleted, and the primary record will remain. Please note that all relationships belonging to the duplicate targets will be merged to the primary record meaning that any calls, meetings, contacts, etc. related to the duplicate note record(s) will automatically be related to the resulting, merged note record.

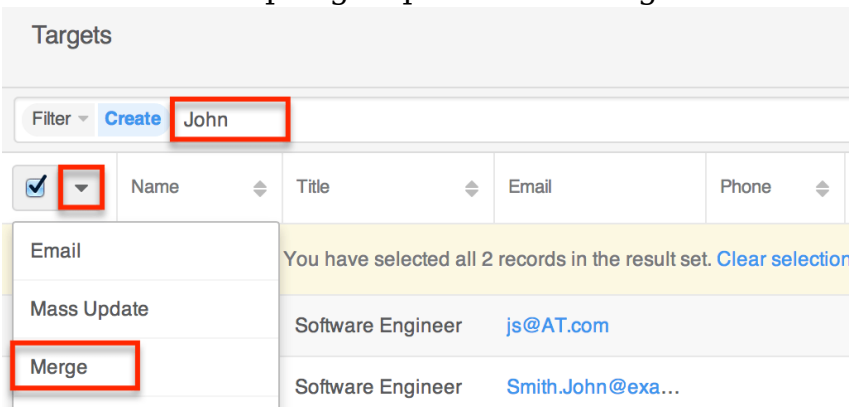
Note: Date Created, Date Modified, and Password field types are not supported when merging duplicate records in Sugar.

## Merging Via List View

Module Search may be used to identify duplicate targets by, for example, searching for targets with similar names or related targets. Once your search has identified duplicate targets, you can merge them directly from the Targets list view.

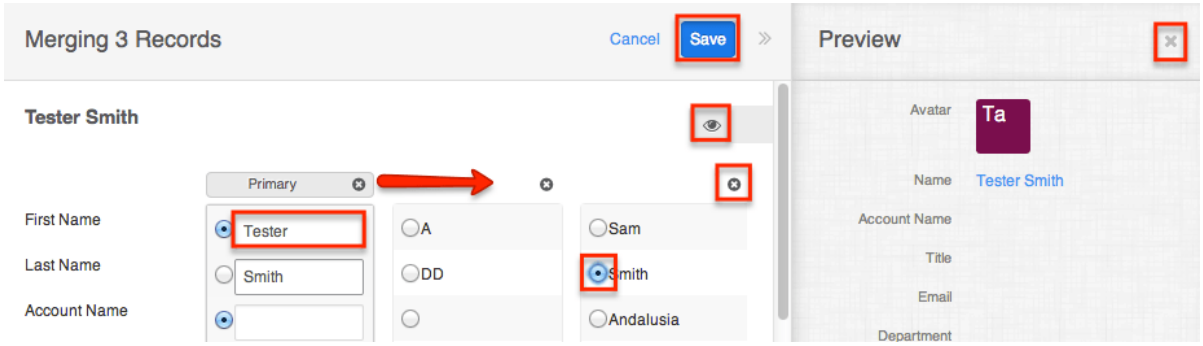
Use the following steps to merge targets via the list view:

1. Use the Module Search to identify duplicate targets.
2. Possible duplicates will be displayed in the list view. Select the duplicate record(s) that you wish to merge.
    - Please note that up to five records may be merged at once in Sugar. An error message ("Invalid number of records passed. The valid range is from 2 to 5 records.") will appear if more than five records are selected when attempting to perform a merge.




3. Select "Merge" from the Actions menu to display the Merging Records page. The primary record's field values are displayed on the left while other record's values are in columns to the right. For convenience, fields with

differing values will appear on the top of the list. Saving the merge will preserve only the field values marked with the radio button into a single record.




If 3 or more records are selected to be merged, an X icon will appear at the top right of each record. Clicking the "X" will remove the record from the merge process but will not delete the record.

4. To change which record is considered the primary, drag and drop the Primary label on the top of a different column.
5. Review the field values in each column and click the radio button to the left of the value that should appear on the final record. You can also manually type or select a new value for any field as necessary.
    - Note: Fields you do not have Edit access for cannot be edited on the merging records page.
6. Preview what the final, merged record will contain as you work by clicking the eye icon to display the preview in the Intelligence Pane.
7. Click "Save" once all fields you wish to appear on the single, merged record have their radio buttons selected.
8. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Confirm" to proceed.

## Favoriting Targets

Each Sugar user has the option to designate their own favorite targets which are important or will be viewed often so that they can easily be accessed via search or from the Targets module tab. Once records are marked as favorites, use the My Favorites filter in the Targets Module Search to retrieve your favorites or select from your most recent favorites directly from the Targets module tab .

### Favoriting Via List View

Use the following steps to mark records as favorites via the Targets list view:

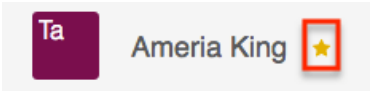
1. Navigate to the Targets list view by clicking the Targets module tab.
2. Use the Module Search to find the Target records you wish to mark as favorites.
3. Mark the star icon on the left of each desired target's row.
4. To remove the target as a favorite, click the star again to revert it to white.




## Favoriting Via Record View

Use the following steps to mark records as favorites via the Targets record view:

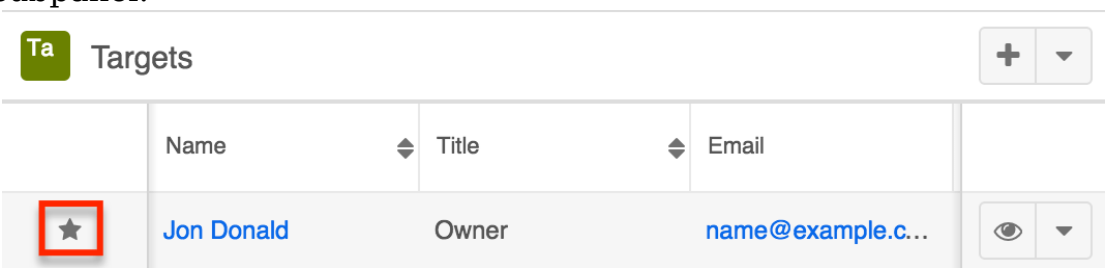
1. Navigate to a target record's record view.
2. Click the star icon to the right of the target's name in the upper left of the record view to designate it as a favorite.
3. To remove the target as a favorite, click the star again to revert it to white.




## Favoriting Via Subpanel

Use the following steps to mark target records as favorites via the subpanel in related modules:

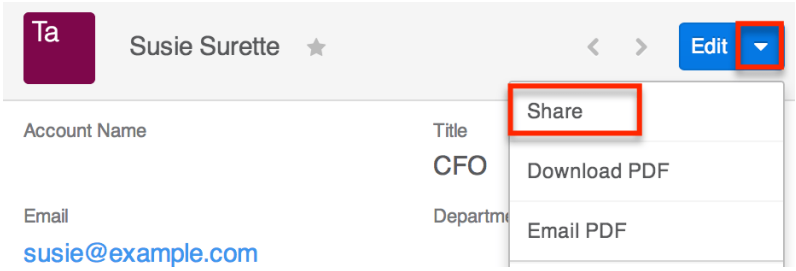
1. Navigate to a related module's record view.
2. Click the star icon to the left of the desired record's row in the Targets subpanel.




3. To remove the target as a favorite, click the star again to revert it to white.

# Sharing Targets

Individual Target records can be shared with other users in your organization by sending an email with the record's link directly from the record view. In the target's record view, select "Share" from the Actions menu which will open a Compose Email window including the URL of the target record. Enter the recipient(s) email address in the To field then click "Send".




Users can simply click the link in the email to access the target record in Sugar. Please note that the user must be logged into Sugar in order to access the record. Users will only be able to view the shared record as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

## Downloading Target Information as a PDF

Users have the option to download target information as a PDF file via the Targets record view by clicking the Actions menu and selecting "Download PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Download PDF option in the Actions menu. Simply select one of the templates to generate the PDF file to view or save onto your local machine. Please note that the Download PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.

## Emailing Target Information as a PDF

Users also have the option to email target information as a PDF file using any of the available Targets module templates using Sugar's email client. Simply click the Actions menu and select "Email PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Email PDF option in the Actions menu.

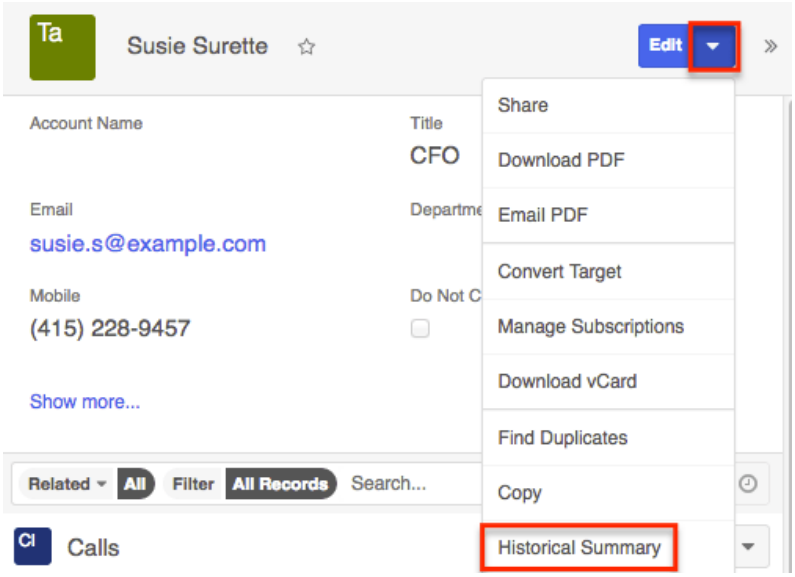
Select one of the templates to open a Compose window in the Emails module. The

email's To field will automatically populate with the email address of the target record, and the Subject field will display the target's name. The email is automatically related to the target record, and the chosen target PDF will be attached. You can update the fields as necessary and enter a body for the email message then click "Send". For more information on sending emails via the Emails module, please refer to the Emails documentation.

Please note that the Email PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.

## Viewing Activities' Historical Summary

Users can easily view quick details for the various related activities (e.g. calls, meetings, notes, emails, etc.) that have taken place via the Historical Summary option. Simply navigate to the target's record view and select "Historical Summary" from the Actions menu to view the historical activities related to the target in one place.

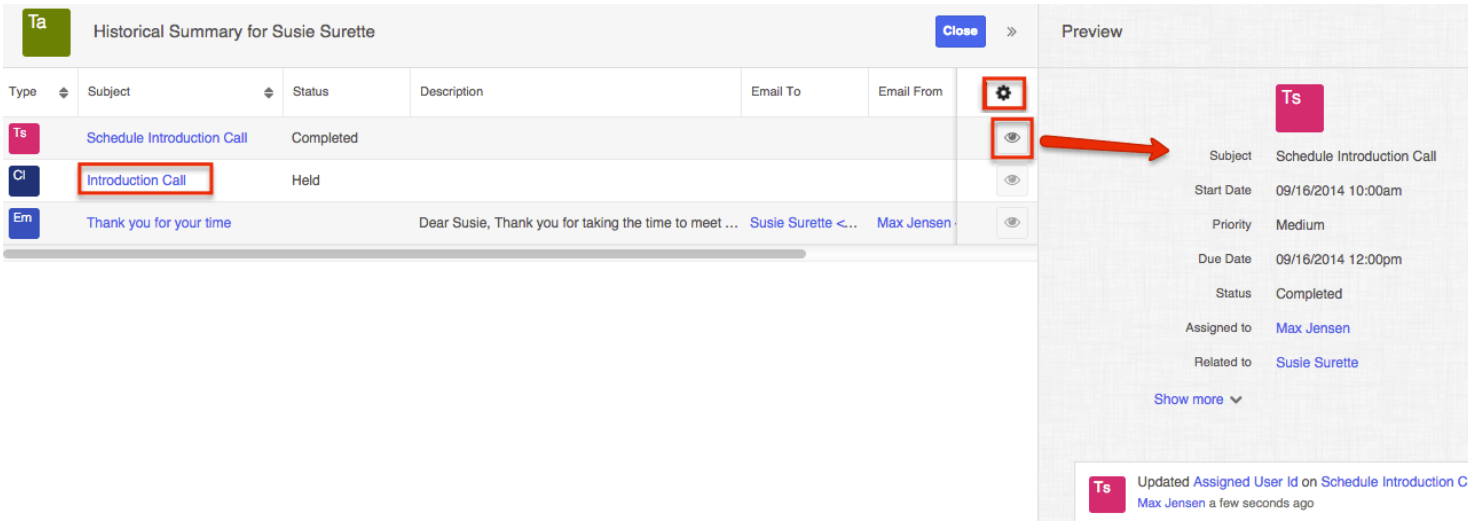



The Historical Summary page will display each activity's type, subject, status, description, date modified, etc. and you can simply click the activity's name to view the full details for each activity. Please note that you can add Date Created and User fields by clicking the Column Selection icon to the far right of the list view column headers. You can also preview the activity record via the intelligence pane by clicking the Preview icon to the far right of each record's row. It will provide users with key information regarding the record as well as the related activity stream information (if any). For more information on activity streams, please refer

to the Activity Streams documentation. Please note that preview is only available for modules (e.g. Task, Note) using the Sidecar user interface.

The historical summary list view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the system's default column order.

Users can also easily adjust the size of columns in the historical summary list view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the Historical Summary list view is different from the default column width.




## Emailing Targets

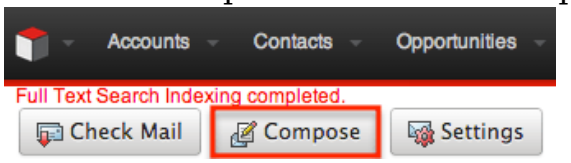
Sugar allows users to compose and send outbound emails to targets. There are various ways to send outbound mail to targets including emailing via the Emails module, Emails quick compose, Targets module, campaigns, and workflows. Please note that administrators in Sugar must first configure the outbound mail server for the system via Admin > Email Settings in order for users to send outbound emails. For more information on setting up the system email settings, please refer to the

documentation in the Administration guide. Users will also need to have their email settings configured in their user preferences prior to sending outbound email from the Emails module, Emails quick compose, or Targets module. For more information on setting up your user preferences' email settings, please refer to the

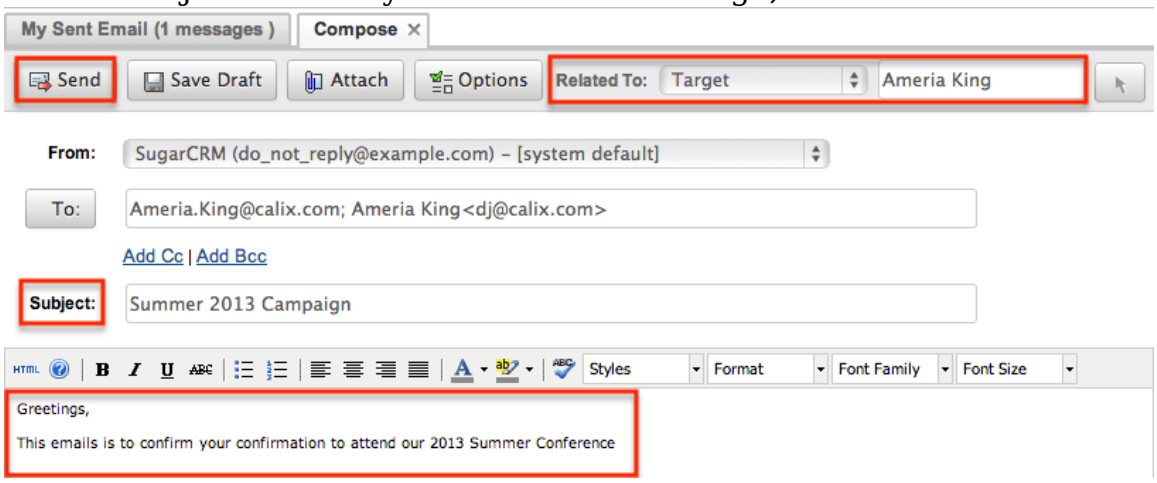
## Emailing Via the Emails Module

Use the following steps to compose and send an email to a target via the Emails module. For more detailed information on sending emails via the Emails module, please refer to the Emails documentation.

1. Navigate to the Emails module by clicking the Emails module tab.
2. Click the Compose button on the upper left of the Emails module.




3. For the "Related To" field, select "Target" as the module then enter or select the desired target's name. The email's To field will automatically populate with the name and email address of the selected target record.
4. Enter a subject and body for the email message, then click "Send".

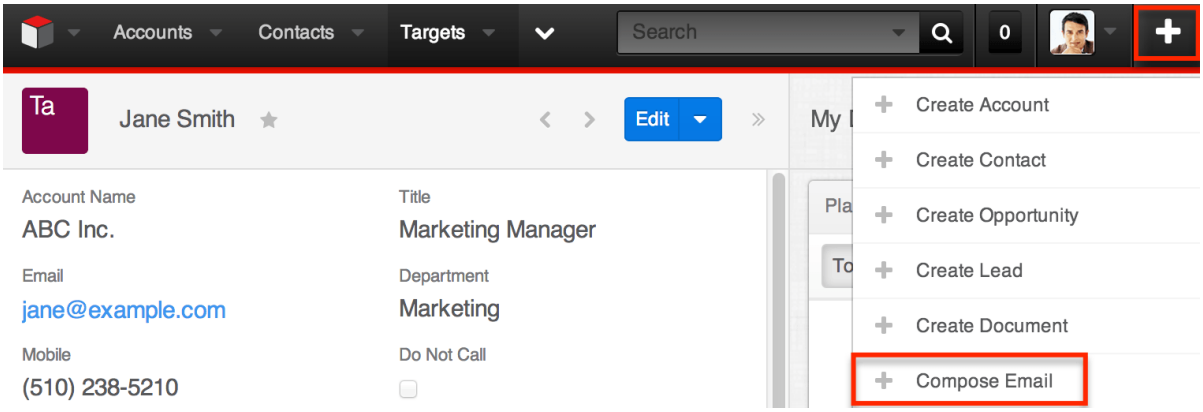



## Emailing Via Quick Compose

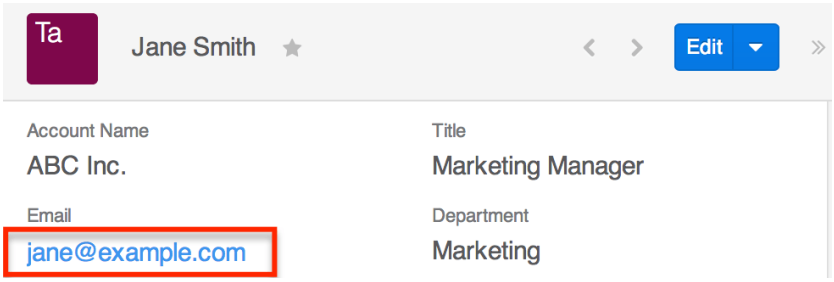
The quick compose option allows users to compose emails from various places in Sugar without navigating away from the current page.

While viewing a target record, you can select "Compose Email" from the Quick Create menu on the top right of any Sugar page. Quick creating an email while viewing a target's record view automatically populates the To field with the target's name including the email address as well as relating the email to the

target record.

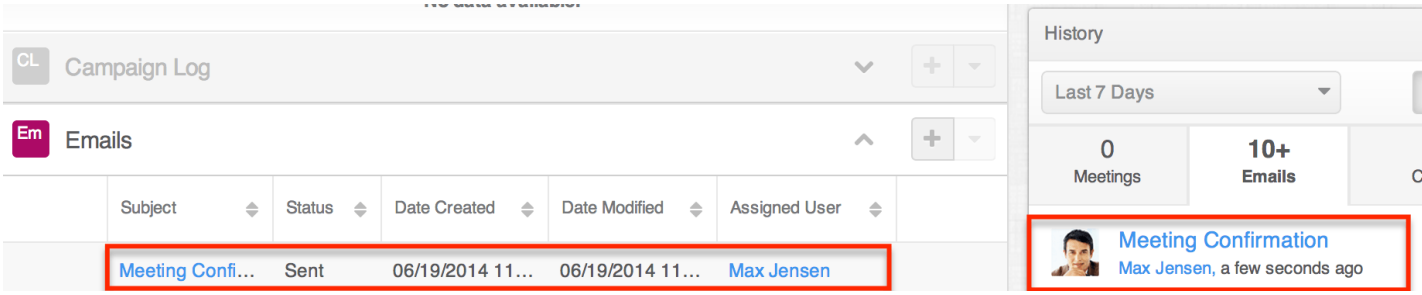



Users can also use Quick Compose by clicking a target's email address anywhere it is displayed as a link. Clicking the email address automatically populates the To field with the target's name and email address as well as relating the email to the target record.




Quick Compose is also available from the Activities subpanel in a target's record view. Choosing "Compose Email" from the Actions menu automatically populates the To field with the target's name and email address as well as relating the email to the target record.

Once the email is sent successfully, the email record will appear in the History dashlet and Emails subpanel of the target record. For more detailed information on sending emails via quick compose, please refer to the Emails documentation.

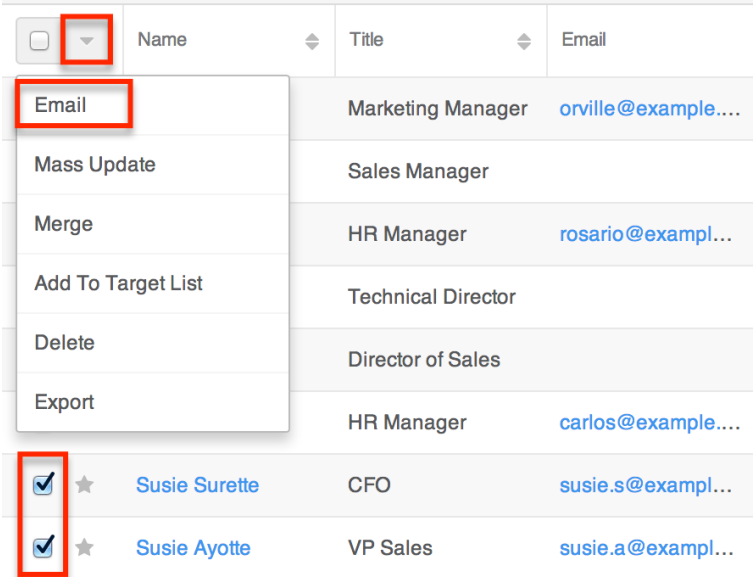



## Emailing Via Targets List View

One or more targets may be emailed at a time from the Targets list view simply by selecting the Email option from the Actions menu.

Use the following steps to compose and send an email from the Targets list view:

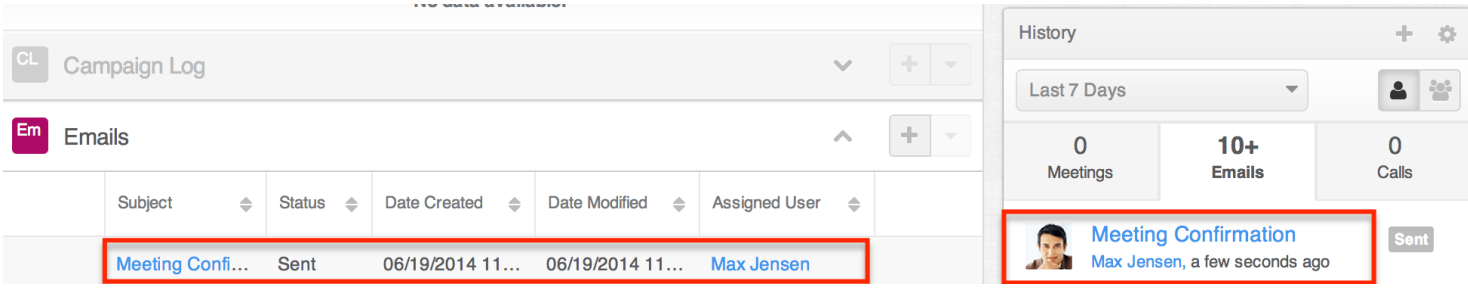
1. Navigate to the Targets list view by clicking the Targets module tab.
2. Use the Module Search to find the Target records you wish to include on the email.
3. Select the desired targets then choose "Email" from the Actions menu.




4. In the Compose Email window, enter in the subject and body of the email message, then click "Send".

- Note: The email's To field will automatically populate with the name of the selected target record(s).

Once the email is sent successfully, the email record will appear in the History dashlet and Emails subpanel of each target record.




## Emailing Via Campaigns

Sugar's Campaign Logs module can be used to create email and newsletter campaigns to send mass emails to a relevant set of targets. Email-type campaigns are mass emails sent to a target list while newsletter-type campaigns are a series of mass emails sent to a consistent or growing target list periodically or on a regular basis. For more information on sending mass emails to targets via a campaign, please refer to the Email Campaign section of the Campaigns documentation.

### Emailing Via Workflows

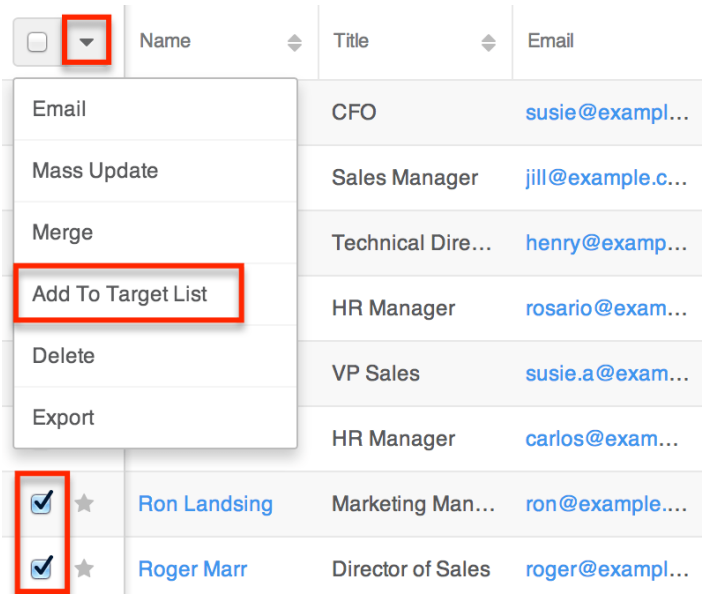
Sugar's Workflow module enables you to automate tasks, send email alerts, and execute various actions. With each workflow, a set of conditions trigger a combination of actions and email alerts potentially including alerts to target records. You also can create alert email templates used by workflows to insert relevant data to the automated email notifications. For more information on workflow email notifications, please refer to the Email Alert section of the Workflows documentation.

## Adding Targets to a Target List

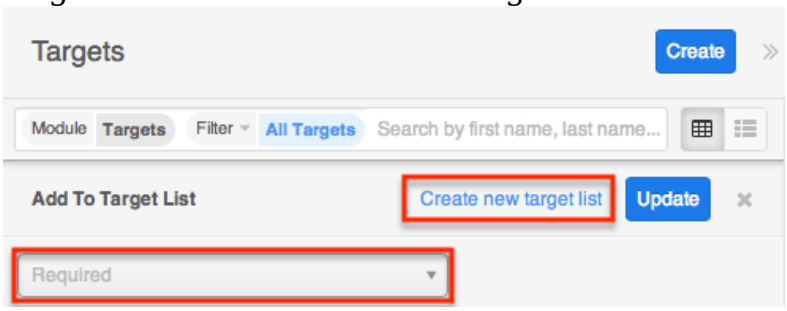
A target list consists of a group of individuals or organizations you want to be included or excluded on a mass marketing campaign. These targets are typically identified based on a set of predetermined criteria such as being a prospect or existing customer, age group, industry, etc. There are various ways to add targets to a target list in Sugar including using the Add to Target List option from the Target list view's Actions menu. For more information on target lists and the other methods of adding targets, please refer to the Target Lists documentation. You can use the Select All feature in the list view when adding to a target list, which will allow you to easily select the first 1000 records in the result set. If you wish to add more than 1000 records or add a specific group of records to the target list, please use the filter option in module search to perform the additions in smaller batches.

The following steps cover adding target records to a target list via the Targets list view as an example:

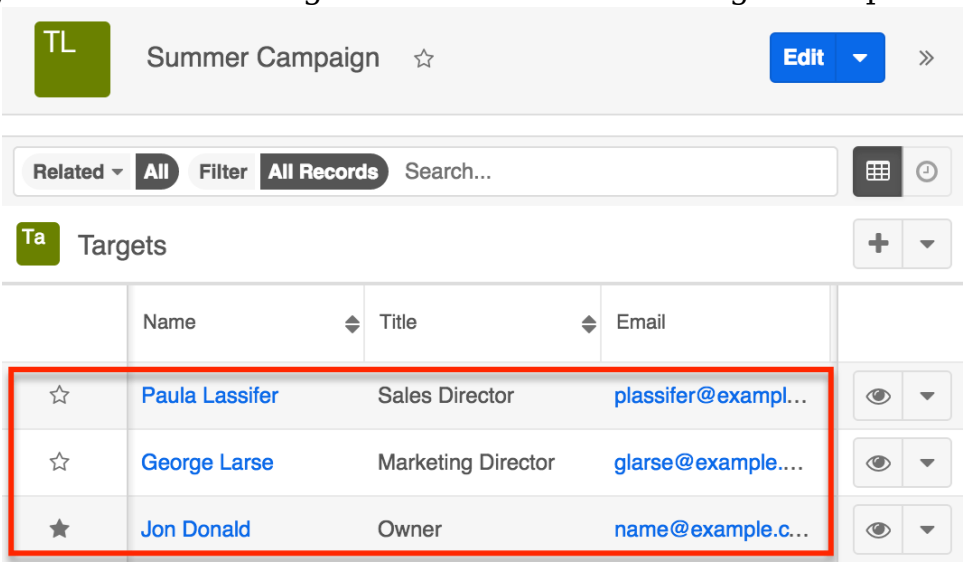
1. Navigate to the Targets list view by clicking the Targets module tab.
2. Use the Module Search to find the Target records you wish to add to a target list.
3. Select the desired target records individually or using the checkbox dropdown's options.
4. Choose "Add to Target List" from the Actions menu.




5. Locate and select the desired target list in the pop-up window or click "Create Target List" to add to a new target list.




6. In order to view the targets that have been added, you can navigate to the Target Lists module. Click the target list's name to enter the record view, and you will see the target records within the Targets subpanel.

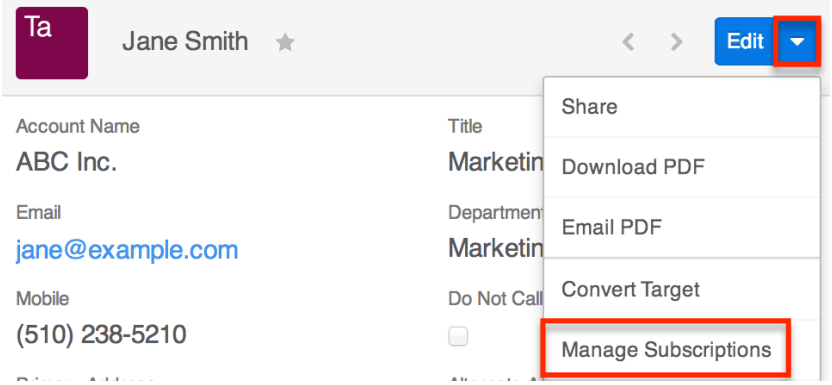



# Managing Target Subscriptions

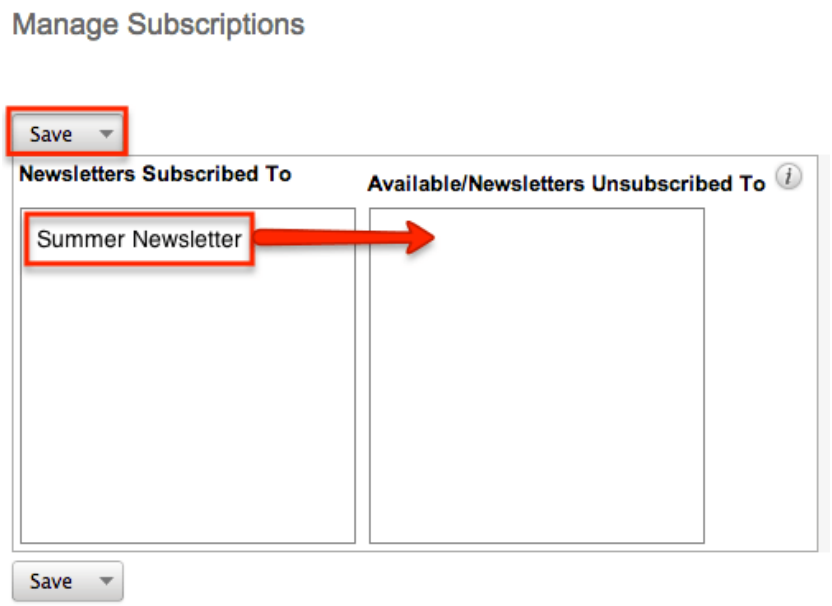
Targets who receive newsletter-type campaign emails from your Sugar instance are considered subscribers to that newsletter. Users can manage these newsletter subscriptions from the Target's record view using the Manage Subscriptions option in the Actions menu. Please note that you can only manage subscriptions for newsletter-type campaigns. A newsletter campaign you have created will have one or more default-type target lists. Targets are added to these target lists in order to receive your newsletter. The Manage Subscriptions option allows you to add a target to the default-type or suppression-type target lists of your newsletter campaigns without leaving the Targets module. For more information on newsletter subscriptions, please refer to the Campaigns documentation.

Use the following steps to manage target subscriptions via a target's record view:

1. Navigate to a target record's record view.
2. Select "Manage Subscriptions" from the Actions menu.



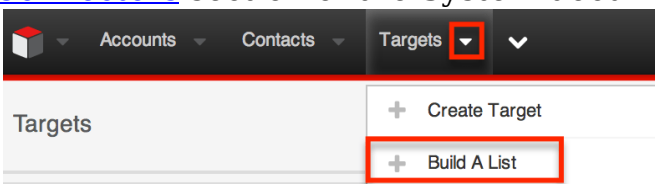

3. To add the target to a newsletter subscription mailing list, select the newsletter from the Available/Newsletters Unsubscribed To list and drag it to the Newsletters Subscribed To list. This will add the target to the campaign's default target list.
4. To remove the target from the newsletter subscription mailing list, select the newsletter from the Newsletters Subscribed To list and drag it to the Available/Newsletters Unsubscribed To list. This will add them to the suppression-type unsubscription target list for the newsletter campaign, which will prevent the target from receiving the newsletter. Please note that the target will not be removed from the campaign's default target list.




5. Click "Save" to preserve your changes.

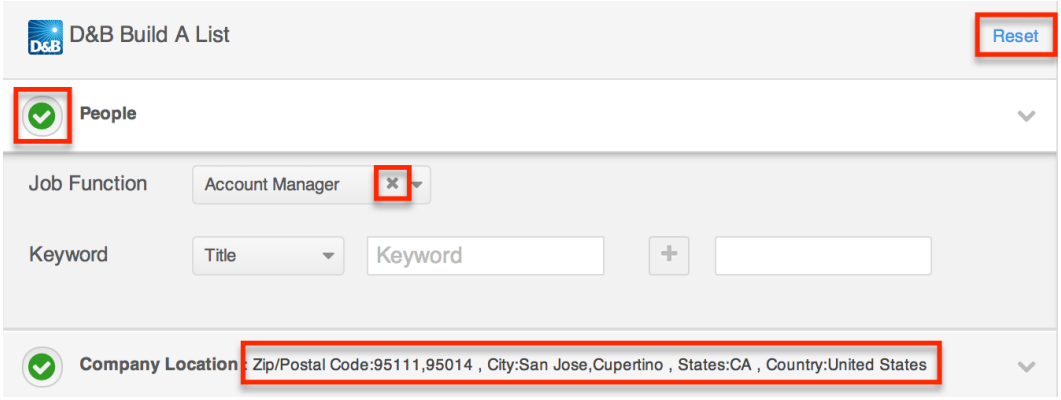
## D&B Build A List

D&B's Build A List option allows you to create a list of individuals for import based on various search filter criteria (e.g. people, company location, industry, etc.). The individuals meeting your search criteria will be pulled from the D&B database and displayed in the intelligence pane to the right of the page. You can easily import and save any of the individuals in the list to Sugar by selecting the individual's name. You can select the people-type module (Contacts, Leads, Targets) to which you wish to import the individual by selecting the Import As option on the upper right of the D&B: Target Information dashlet. To build your list, simply click the triangle in the Targets module tab and select "Build A List". Please note that administrators must configure the D&B connector via Admin > Connectors before users can utilize the Build A List page to create filters, view, and import data into Sugar. For more information on enabling connectors, please refer to the Enabling Connectors section of the System documentation in the Administration guide.

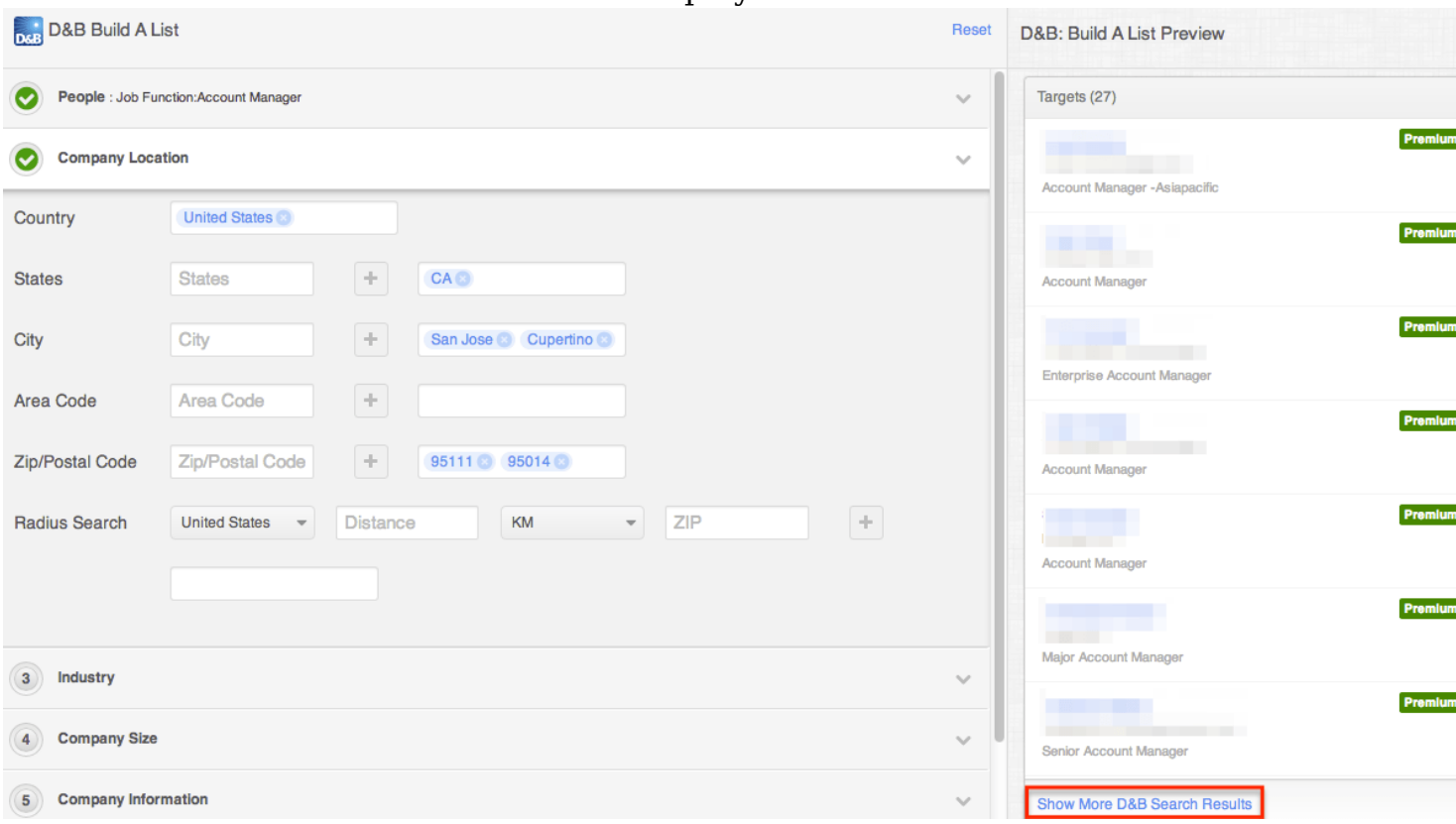



The D&B Build A List page will open displaying the various panels (e.g. People, Company Location, Industry, etc.) available to create your filter criteria. Once you enter in at least one filter criteria in the corresponding panels, the panel will display a check mark to the left of the header. The panel you are currently viewing (e.g. People) will collapse as you open up a different panel (e.g. Company Location) on the page. Each collapsed panel will display a summary of filters (if applicable)

created for the search. You can remove any unnecessary filter values by clicking the "x" to the right of the specific value or clicking "Reset" on the upper right of the page to clear all filters.

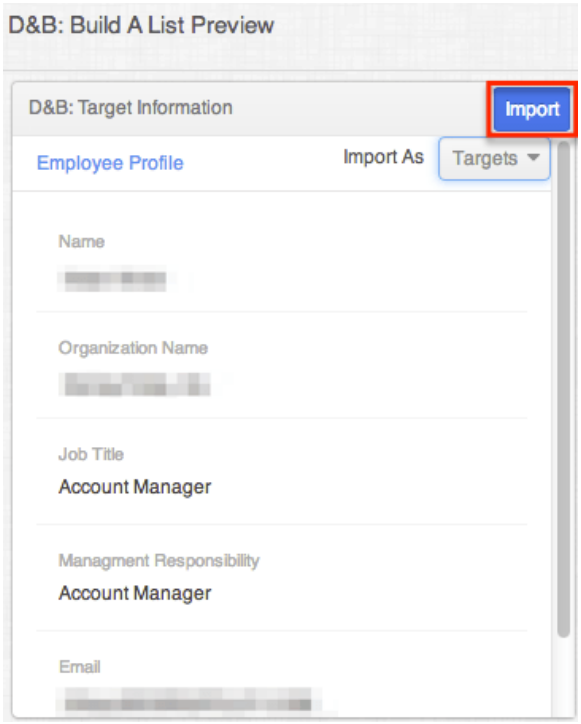



The D&B: Build A List Preview dashboard to the right of the page will display search results in real time as you enter in the various search filter criteria. Only individuals meeting all of the search criteria across all panels on the D&B Build A List page will be included in the search results. The first ten matching individuals will display in the Targets dashlet, and you can click "Show More D&B Search Results" at the bottom of the dashlet to display the other individuals.




To import an individual, simply select the appropriate individual's name in the Targets dashlet and their key information (e.g. name, title, etc.) will display in the D&B: Target Information dashlet. To return back to the previous search results, simply click "Back To D&B Contacts List" at the bottom of the D&B: Target

Information dashlet. To import the individual's data into Sugar, click the Import button on the upper right of the dashlet. The individual's data will appear in the corresponding Sugar fields in the target's record view. In addition, the D&B Principal ID number associated to the individual in D&B will be populated automatically in the D&B Principal ID field of the target's record view. The D&B Principal ID is used to identify the individual and detect duplicate records, so any record(s) in the dashlet detected as a duplicate of an existing record in Sugar will display "Duplicate" to the right of the individual's name. Sugar will also display any duplicate record(s) detected based on the D&B Principal ID when attempting to save the record.

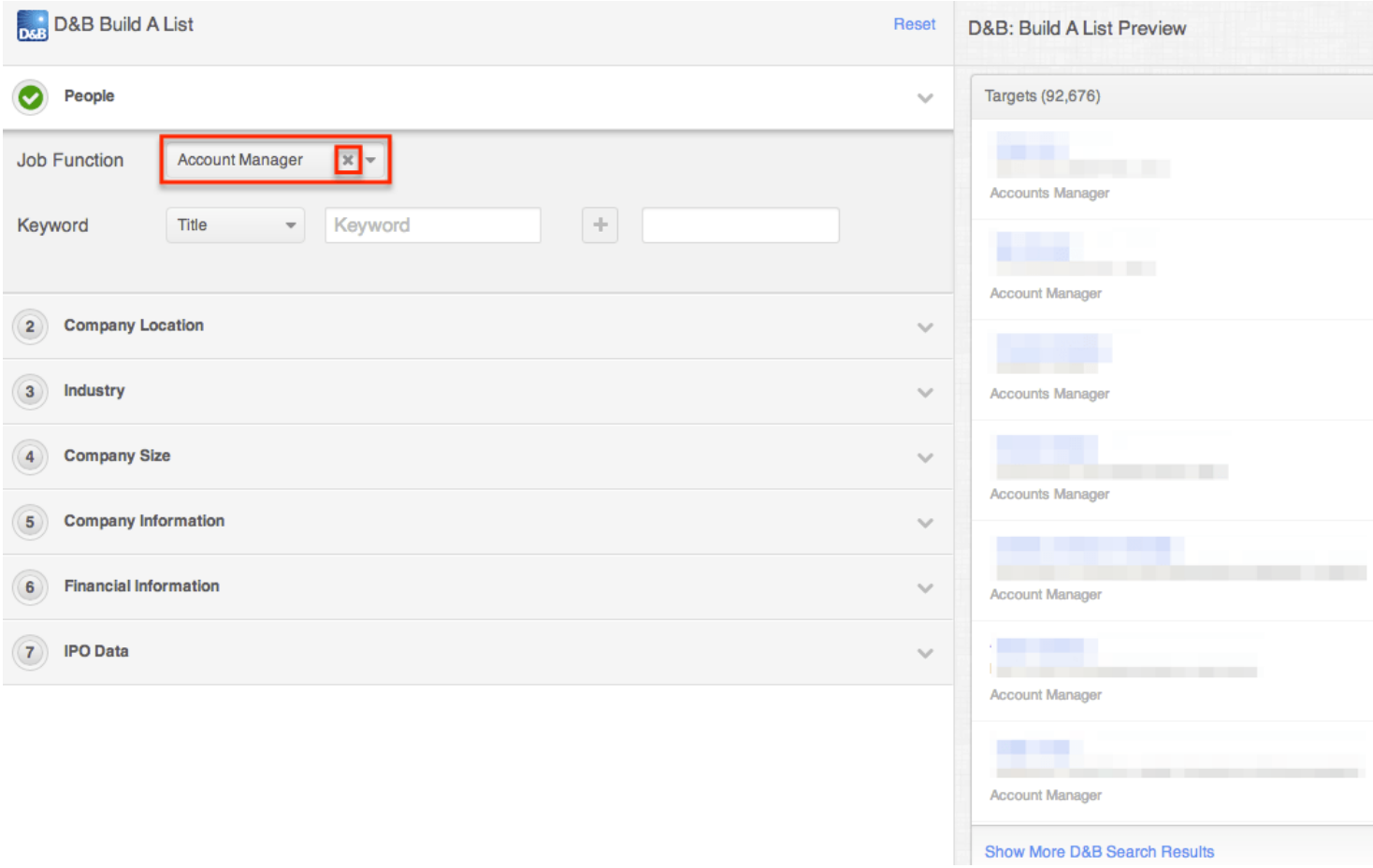



Please note that if the selected individual is detected as a duplicate of an existing Sugar record, the duplicate record(s) will appear within the record view upon save, but you can click "Ignore Duplicate and Save" if you wish to proceed with creating the record. You can also choose to view and edit the duplicate record's details by clicking "Select and edit" in the panel. Please note that each individual will need to be imported one at a time. Once the individual is imported to Sugar, you will be taken back to the Build A List page where your search filter criteria are still preserved and you can select other individuals to import from the results list.

## People Filter Panel

By default, the People panel is open at the top of the page and you can select a specific job function as well as enter a keyword based on the individual's title, biography, or both to pull up a matching list based on these criteria. As you select a job function or enter in a keyword, the list of individuals meeting the criteria will start displaying in the Targets dashlet. You can remove any unnecessary filter

values by clicking the "x" to the right of the value(s). The D&B: Build A List Preview dashboard will display the search results in real time as you enter in your search criteria.



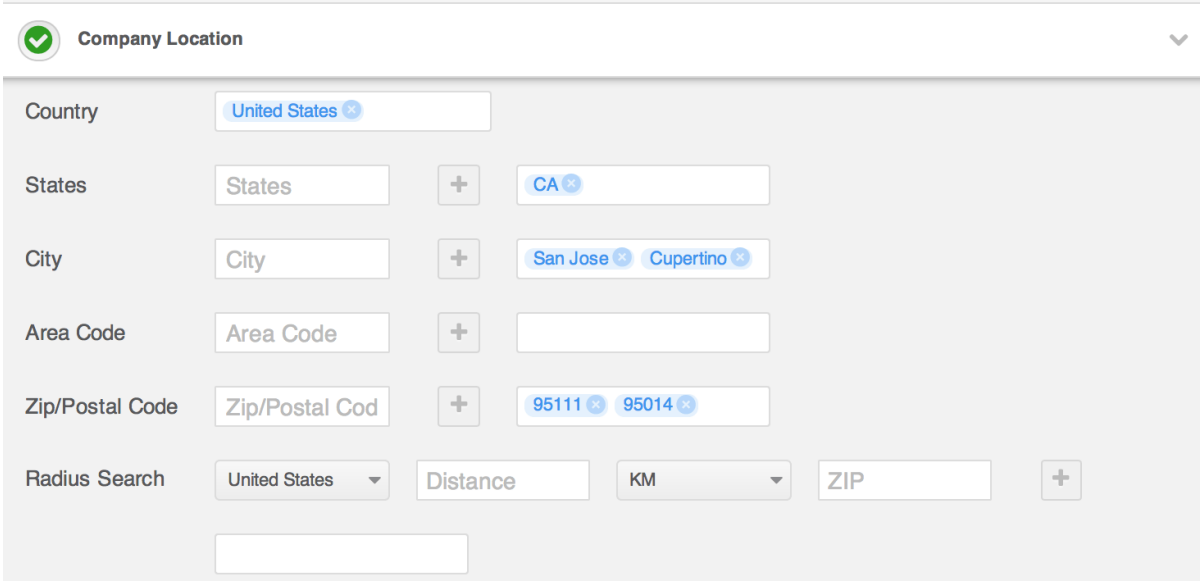

## Company Location Filter Panel

The Company Location panel allows you to enter search filters specific to a company's location (e.g. country, state, city, area code, etc.) in order to pull up individuals related to the company meeting the criteria. When creating the filter, you can either select a value from the dropdown list (e.g. Country) or enter in a value in the open text box (e.g. City) to add the filter to your search. For example, you can select a country from the dropdown list by clicking in the open text box or begin typing a keyword then select the matching value in the list. You can add more than one value to this field by clicking in the box again to pull up the dropdown list or entering a value then selecting from the list.

When entering in a value for the City field, you must click the Plus icon to the right of the open text box in order to have the filter applied to your search. You also have the option to add multiple values to the same filter criteria by entering the new value and clicking the Plus icon to add it to the list. You can also define a Radius Search criteria for either United States or Canada based on a specific

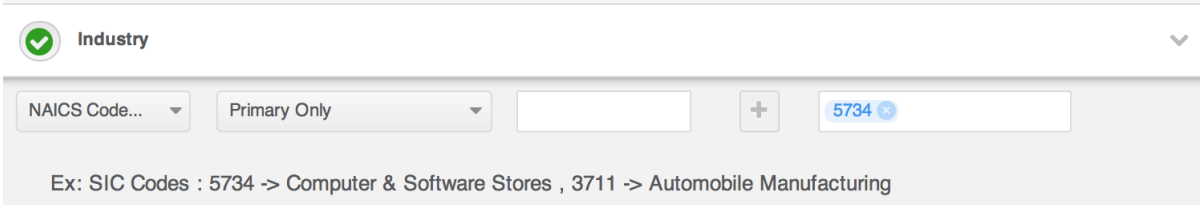
distance from a certain zip code.

If you have the specific list of individuals you wish to import into Sugar based on the related company's location, you can simply select the appropriate individual (e.g. John Smith) in the search results list and their key information (e.g. name, job title, email, etc.) will display in the D&B: Target Information dashlet. Please note that each individual will need to be imported one-at-a-time. If you wish to apply additional filter criteria, please proceed to the other panels on the page.




## Industry Filter Panel

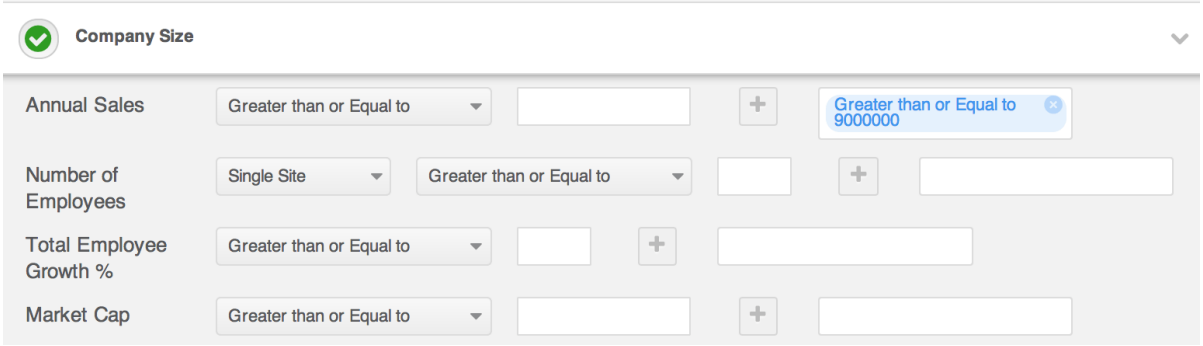
The Industry panel allows you to create a filter based on the NAICS Code or SIC Code of the company. You can select either "Primary Only" or "Primary and Secondary" as the corresponding condition from the dropdown list to the right. In the open text box, enter the appropriate SIC or NAICS code. Once you enter in the appropriate code (e.g. 5734), click the Plus icon to apply this specific code to your D&B search. The D&B: Build A List Preview dashboard will re-build the results list to display the individuals related to the companies meeting all of the filter criteria entered on the page.




## Company Size Filter Panel

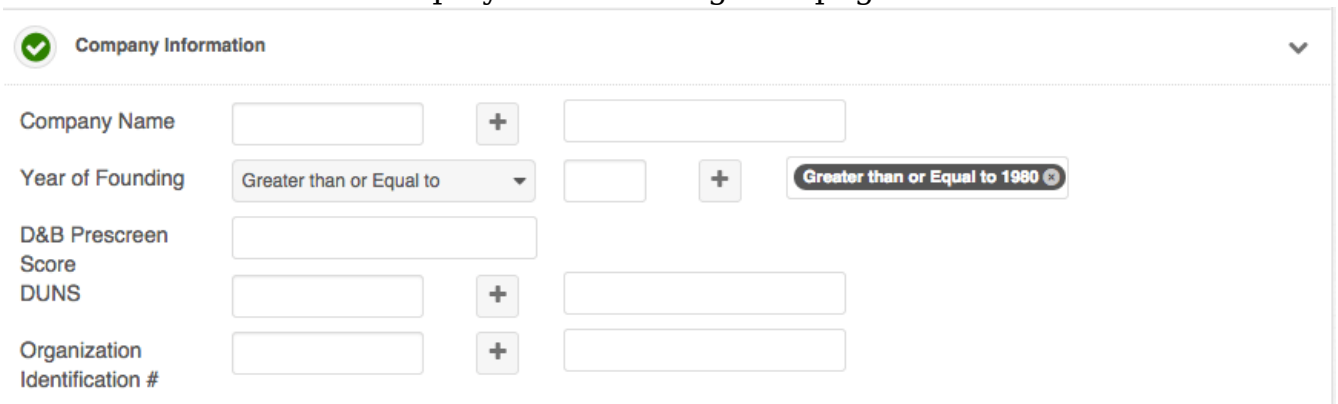
The Company Size panel provides filter options for annual sales, number of

employees, total employee growth percentage, and market cap. You have the ability to enter a range for values by selecting the Between option from the condition's dropdown list. The other conditions available to select are "Greater than or Equal to" and "Lesser than or Equal to". Click the Plus icon to add the values to the filter list to be applied to your Build A List search.




## Company Information Filter Panel

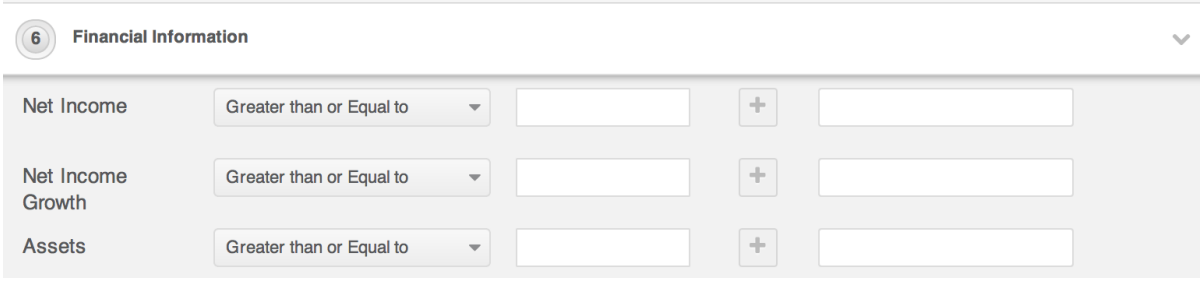
The Company Information panel enables you to filter based on the company's name, year of founding, D&B prescreen score, DUNS number, and organization identification number. To filter your search based on company name, simply enter in the keyword then click the Plus icon to add the filter criteria. You can choose to enter in a range for the year of founding by selecting the Between condition. You can also filter based on the organization's associated credit risk level by selecting "Low", "Medium", or "High" in the D&B Prescreen Score field. The specific 9-digit DUNS number for the company(s) can be entered in the DUNS field if you have that information. For more information regarding the DUNS number, please refer to the D&B Dashlets section of the Intelligence Pane documentation. If you have a specific organization identification number you wish to filter the search by, you can enter that value as well. The individuals related to the companies meeting all of the filter criteria will display in the intelligence page.




## Financial Information Filter Panel

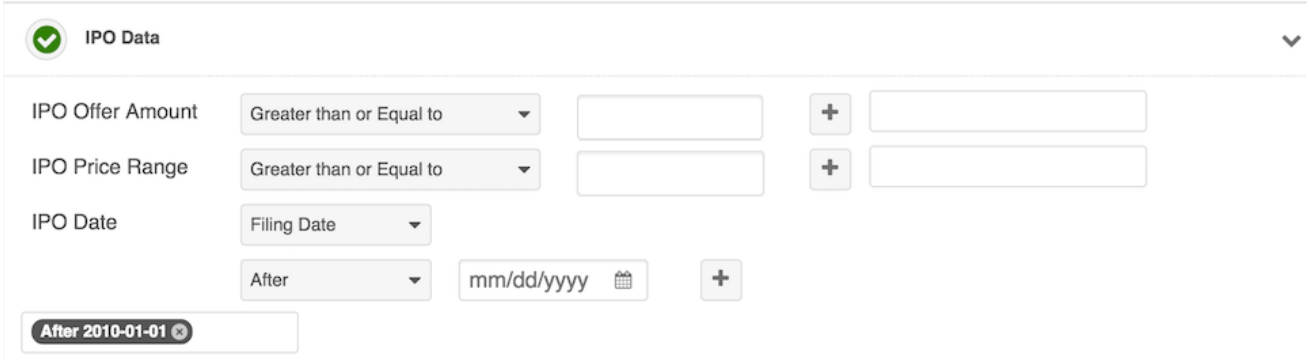
The Financial Information panel allows you to narrow your search further by

specifying the company's net income, net income growth, or asset values you wish to include in the filter. The conditions available to choose are "Greater than or Equal to", "Lesser than or Equal to", and "Between".




## IPO Data Filter Panel

The IPO Data panel includes the IPO Offer Amount and IPO Price Range filter options where you can enter the appropriate offering amount or price range of each share offered for the company. The conditions available to choose are "Greater than or Equal to", "Between", etc. In addition, you can filter based on the IPO date (Filing Date, Trading Date) by selecting the condition (e.g. After), choosing the date, then clicking the Plus icon.




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# Target Lists

## Overview

A target list consists of a collection of individuals or organizations you want to include or exclude in a mass marketing campaign. Target Lists can contain any number and any combination of Targets, Contacts, Leads, Users, and Accounts. Targets can be grouped into a target list according to a set of predetermined criteria such as age group, geographic location, or spending habits. Target lists are used in mass email marketing campaigns that can be configured in the Campaigns module. For more information regarding creating campaigns, please refer to the

Campaigns documentation. This documentation will go over the basics of the Target Lists module as well as the various actions and options available from within the module.

## Target Lists Fields

The Target Lists module contains a number of stock fields, which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.

| Field | Description |
|---|---|
| Assigned To | The Sugar user assigned to the target list |
| Date Created | The date the target list record was created |
| Date Modified | The date the target list record was last modified |
| Description | A description or other information about the target list |
| Name | The name or designation of the target list |
| Teams | The Sugar team(s) assigned to the target list |
| Total Entries | The total count of records (contacts, leads, targets, users, and accounts) belonging to a target list. This number will update automatically and cannot be edited manually.<br>Note: You must refresh the record view page to update the Total Entries field after adding records to the target list. |
| Type | The type of the target list (e.g. default, test, etc.) |
| Domain Name | The name of the domain to exclude from the campaign recipient list (e.g. "example.com")<br><br>All email addresses containing the domain name will not receive the campaign email. |

| | |
|---|---|
| | Note: This field only displays when "Suppression List - By Domain" is selected for the Type field. |

## Target List Types

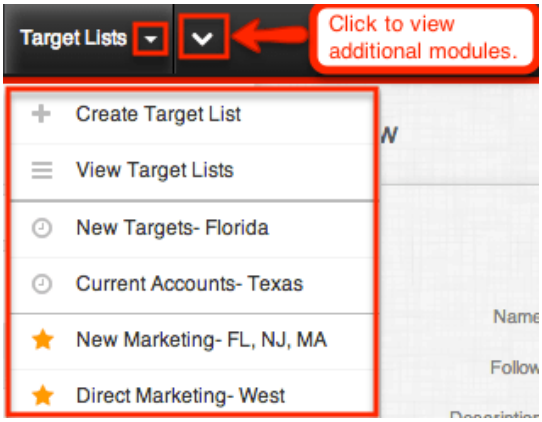
A target list can specify individuals or organization who need to be included in a campaign or excluded from a campaign. This can be controlled using the following target list types:

| Target List Type | Description |
|---|---|
| Default | A list of people who are the primary recipients of the campaign email |
| Seed | A list of people who need to receive the campaign email but not be tracked in the campaign statistics<br><br>Note: This list is typically used for internal purposes where the individuals in this group need to approve the campaign before it is launched. The seed list is ignored in the campaign's View Status page. |
| Suppression List - By Domain | A list of people who should be excluded from the campaign email recipient list and whose email addresses share a common domain name, such as "website.com"<br><br>Note: Suppression by domain can be used to prevent marketing to entire organizations such as competitors. |
| Suppression List - By Email Address | A list of people who should be excluded from the campaign email recipient list<br><br>Note: This list typically consists of people who chose to opt out from receiving your campaign message. |
| Suppression List - By Id | A list of people who should be excluded from a Newsletter-type campaign email recipient list |

| | |
|---|---|
| | Note: The "Suppression List - By Id" must be related to the Newsletter campaign in order for the message's opt-out link to function properly. |
| Test | A list of people who receive test email campaigns to make sure that the message's layout is displayed properly before the campaign is finalized and sent to the default list<br><br>Note: A campaign may be sent to the test list multiple times by using the Delete Test Entries button on the View Status page between re-sends. |

## Target Lists Module Tab

The Target Lists module tab is typically found by clicking the arrow to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Target List" to access the list view. Once the Target Lists tab displays on the navigation bar, you can click the triangle within the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of target lists you last viewed in the module. The Favorites menu displays the list of target lists you most recently marked as favorites in the module.




The options in the Actions menu allow you to perform the following types of action:

| Menu Item | Description |
|---|---|
| Create Target List | Opens the record view layout to create a new target list |
| View Target Lists | Opens the list view layout to search and |

| | |
|---|---|
| | display target lists |

If you do not see the Target Lists module tab in Sugar, please check the following:

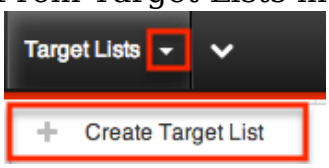
- The Target Lists module may be marked as hidden in your user preferences, which will prevent it from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Target Lists module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Target Lists module for your entire Sugar instance. Reach out to your Sugar administrator to have the Target Lists module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

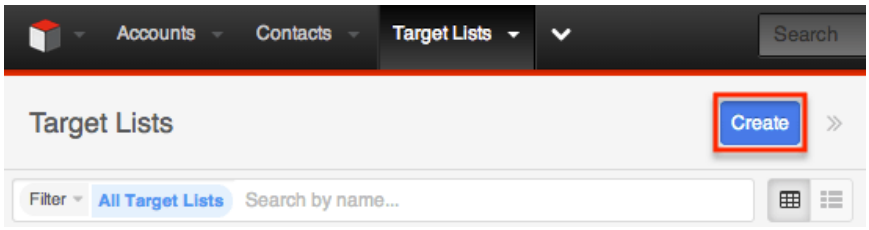
## Creating Target Lists

There are various methods for creating target lists in Sugar including via the Target Lists module, duplication, importing of targets, and from the list view of other modules (e.g. Contacts, Accounts, etc.). The full record view layout opens when creating the target lists and includes all of the relevant fields for your organization's target lists.

### Creating Via Target Lists Module

One of the most common methods of target list creation is via the Create Target List option in the Target Lists module tab. This opens up the record view layout which allows you to enter in all the relevant information for the target list.
Use the following steps to create a target list via the Target Lists module:

1. Click the triangle in the Target Lists module tab to open the actions menu and select "Create Target List". You can also click the Create button on the upper right of the Target Lists list view.
   From Target Lists module tab:
   
   
   From Target Lists list view:




2. Enter appropriate values for the fields in the record view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".
    - Please note that you can also click the Actions Menu to the right of the Save button to select the "Save and view" or "Save and create new" options. Save and view will display the record's details after the save is complete. The Save and create new option saves the current record and opens a new, blank record view in edit mode where the user can create another record




You can now add records from the Accounts, Contacts, Leads, Users, and Targets module to your newly created target list. For more information on how to populate a target list, please refer to the Populating Target Lists section of this documentation.

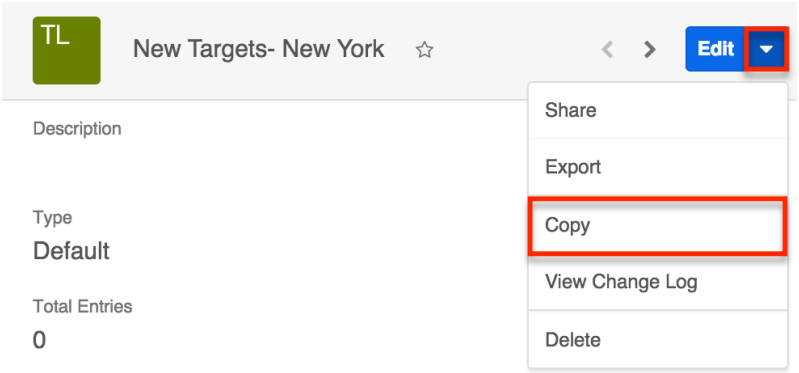
Please note that you can also create or select an existing target list from a Campaign's record view via the Target List subpanel. This will launch the same record view mentioned above for creating a target list. For more information on how to select a target list from a campaign, please refer to the Campaigns documentation.

## Creating Via Duplication

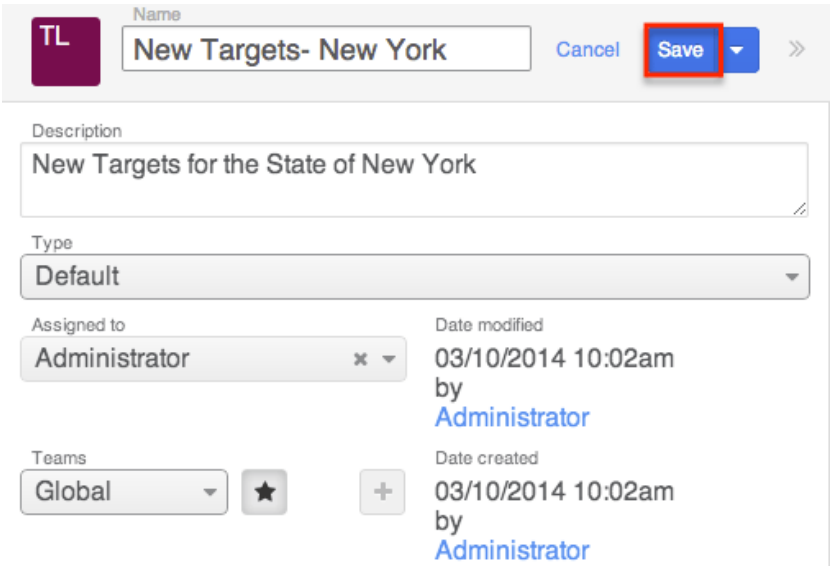
You can also create a new target list by duplicating an existing target list record. The Copy option is useful if the target list you are creating has similar information to an existing target list since you have less new data to enter. A major advantage to creating a target list via duplication is that the related records on the original target list will also be related to the newly created target list.
Use the following steps to create a target list by duplicating an existing target list record:

1. Navigate to a target list's record view.

2. Click the Actions menu and select "Copy".




3. The displayed record view is pre-populated with the original target list's values and recipient (Accounts, Leads, Contacts, Targets, and Users) relationships. Update the necessary fields, then click "Save".
    - Please note that you can also click the Actions Menu to the right of the Save button to select the "Save and view" or "Save and create new" options. Save and view will display the record's details after the save is complete. The Save and create new option saves the current record and opens a new, blank record view in edit mode where the user can create another record.

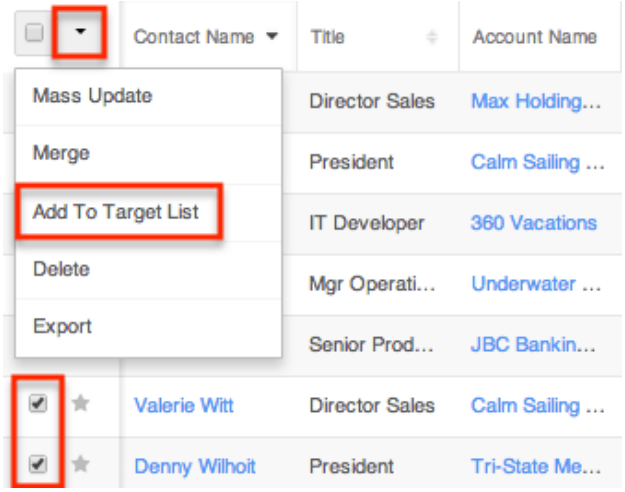



## Creating Via Importing Targets

The Target Lists module does not have an import option, but you can import targets via the Targets module. While performing the import, users have the option to add the targets to a target list. For more information on how to create a new target list while importing targets, please refer to the Populating Via Importing Targets section of this documentation.

## Creating Via Module List View

Sugar gives users the ability to create or update a target list from the Accounts, Contacts, Leads, and Targets list view. In order to add additional records to the target list, simply select the records in the modules list view (Accounts, Contacts, Leads, Targets) then click "Add to Target List" under the Actions menu. For more information on how to create or update a target list from a module's list view, please refer to the Populating Via Module List View section of this documentation.




## Viewing Target Lists

There are various options available for viewing target list records in Sugar including via Target Lists list view, Target Lists record view, and Target Lists Recently Viewed menu. Please note that you will only be able to see target list records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

### Viewing Via List View

The Target Lists list view displays all target list records meeting the current search criteria. To access the list view, simply click the Target Lists module tab. While list view shows key target list fields, you can click the target list's name to open the record view. For more information on viewing target lists via list view, please refer to the Target Lists List View section of this documentation.

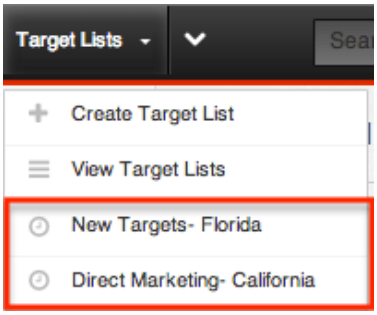
### Viewing Via Record View

The Target Lists record view displays thorough target list information including all target list fields followed by subpanels of the target list's related records belonging to various modules. Users can also view the Intelligence Pane to the right of the

record's details which allows users to add and view various dashlets that provide valuable data. For more information regarding the Intelligence Pane, please refer to the Intelligence Pane section of this documentation. The record view can be reached by clicking a target list record's link from anywhere in the application including from the Target Lists list view. For more information on viewing target lists via the record view, please refer to the Target Lists Record View section of this documentation.

### Viewing Via Recently Viewed

As you work, Sugar will keep track of which target lists you have recently viewed. Click the Actions menu in the Target Lists module tab to see a list of your most recently viewed target lists and click each name to open the Target lists record view.




## Searching Target Lists

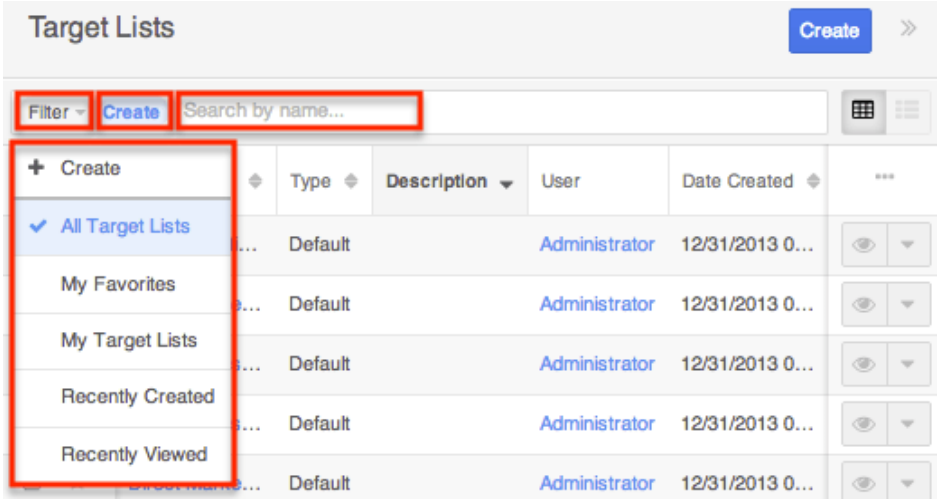
The Target Lists list view includes a module search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Target Lists list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Global Search is disabled for the Target Lists module by default and must be enabled via Admin > Search. For more information on how to enable and disable modules for Global Search, please refer to the Systems documentation in the Administration guide.

Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends. For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

## Module Search

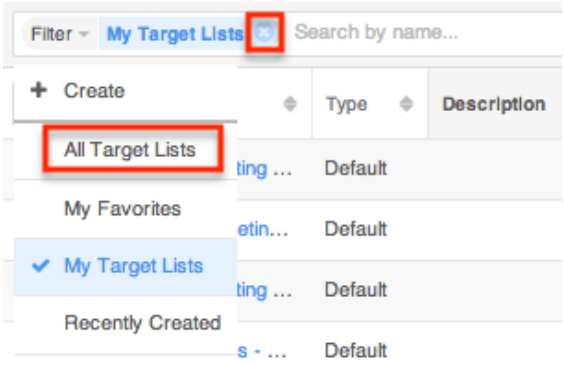
Module search enables users to easily search by name within the Target Lists module and pull up matching records in the list view. The search also provides a Filter option which can be used in combination with the open Search box to narrow your search further using the available options as follows:

- Create : Create a new custom filter which you can use to filter your search
  - Note: You can also click "Create" to the right of the Filter option.
- All Target Lists : Returns all records in the module to which you have access
- My Favorites : Returns only records you have marked as favorites
- My Target Lists : Returns only records assigned to you
- Recently Created : Returns only records you created in the module within the last 7 days
- Recently Viewed : Returns only records you have viewed in the module within the last 7 days




When you choose a filter, Sugar will return target lists which match both the selected filter and any name provided in the "Search by name..." bar in the filtered list view results. For example, if you select "My Target Lists" in the Filter options and enter a target list name, Sugar will only return target lists with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search bar. To see all target list records to which you have access, simply select the All Target Lists option in the filter and remove any text from the search bar. You can also click the Clear icon within the selected filter option (e.g. My Target Lists) in the Search bar to clear the filter and pull up all list view search results. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when

navigating away.




Please note that you will only be able to see target list records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

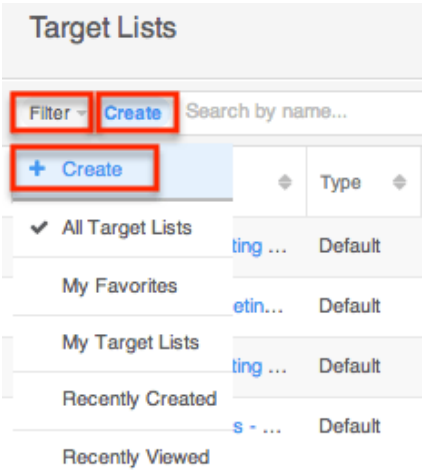
## Creating a Filter

Users can also create new filters via the Create option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the Target Lists list view. You have the option to add multiple fields to your new filter by clicking the Plus button to the right of the filter selection dropdown lists and set select operators along with their value(s). A filter's criteria need to be true for a record in order for it to appear in the list view search result. Additionally, filters with no specified values may be saved as a custom filter to act as a filter template when a user often searches using the same fields but with varying values. Please note that only fields you have view access for will appear in the Filter list when creating a search filter.

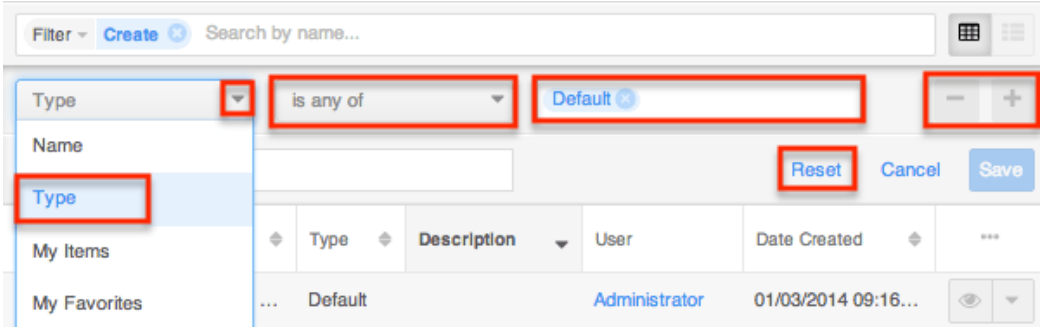
When you run a search using a created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.

The following steps cover creating a new Type filter as an example:

1. Click the Filter option on the Target Lists search bar then select "Create".
    - You can also click "Create" to the right of the Filter option.




2. Select the field you wish to add to your filter as well as the condition and matching criteria.
    - Note: Only fields you have view access for will be available to add in the Filter list.
3. To add additional fields to the new filter, click the Plus button to the right of the filter.
    - To remove fields from the new filter, click the Minus button to the right of the filter.
    - To clear any filter values (e.g. Default), simply click the "x" to the right of the value or select "Reset" to the left of the Save button.




The list view will automatically display results matching your filters as you create and modify the criteria.

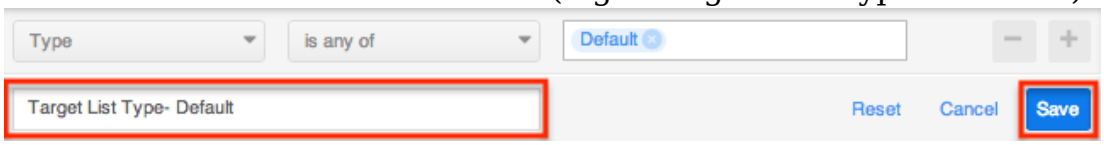
## Saving a Filter

Saving a filter will preserve the chosen fields as well as the condition(s) of the matching value(s). Additionally, it will allow users to easily select previously created and saved filters from the Filter options.

The following steps cover saving a new search by Name filter as an example:

1. Create a new filter to perform a search on your desired fields.

2. Enter in a name for the new filter (e.g. "Target List Type- Default").




3. Click "Save" to add this filter to the module's Filter options.

## Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search is used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.




To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. For more information on using and configuring Global Search, please refer to the Global Search sectionof the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

# Populating Target Lists

A target list consists of a group of individuals or organizations (e.g. targets, contacts, accounts, etc.) you wish to be included or excluded on a mass marketing campaign. These targets are typically identified based on a set of predetermined criteria such as being a prospect or existing customer, age group, industry, etc. There are various ways to populate a target list in Sugar including using the Add to

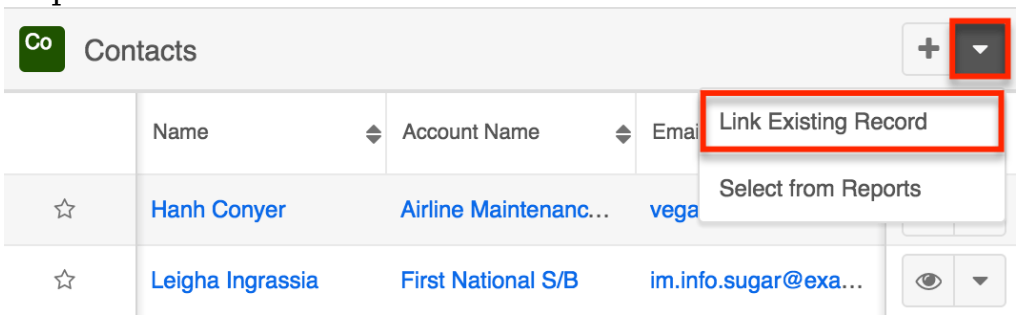
Target List option from a module's list view, selecting records from the subpanel in the Target Lists record view, etc. You can use the Select All feature in the module's list view when adding to a target list, which will allow you to easily select the first 1000 records in the result set. If you wish to add more than 1000 records or add a specific group of records to the target list, please use the filter option in module search to perform the additions in smaller batches.

Please note that 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 which are considered duplicates will be suppressed even though they are not on the opt-out list.

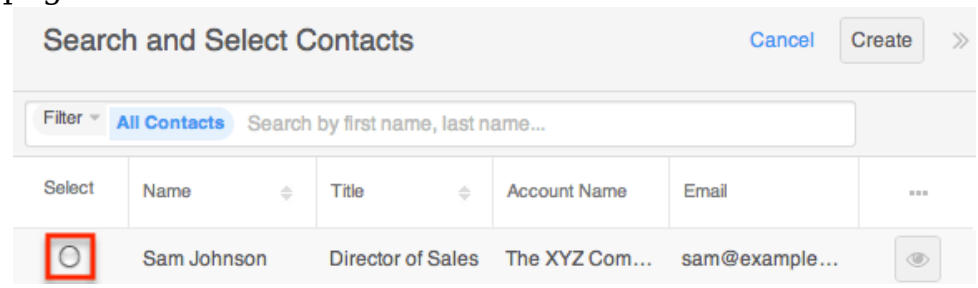
## Populating Via Individual Selection

The record view of each target list will display the Targets, Contacts, Leads, Users, and Accounts subpanels. Users have the option to select and add the desired targets directly via these subpanels.
The following steps cover populating a target list with contacts via the Target Lists record view as an example:

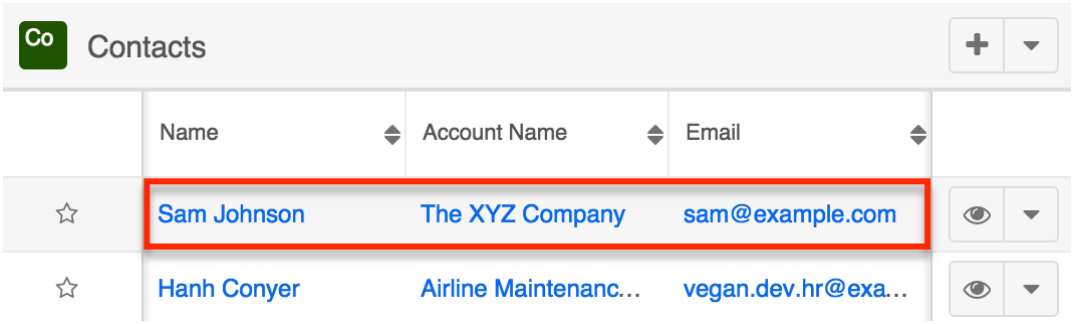
1. Navigate to a target list's record view.
2. Scroll to the Contacts subpanel and choose "Link Existing Record" from the subpanel's Action menu.




3. Locate and select the desired record from the Search and Select Contacts page.



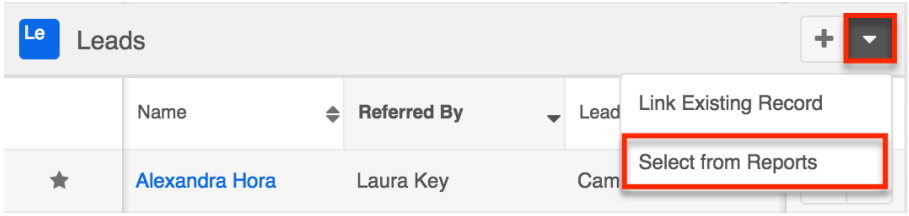

Once the contact's have been selected, you will see the records within the Contacts subpanel of your target list's record view.



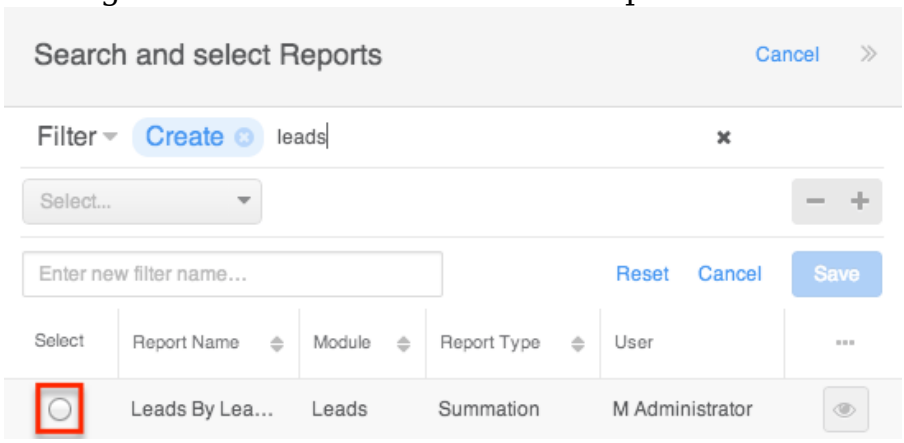

## Populating Via Reports

The record view of each target list will display the targets, contacts, leads, users, and accounts subpanels. You can select and add the desired targets from an existing report directly to the target list via these subpanels.
The following steps cover populating a target list by selecting a report based on the Leads module as an example:

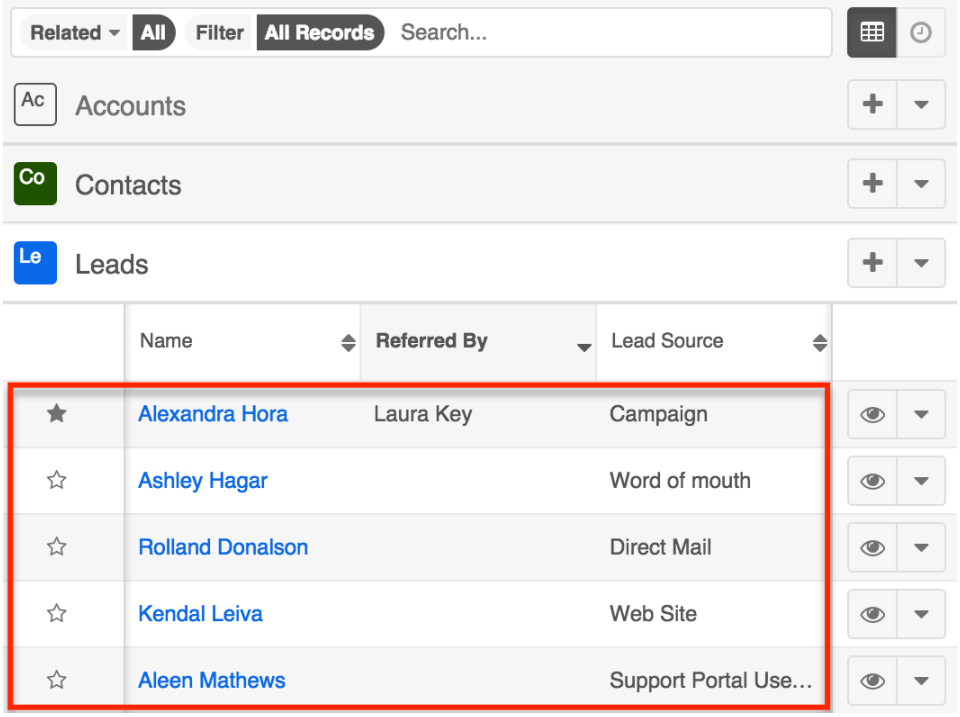
1. Navigate to a target list's record view.
2. Scroll to the Leads subpanel and choose "Select From Reports" from the subpanel's Action menu.




3. In the Reports popup list view, you will see the list of reports based on the Leads module. Select the report you would like to add to the target list by clicking the radio button next to the report's name.



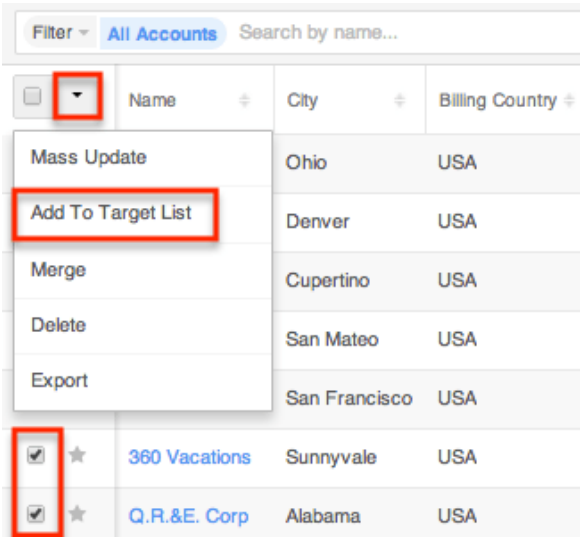

Once the report has been selected, you will see the lead records from the report results within the Leads subpanel of your target list. To add more records via this process, just select another report.



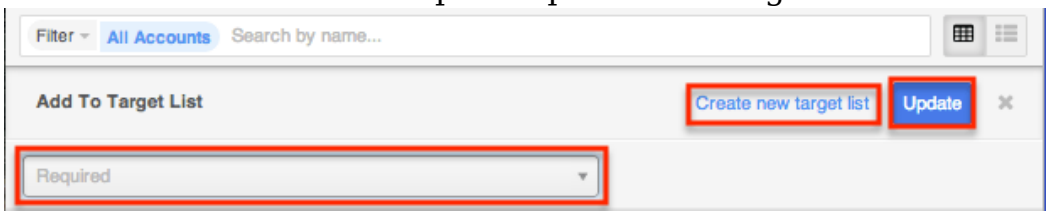

## Populating Via Module List View

You can select records directly from the Accounts, Contacts, Leads, and Targets list views to add them to a target list.
The following steps cover populating a target list by selecting records from the Accounts list view as an example:

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the Module Search to find the Account record(s) you wish to add.
3. Select the desired account record(s) then choose "Add to Target List" from the Actions menu.

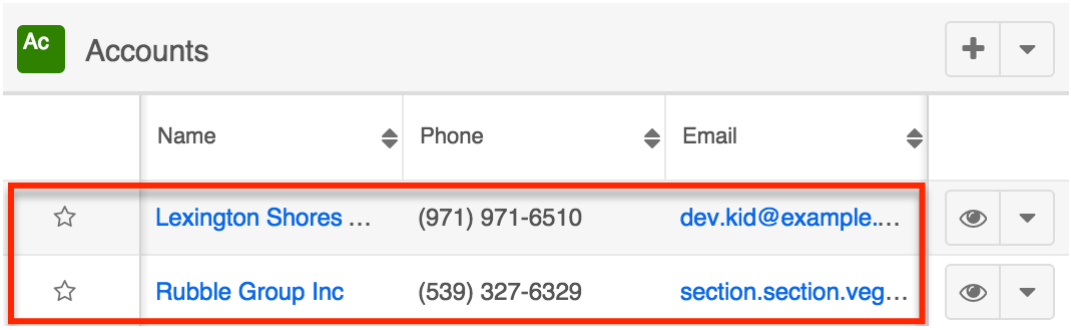


4. The Add To Target List panel will appear below the search bar. Search and select the desired target list from thedropdown list or create a new target list by clicking "Create new target list".
    - If creating a new target list, enter appropriate values for the fields in the record view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.




5. Once the appropriate target list is selected or created, click "Update" to add the account records to the target list.

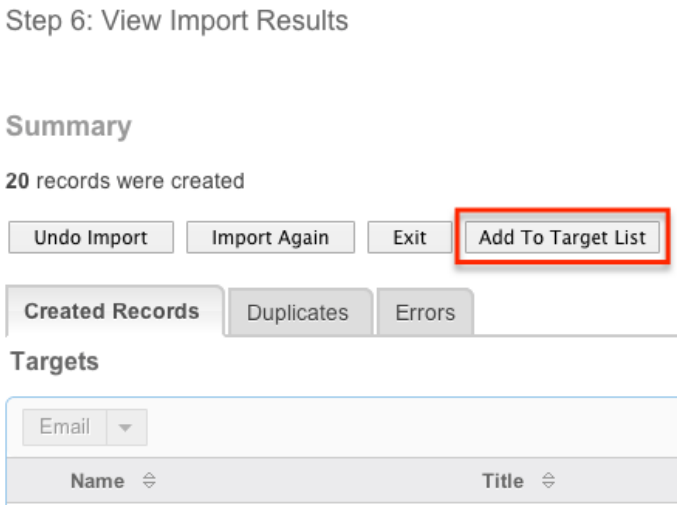
The selected account records will appear in the Accounts subpanel of the target list record.



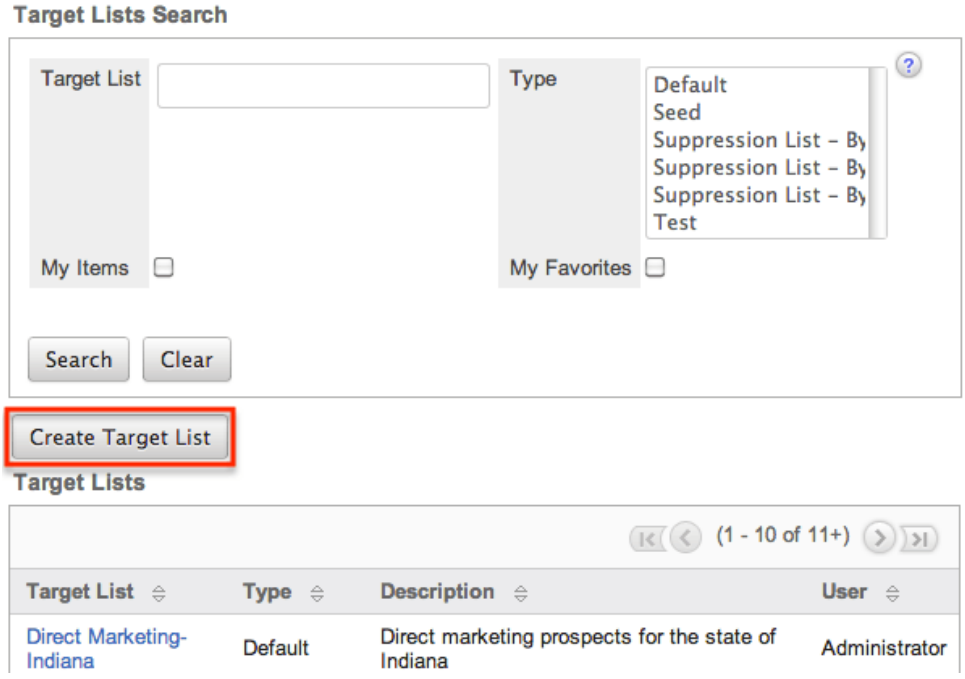

## Populating Via Importing Targets

The Target Lists module does not have an import option, but you can import targets via the Targets module. While performing the import, users have the option to add the targets to a target list. For more information on how to import records into Sugar, please refer to the Import documentation.
Use the following steps to populate a new or existing target list with newly imported targets:

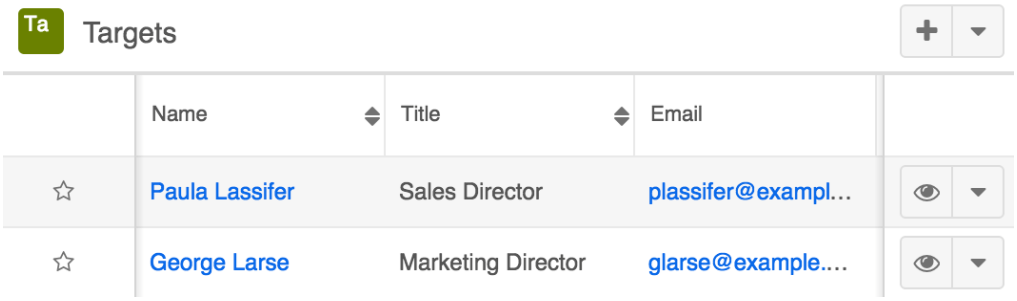
1. Click the triangle in the Targets module tab and select "Import Targets".
2. In Step 1, select the source of the data you are importing. Click "Next".
3. In Step 2, select the import file and choose "Create new records only". Click "Next".
4. In Step 3, confirm the import file properties. Click "Next".
5. In Step 4, confirm the field mappings for the import. Click "Next".
6. On Step 6 of the import process, click the Add to Target List button.




7. A popup window will open with the option to select an existing target list or create a new target list.
    - If adding to an existing target list, search and select the desired target list from the window.
    - If creating a new target list, enter appropriate values for the fields in the record view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.




Once the appropriate target list is selected or created, the newly imported targets will appear in the Targets subpanel of the target list record.

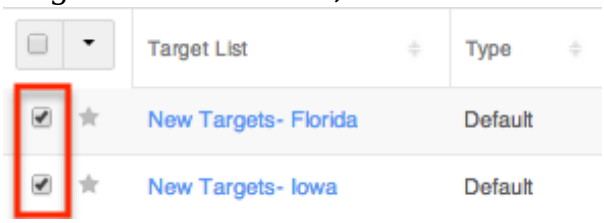



# Target Lists List View

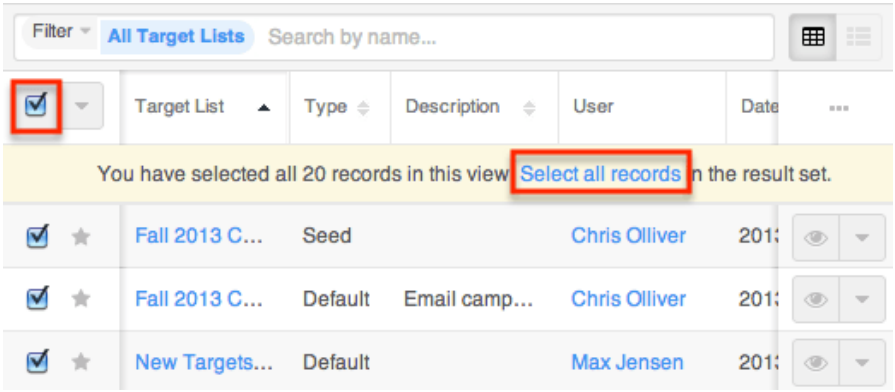
The Target Lists list view displays all target list records meeting the current search criteria to which your user has access. You can view the basic details of each target list within the field columns. Please note that you will only be able to see target list records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentations in the Administration guide.

## Checkbox Selection

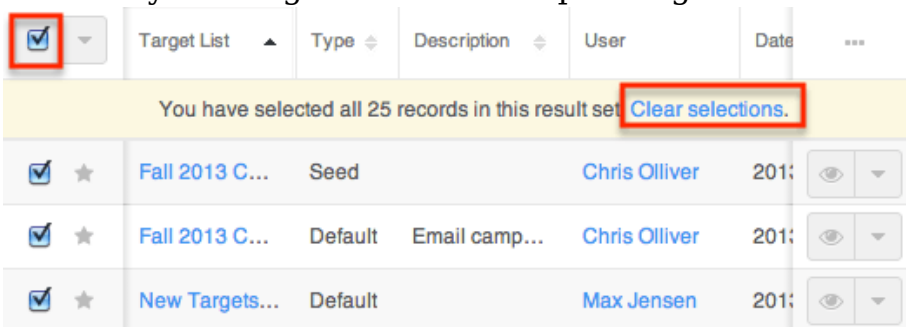
You can perform several actions on target list records directly from the list view by first selecting the desired records. To select individual target list records on the Target Lists list view, mark the checkbox on the left of each row.




To select all target lists records displayed on the current set of list view results, click the checkbox to the left of the Actions menu. A dialog will appear below the list view column headers indicating that you have selected all records on the list view's current results set (e.g. 20). To select all records in the Target Lists list view search results set, click "Select all records" in the dialog.

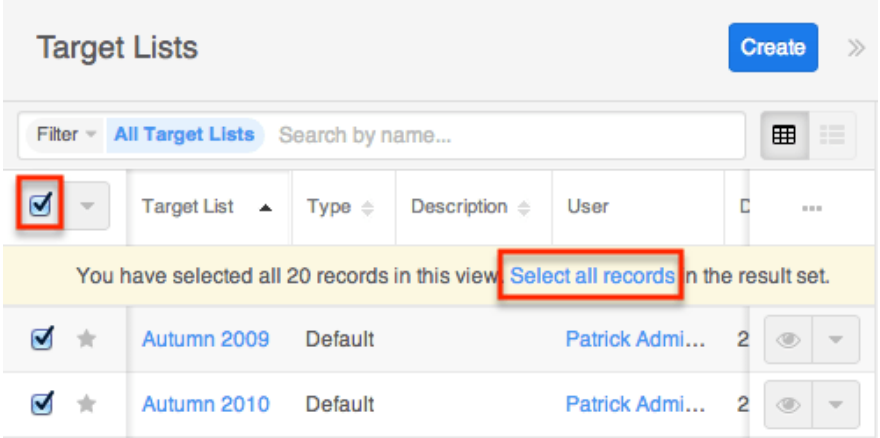



If you wish to clear the selection for all records on the list view result set, simply click "Clear selections" in the dialog. You can also clear the selections for all records by clicking the checkbox option again to remove the check marks.

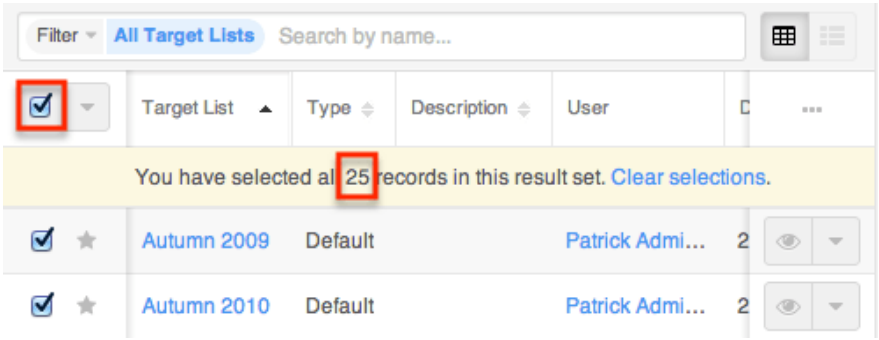



## Total Record Count

You can view the total record count on the Target Lists list view by selecting all records displayed on the current set of list view results. Once the records are selected, a dialog will appear allowing you to select all records in the results set.

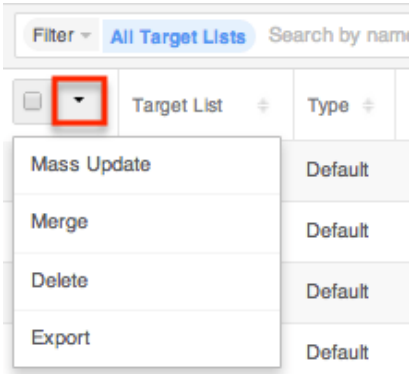



The total count of all records on the list view result set will appear in the dialog.




## Mass Actions Menu

The Mass Actions menu to the right of the checkbox option allows you to perform various actions on the currently selected records.



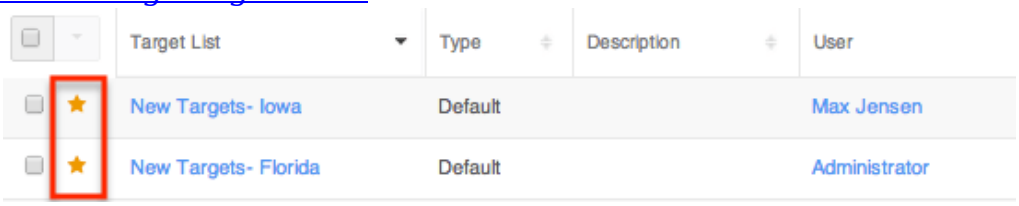

The options in the Mass Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Mass Update | Mass update one or more target lists at a time |
| Merge | Merge two or more duplicate target lists |
| Delete | Delete one or more target lists at a time |
| Export | Export one or more target lists to a CSV file |

## Favorite Designation

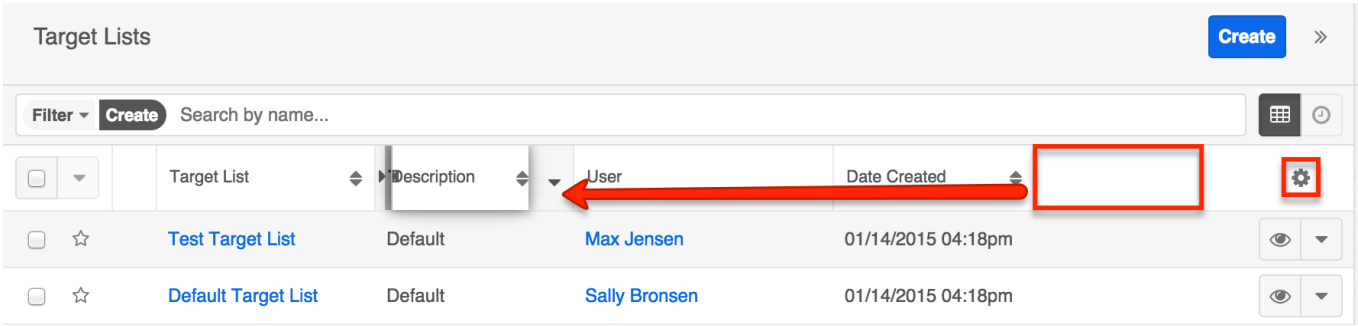
Users have the option to mark target list records as favorites via the list view as well as the record view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the Target Lists module tab. In the Target Lists list view, the star on the left of each target list's row is orange once marked to indicate a favorite target list.

For more information on how to mark records as favorites, please refer to the Favoriting Target Lists section of this documentation.



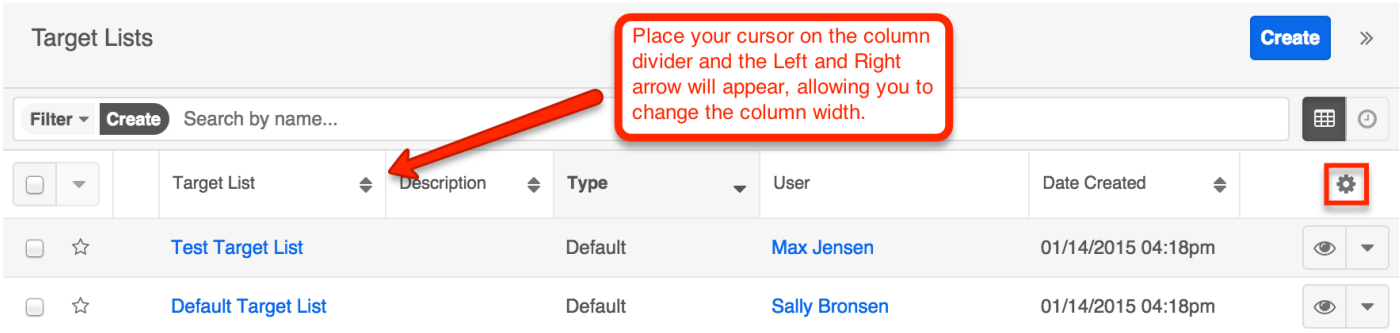

## Column Reordering

List view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the users browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the default column order.




## Column Resizing

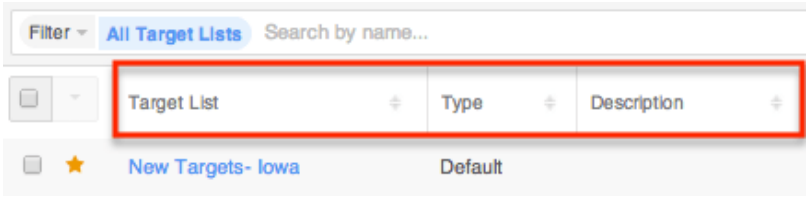
Users can easily adjust the size of columns in the Target Lists list view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the current list view is different from the default column width. Changes to the column width made by administrators in Studio are only respected if the user has not resized the specific column in the list view. The column size set by the user will supersede the default column width configured in Studio until the user resets the list view back to the default widths.




## Column Sorting

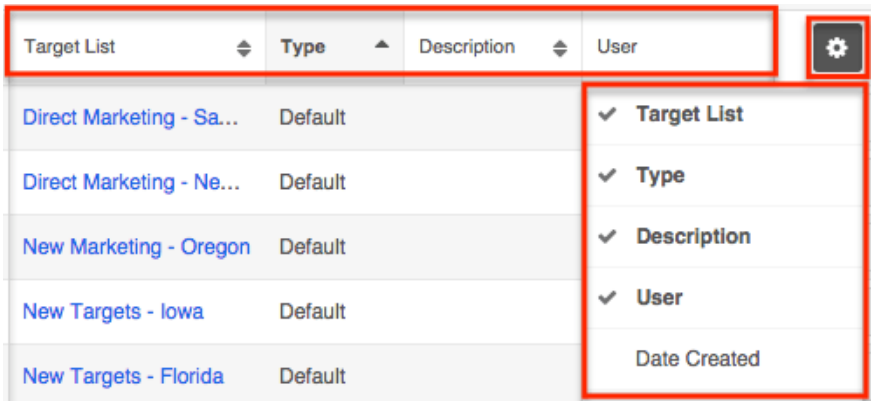
List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows.

Note: List views may only be sorted by one column at a time and cannot be sorted by custom relate fields.



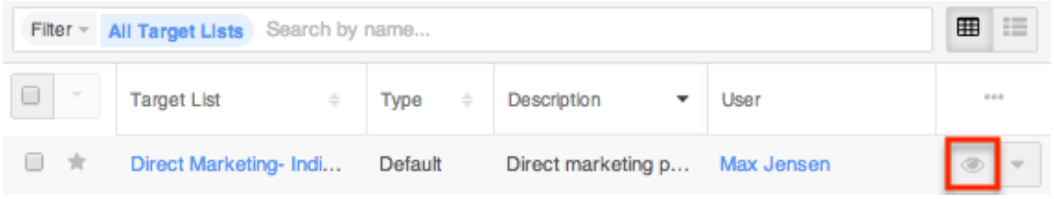

## Column Selection

Sugar gives users the ability to personalize the list view by specifying which fields they want to be displayed in the list view. You can click the Column Selection icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column on your list view.

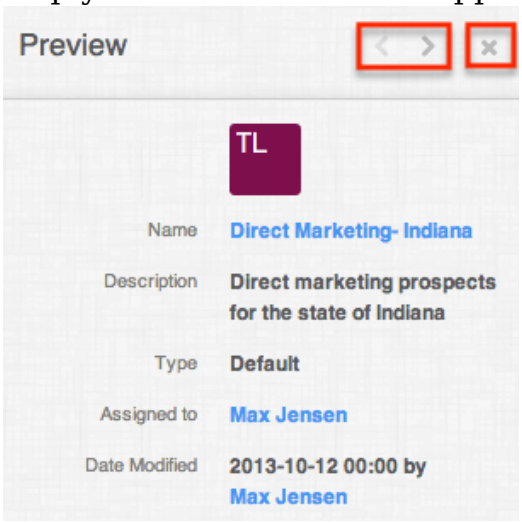


## Preview

Users can view a record's details directly from the Target Lists list view by clicking the Preview icon to the far right of each target list's row.

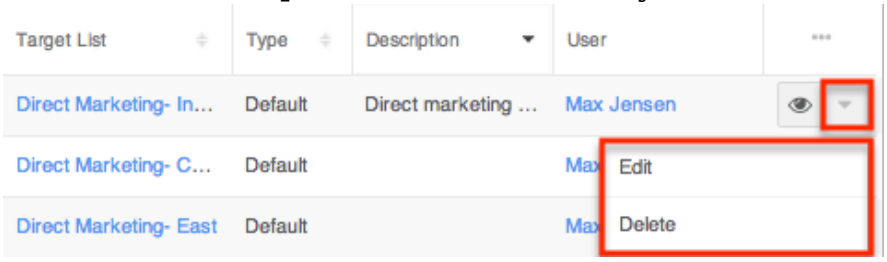



The record's data will display to the right of the list view providing key information regarding the record. On the upper right of the intelligence pane, there is a Left and Right arrow button that allows you to scroll through the list view's current search results by previewing the next or previous record. To close the preview, simply click the "X" on the upper right of the intelligence pane.




## Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to edit or delete specific records directly from the list view.



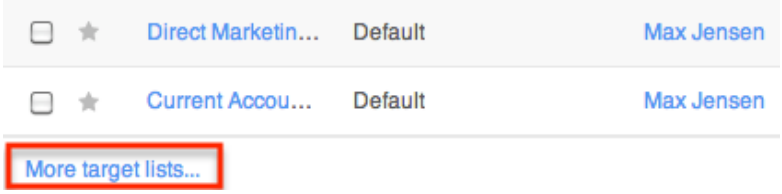

The options in the Record Actions menu allow you to perform the following operations:

| Menu Item | Description |
| --- | --- |
| | |

| | |
|---|---|
| Edit | Edit this target list |
| Delete | Delete this target list |

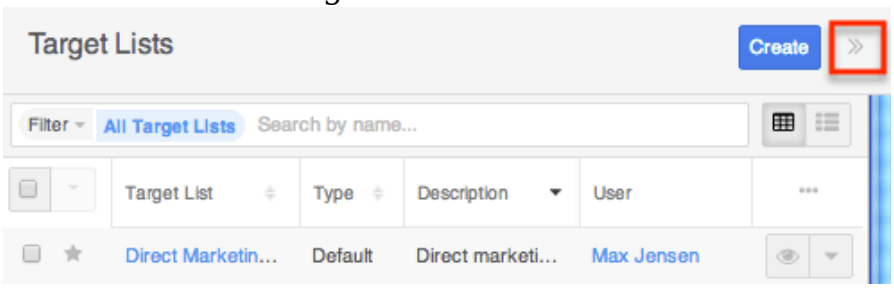
## More Target Lists

The list view loads an initial number of records meeting the current search criteria with the option to show additional results at the user's request. By default, Sugar displays 20 records per list view results set, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide. To load the next set of list view results, simply click the More Target Lists link at the bottom of the list view.




## Right Hand Side Drawer

On the upper right of the Target Lists list view there is a Double arrow icon which allows users to expand the list view to the full screen width. The intelligence pane to the right of the list view will be hidden when the list view is expanded. To reduce the list view's width and reveal the intelligence pane, simply click the Double arrow icon again.

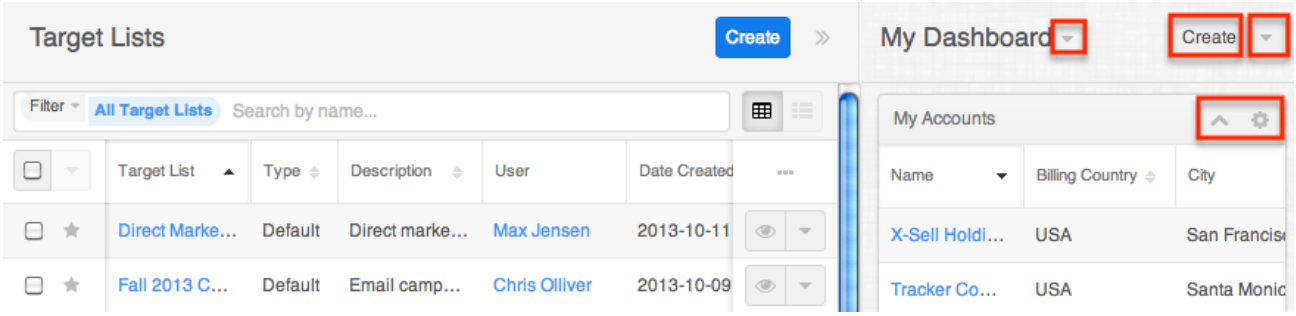



## Intelligence Pane

An intelligence pane displays to the right of the Target Lists list view and provides users with valuable record information via various dashlets. The Help dashboard normally displays by default along with the List View Help dashlet and Learning Resources dashlet. The List View Help dashlet provides users with a brief introduction to the module along with a link (e.g. Target Lists documentation) to the corresponding documentation in the Application guide. The Learning Resources dashlet includes links to Sugar University, Community Forums, and

Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may create other dashboards as well by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets (e.g. My Contacts, etc.) to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do not wish to view by clicking the Up arrow on the upper right of the dashlet. Please note that Sugar will remember the state of your intelligence pane the next time you return to the Target Lists module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.




## Target Lists Record View

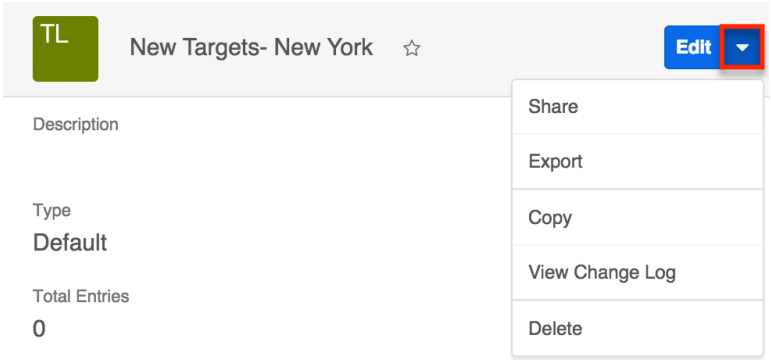
The Target Lists record view displays thorough target list information including all target list fields. Beneath the fields you can toggle between viewing a target list's ofrelated records (Targets, Contacts, Leads, Accounts, etc.). The record view can be reached by clicking a target list record's link from anywhere in the application including from the Target List's list view.

Please note that you will only be able to view a target list record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

### Actions Menu

The Actions menu on the top right of each target list's record view allows you to perform various actions on the current record. Simply click the triangle next to the Edit button and select the appropriate action (delete, copy, etc.) you would like to

perform in the record view.

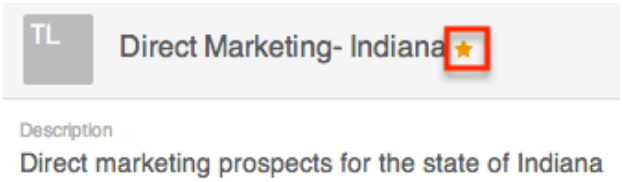



The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this target list |
| Share | Share a link to this target list via email |
| Export | Export the members of this target list to a CSV file |
| Copy | Duplicate this target list |
| Delete | Delete this target list |

## Favorite Designation

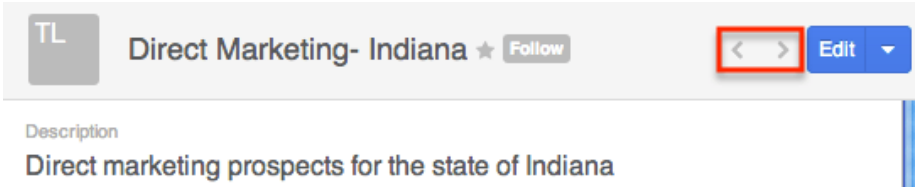
Users have the option to mark target list records as favorites via the record view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the Target Lists module tab. In the Target Lists record view, the star on the right of the target list's name is orange once favorited. For more information on how to mark records as favorites, please refer to the Favoriting Target Lists section of this documentation.




## Next or Previous Record

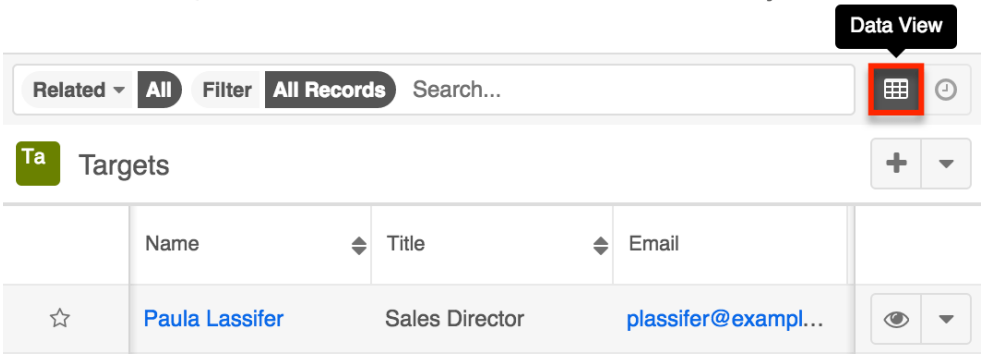
On the upper right of the Target Lists record view, there are two buttons that allow you to page through each target list in the Target List list view's current search results. Clicking the Left arrow button displays the previous target list

record of the current search results while clicking the Right arrow button displays the next target list record of the current search results.



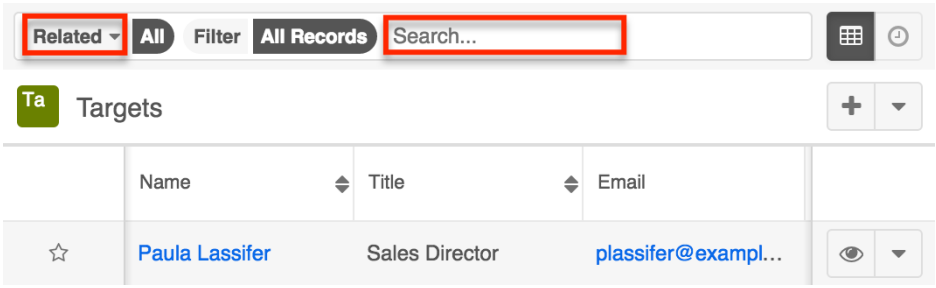

## Subpanels

Beneath a target list record's fields are subpanels containing related records from various modules such as Targets, Contacts, Leads, etc. The related records in the subpanels are considered targets for a mass marketing campaign and they are typically identified based on a set of predetermined criteria such as being a prospect or existing customer, age group, industry, etc. Selecting the Data View button will display the subpanels rather than the record's activity stream.

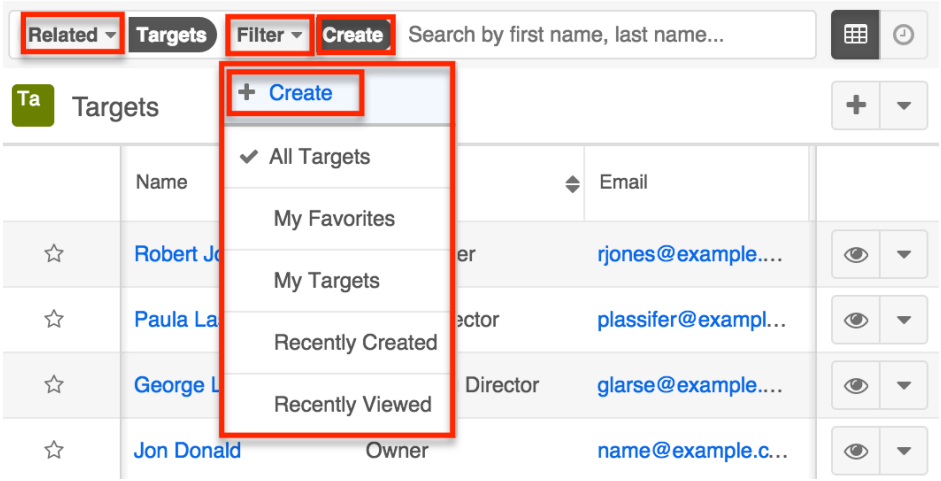



### Filter Options

While in Data View, all of the target list record's related records will be displayed beneath the target list record's fields. Users have the ability to search for records which appear in the subpanels as well as filter the view to only display a specific module (e.g. Leads, Contacts, etc.). To locate a record by name, enter the keyword into the Search bar, and the subpanel(s) with the matching record(s) will appear below. To filter, simply click the Related option to the far left of the Search bar and select the module whose subpanel you wish to view. Filter and search may be combined to only display matching records within a selected module. To see all subpanels to which you have access, simply select "All" in the Related options and remove any text from the search bar. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the page. Returning to the page will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.

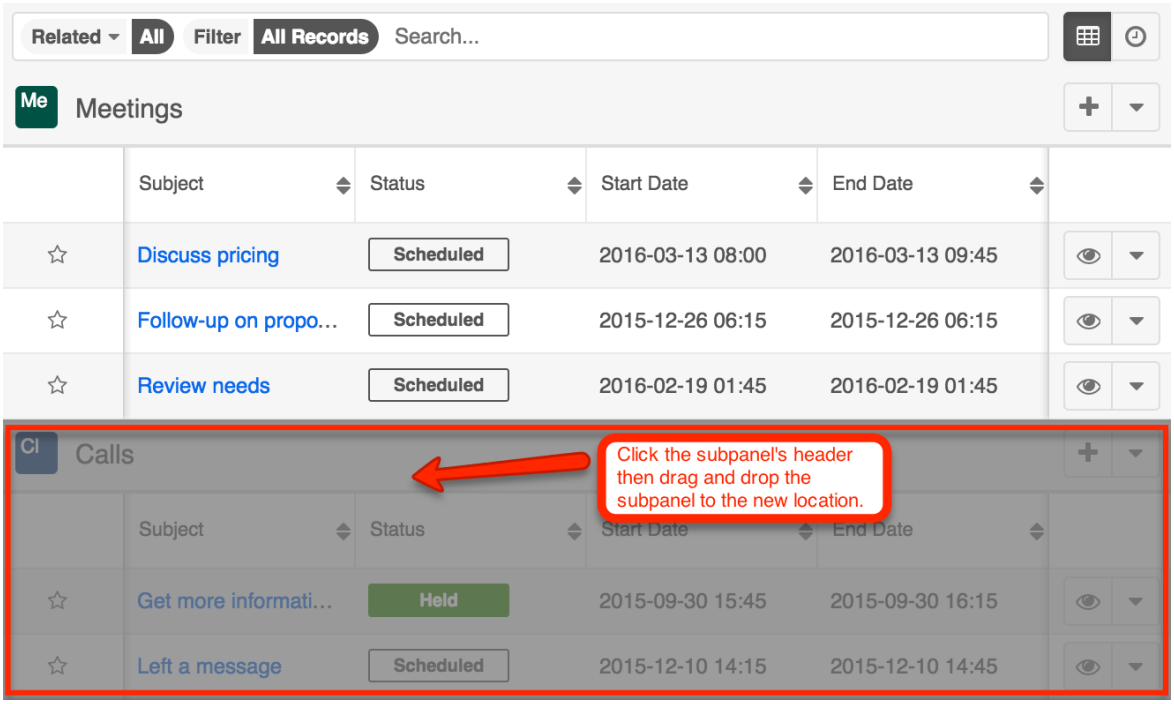



When a Sidecar module (e.g. Contacts, Leads, Targets, etc.) is selected from the Related options, you have the option to filter the related subpanels further using one of the available options (e.g. My Favorites, Recently Created, etc.). Please note that you can also create custom filters for related Sidecar modules. Once the related module (e.g. Targets) is selected, either click the Filter option and select "Create" or click "Create" to the right of the Filter option. For more information on creating a related records filter, please refer to the Creating a Related Records Filter section of the Search documentation.




## Reordering Subpanels

Users can easily move subpanels to a new location on the record view by dragging and dropping the subpanel's header. The new subpanel order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared.



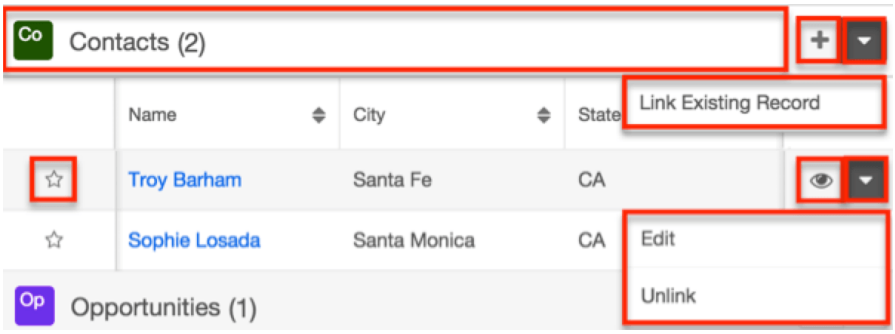

Related Record Subpanels

The subpanels that are displayed by default in the Target List's record view are Targets, Contacts, Leads, Users, and Accounts. Users can easily select and add records via these subpanels to populate their target list. For more information on the various ways you can populate a target list, please refer to the Populating Target Lists section of this documentation.

Related record subpanels allow the following operations to be performed:

- To view the details of a related record, click the record's name in the subpanel to open it in record view.
- To relate an existing record to the target list, choose "Link Existing Record" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the target list, click the Plus button to the left of the Actions menu, then complete the record view layout and click "Save".
- To preview the related record, click the Preview icon to the far right of the record's row in the subpanel.
- To inline edit the record directly from the subpanel, choose "Edit" from the Actions menu on the far right of the record's row and click "Save" to preserve the change.
    - Note: Regular users can link or unlink any active user record via the Users subpanel, but can only inline edit their own user record. Administrators can inline edit, link, and unlink any active user record via the Users subpanel.

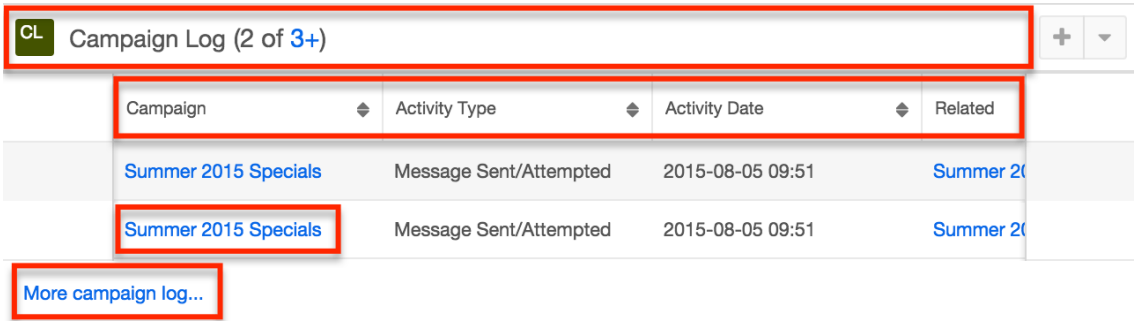
- To delete the target list's relationship to a record, choose "Unlink" from the Actions menu on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To mark the record as a favorite, click the star icon to the left of the desired record's row. For more information on how to mark records as favorites, please refer to the Favoriting Target Lists section of this documentation.
- To collapse or expand the subpanel, click anywhere on the subpanel's header.
- To change the column size in the subpanel, place your cursor on the column divider and when the Left and Right arrow appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.




Campaigns Subpanel

The Campaigns subpanel contains information regarding the specific campaign related to the target list. When a campaign is created in Sugar and a target list is associated, the campaign's name will appear within the Campaigns subpanel of the target list's record view. For more information on creating and sending campaigns, please refer to the Campaigns documentation. Users can also choose "Link Existing Record" from the subpanel's Actions menu to locate and select the campaign they wish to relate to the target list. In addition, you can click the Plus button to the left of the Actions menu to relate a new campaign record. Please note that you can delete the target list's relationship to the campaign by selecting "Unlink" from the Actions menu on the far right of the record's row in the subpanel. Keep in mind that this removes the relationship, but does not delete the record itself.

You can also mark a campaign as a favorite by clicking the star icon to the left of the desired record's row. For more information on how to mark records as favorites, please refer to the Favoriting Target Lists section of this documentation.




## Intelligence Pane

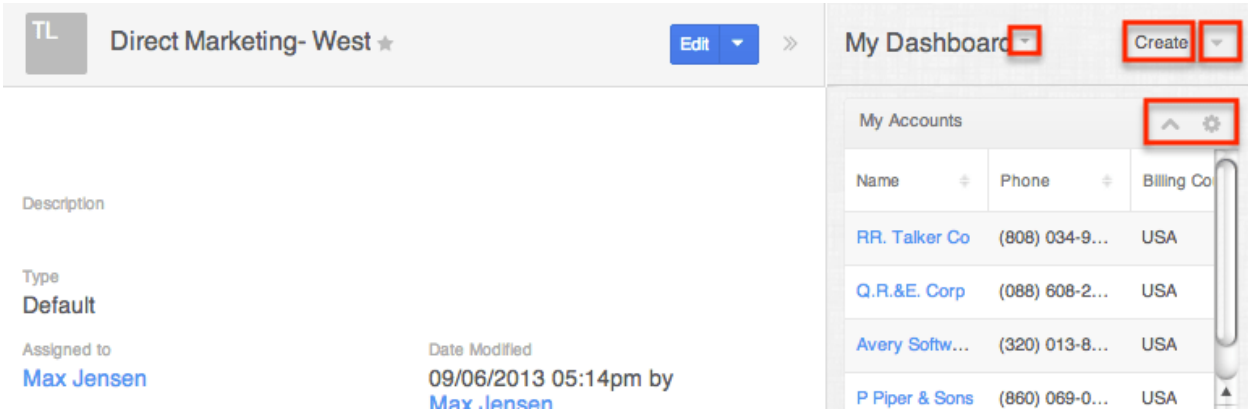
An intelligence pane displays to the right of the target list's record view and provides users with valuable information specific to the record. The Help Dashboard normally displays by default and contains the Record View Help dashlet and Learning Resources dashlet.

The Record View Help dashlet provides users with a brief introduction to the module along with some instructions to help users utilize and navigate around the record view. A link to the corresponding documentation (e.g. Target Lists documentation) in the Application guide is also provided within the Help dashlet.

The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard, which will display some stock dashlets (e.g. Planned Activities dashlet, History dashlet, etc.) by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard".

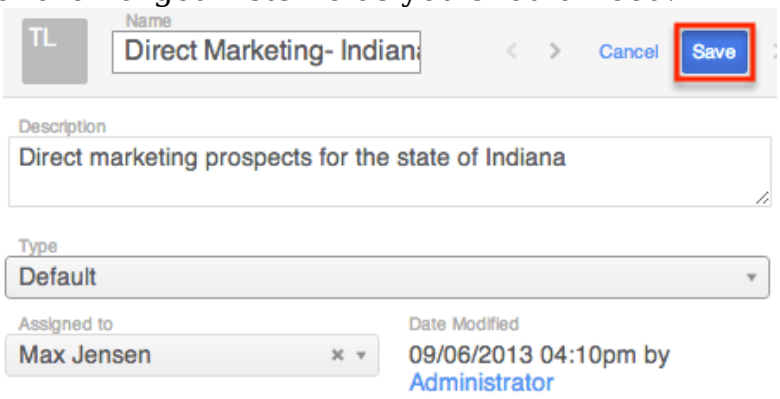
Users may choose to view any of their dashboards using the triangle to the right of the current dashboard's name and click the Create button to create new dashboards. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can also collapse dashlets you do not wish to view by clicking the Up arrow on the upper right of the dashlet. Please note that Sugar will remember the state of your intelligence pane the next time you return to the Target Lists module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.




# Editing Target Lists

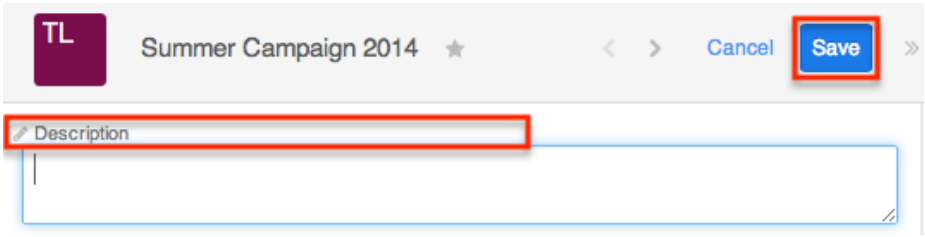
Target Lists may be edited at any time to update or add information to the record. You can make changes to existing target list records via the Target Lists record view. The record view is available within the Target Lists module and includes all of the Target Lists fields you should need.




Please note that your ability to edit target lists in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

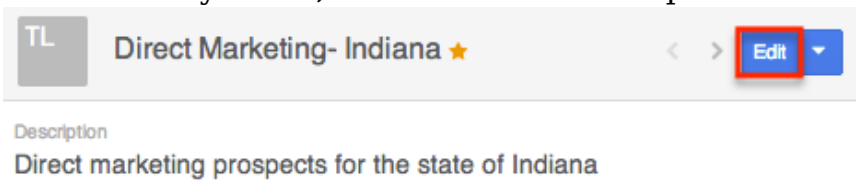
## Editing Inline Via Record View

Users can edit individual fields on the Target Lists record view without entering the full edit mode by clicking the field name. Fields which are available for inline editing will display a pencil icon when hovering on the field name or value. This will allow users to type or select a new value. Click "Save" to preserve the changes made to the field.



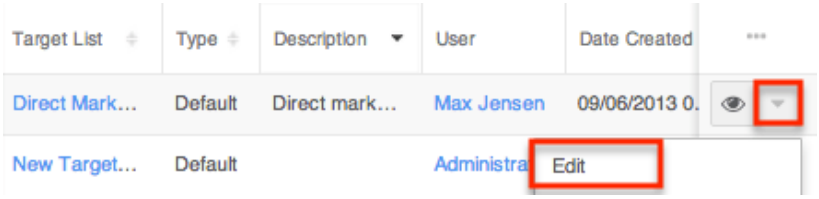

## Editing Via Record View

You can edit many target list fields at once via the record view by clicking the Edit button on the upper right of the page. Once the record view layout is open, update the necessary fields, then click "Save" to preserve the changes made.

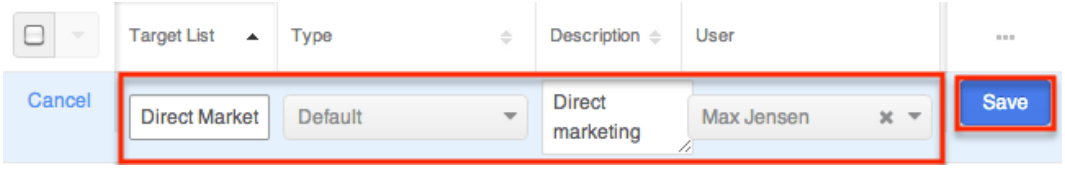



## Editing Inline Via List View

You can also edit individual fields on the Target Lists list view without entering the full edit mode. Click the Record Actions menu to the far right of the record's row and select "Edit".




The fields on the record's row will open up allowing users to type or select a new value. You can click the double arrow icon on the upper right of the page to expand the list view for editing. Click "Save" to preserve the changes made to the record.




Note: Text area fields are not inline editable from list views.

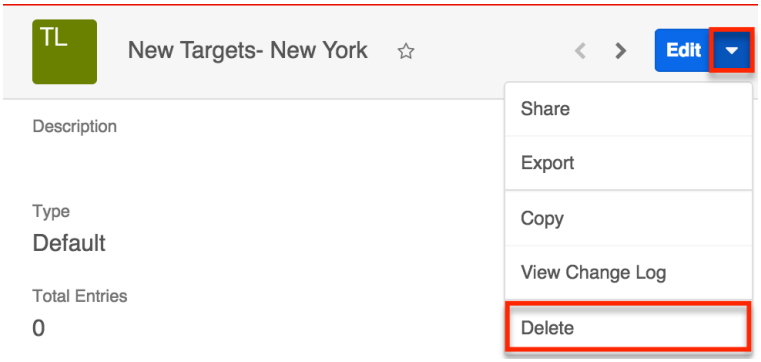
# Deleting Target Lists

If a target list record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Target Lists record view or list view. Deleting via the record view allows you to delete a single record while the list view allows for mass deleting multiple records at once as well as single record deletions. Deleting target list records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.
Please note that your ability to delete target lists in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

## Deleting Via Record View

Use the following steps to delete a target list record via the record view:

1. Navigate to a target list's record view.
2. Select "Delete" from the Actions menu.

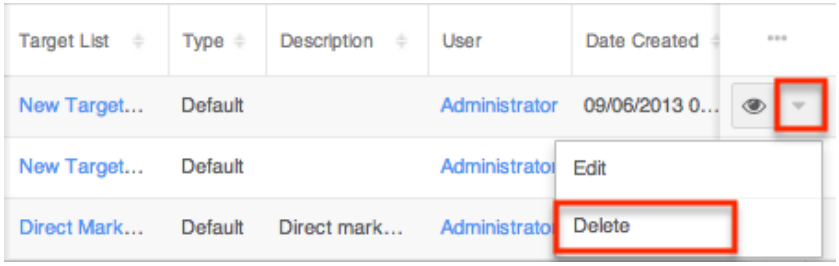



3. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

## Deleting Via List View

Use the following steps to delete a target list record via the list view:

1. Navigate to the Target Lists list view by clicking the Target Lists module tab.
2. Use the Module Search to find the Target List record you wish to delete.
3. Click the Record Actions Menu to the far right of the record's row and select "Delete".

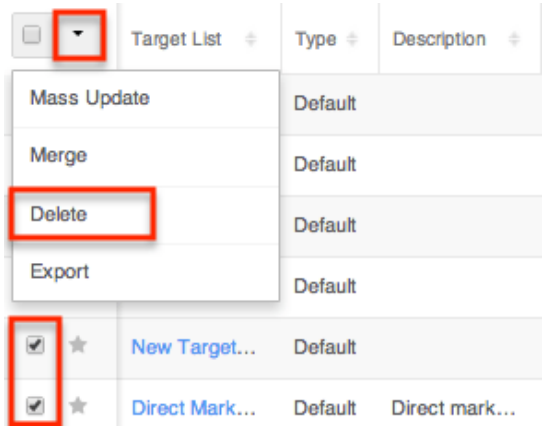



4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

### Mass Deleting Via List View

Use the following steps to delete one or more target list records via the list view:

1. Navigate to the Target Lists list view by clicking the Target Lists module tab.
2. Use the Module Search to find the Target List records you wish to delete.
3. Select the desired target list records then choose "Delete" from the Actions menu.



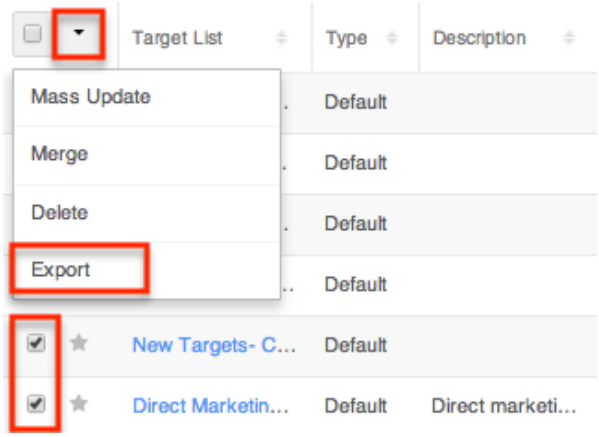

4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

You can also use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to delete more than 1000 records or delete a specific group of records on the list view, please use the in module search to perform the deletions in smaller batches.

## Exporting Target Lists

Sugar's Export option allows users to download all fields for the selected target lists to their computers in a .CSV (comma-separated values) file. This may be useful when needing to use target list data with other software such as Microsoft Excel. Target Lists may be exported from the Target Lists list view by selecting

"Export" from the Actions menu. For more information on exporting records in Sugar, please refer to the Export documentation.

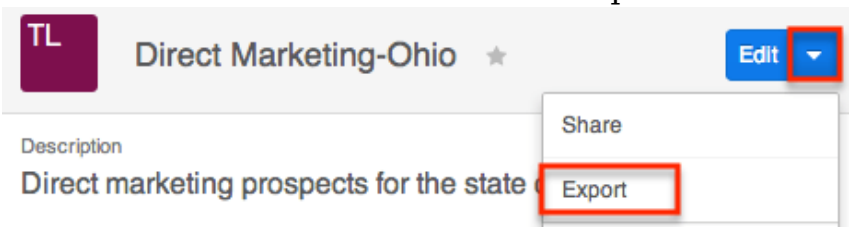



Please note that your ability to export target lists from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

## Exporting Target List Members

In addition to exporting target list records from the Target Lists list view, Sugar allows you to export the members of a target list from the Target Lists record view. This allows users to download all fields for the members of the selected target list to their computers in a .CSV format.
Use the following steps to export the members of a target list via the target lists record view:

1. Navigate to a target list's record view.
2. Click the Actions menu and select "Export".




Please note that your ability to export target list members from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

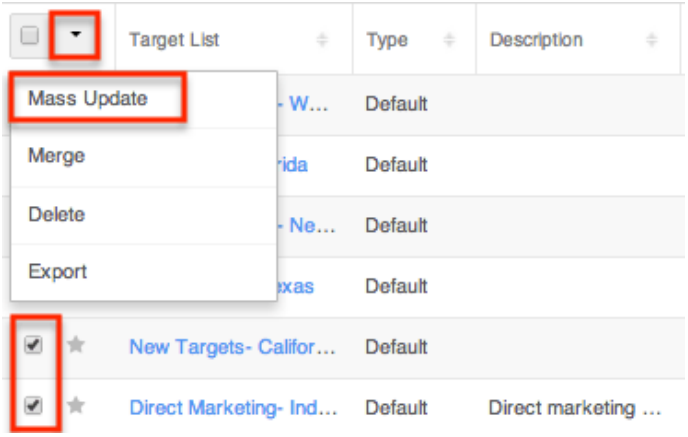
# Mass Updating Target Lists

Mass Updating allows users to make the same change to multiple records at once from the Target Lists list view. Users with administrator or developer level access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date,datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide.You can use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to update more than 1000 records or update a specific group of records on the list view, please use the filter option in module search to perform the updates in smaller batches.

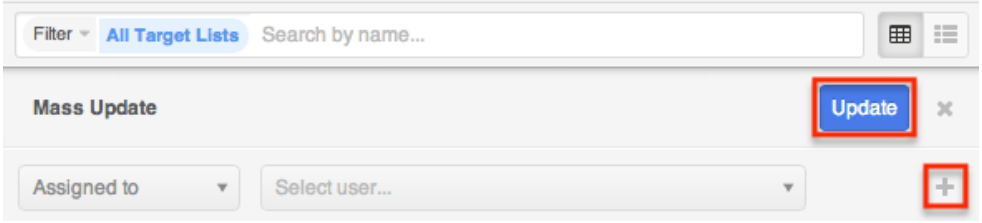
Please note that your ability to mass update target lists may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

Use the following steps to mass update target list records from the list view:

1. Navigate to the Target Lists list view by clicking the Target Lists module tab.
2. Use the list view's Module Search to identify target lists you wish to modify.
3. Select the desired target lists then choose "Mass Update" from the Actions menu.




4. The Mass Update panel will appear below the search bar. Set values for the field(s) you wish to alter.
    - To add additional fields for mass update, click the Plus icon to the right of the dropdown list.
    - Note: If the Teams field is selected, mark the Append Team(s) checkbox to add the specified team(s) to any existing team assignments. Not marking the checkbox will replace the existing team assignment with the new one.




5. Click "Update" to save the changes to all of the currently selected target list records.

## Merging Target Lists

When duplicate records are identified in Sugar, you have the option to merge two or more target lists into a single record. Once the merge is complete, the duplicate target list record(s) will be deleted, and the primary record will remain. Please note that all relationships belonging to the duplicate target list will be merged to the primary record meaning that any contacts, accounts, etc. related to the duplicate target list record(s) will automatically be related to the resulting, merged target list record.

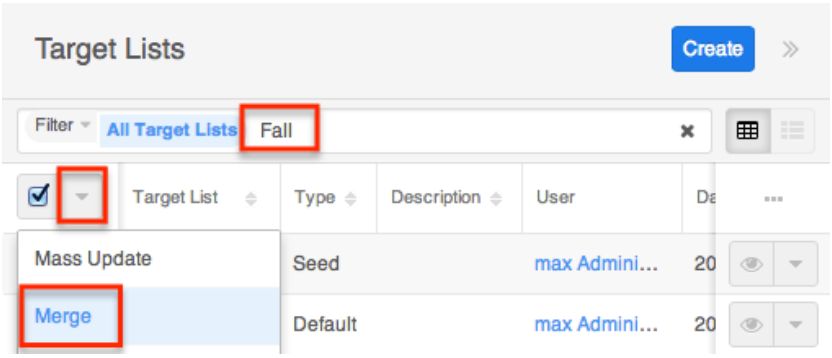
Note: Date Created, Date Modified, and Password field types are not supported when merging duplicate records in Sugar.

### Merging Via List View

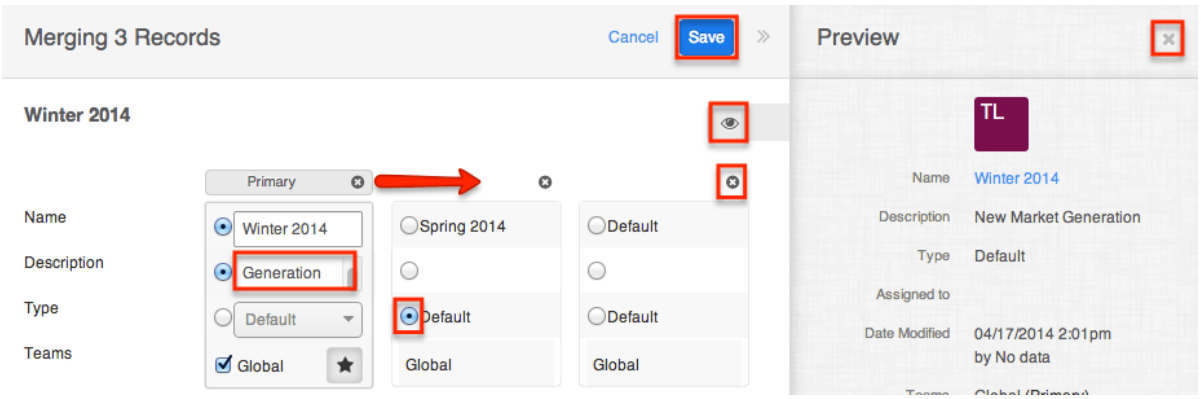
Module Search may be used to identify duplicate target lists by, for example, searching for target lists with similar names. Once your search has identified duplicate target lists, you can merge them directly from the Target Lists list view.

Use the following steps to merge target lists via the list view:

1. Use the list view's Module Search to identify duplicate target lists.
2. Possible duplicates will be displayed in the list view. Select the duplicate record(s) that you wish to merge.
    - Please note that up to five records may be merged at once in Sugar. An error message ("Invalid number of records passed. The valid range is from 2 to 5 records.") will appear if more than five records are selected when attempting to perform a merge.




3. Select "Merge" from the Actions menu to display the Merging Records page. The primary record's field values are displayed on the left while other record's values are in columns to the right. For convenience, fields with differing values will appear on the top of the list. Saving the merge will preserve only the field values marked with the radio button into a single record.




If 3 or more records are selected to be merged, an X icon will appear at the top right of each record. Clicking the "X" will remove the record from the merge process but will not delete the record.

4. To change which record is considered the primary, drag and drop the Primary label on the top of a different column.
5. Review the field values in each column and click the radio button to the left of the value that should appear on the final record. You can also manually type or select a new value for any field as necessary.
    - Note: Fields you do not have Edit access for cannot be edited on the merging records page.
6. Preview what the final, merged record will contain as you work by clicking the eye icon to display the preview in the Intelligence Pane.
7. Click "Save" once all fields you wish to appear on the single, merged record have their radio buttons selected.
8. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Confirm" to proceed.

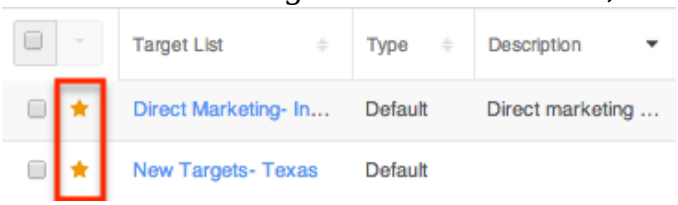
# Favoriting Target Lists

Each Sugar user has the option to designate their own favorite target lists which are important or will be viewed often so that they can easily be accessed via search or from the Target Lists module tab. Once records are marked as favorites, select "My Favorites" from the Filter option next to the Search bar to retrieve your favorites or select from your most recent favorites directly from the Target Lists Module Tab .

## Favoriting Via List View

Use the following steps to mark records as favorites via the Target Lists list view:

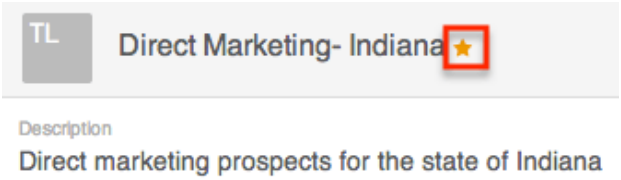
1. Navigate to the Target Lists list view by clicking the Target Lists module tab.
2. Use the Module Search to find the Target List records you wish to mark as favorites.
3. Mark the star icon on the left of each desired target lists' row.
4. To remove the target list as a favorite, click the star again to revert it to gray.




## Favoriting Via Record View

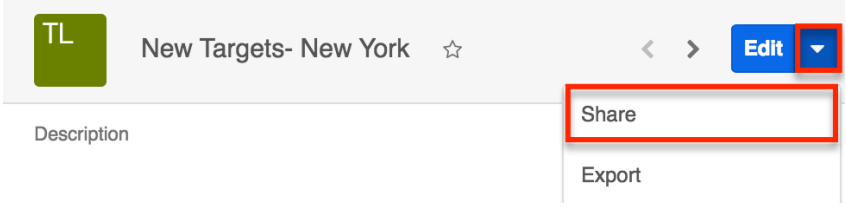
Use the following steps to mark records as favorites via the Target Lists record view:

1. Navigate to a target list's record view.
2. Click the star icon to the right of the target list's name in the upper left of the record view to designate it as a favorite.
3. To remove the target list as a favorite, click the star again to revert it to gray.



## Sharing Target Lists

Individual Target List records can be shared with other users in your organization by sending an email with the record's link directly from the record view. In the target list's record view, select "Share" from the Actions menu which will open a Compose Email window including the URL of the target list record. Enter the recipient(s) email address in the To field then click "Send".




Users can simply click the link in the email to access the target list record in Sugar. Please note that the user must be logged into Sugar in order to access the record. Users will only be able to view the shared record as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

Last Modified: 12/21/2015 04:45pm

# Campaigns

## Overview

Sugar's Campaigns module can be used to create and manage email and non-email marketing and advertisement campaigns for your organization. Email-based campaigns can be used to send mass emails or a series of newsletter emails to individuals with whom you have an active or growing relationship. The results of each campaign are recorded to measure the success of your campaigns.

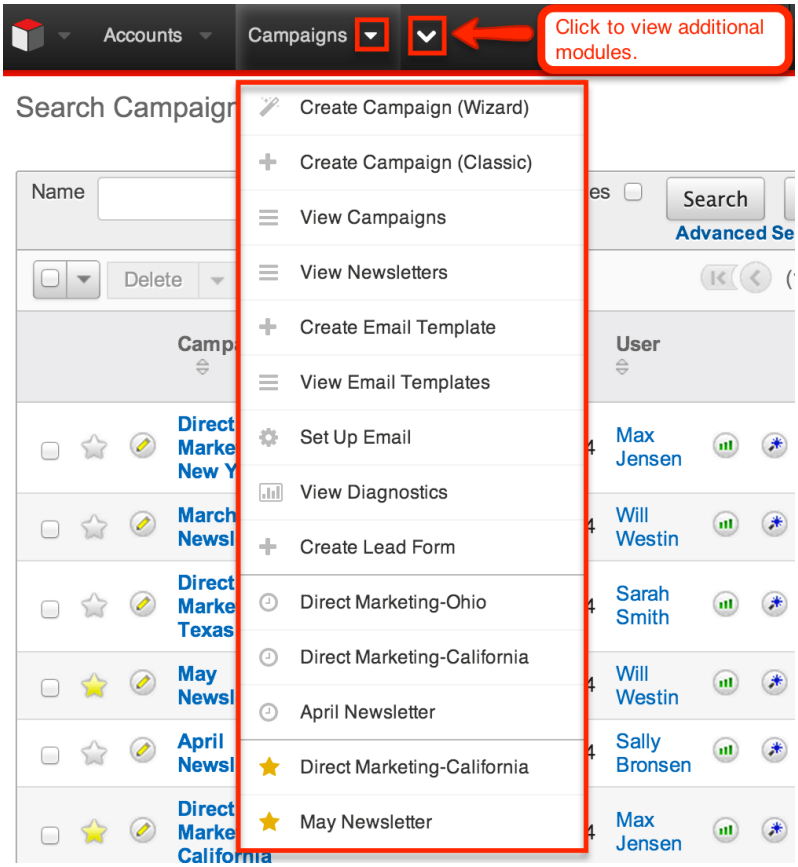
## Campaign Fields

The Campaigns module contains a number of stock fields, which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

| Field | Description |
| --- | --- |
| Actual Cost | The total cost of the campaign |
| Assigned To | The Sugar user assigned to the campaign record |
| Budget | The budgeted amount for the campaign's cost |
| Currency | The currency of the campaign costs |
| Description | A description or other information about the campaign |
| Date Created | The date the campaign record was created |
| Date Modified | The date the campaign record was last modified |
| End Date | The date the campaign is expected to end |
| Expected Cost | The expected cost of the campaign |
| Expected Revenue | The expected revenue stemming from the campaign |
| Frequency | For newsletter-type campaigns, the frequency the campaign is expected to be sent |
| Impressions | The expected number of recipient click-throughs |
| Name | The name of the campaign record |
| Objective | The objective or purpose of the campaign |
| Start Date | The date the campaign is expected to start |
| Status | The current status of the campaign<br><br>Note: This field is manually set, not automatic. |
| Teams | The Sugar team(s) assigned to the campaign |
| Type | The campaign's format or type (e.g. email, web) |

# Campaigns Module Tab

The Campaigns module tab is typically found by clicking the arrow to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Campaigns" to access the list view. Once the Campaigns tab displays on the navigation bar, you can click the triangle within the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the campaigns, target lists, and targets you last viewed in the module. The Favorites menu displays the list of campaigns you most recently marked as favorites in the module.




The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Create Campaign (Wizard) | Opens the campaign wizard to create a new campaign |
| Create Campaign (Classic) | Opens the edit view layout to create a new campaign |
| View Campaigns | Opens the list view layout to search and display campaigns |
| View Newsletters | Opens the list view layout to search and |

| | |
|---|---|
| | display newsletter-type campaigns |
| Create Email Template | Opens the Email Templates edit view layout to create a new email template |
| View Email Template | Opens the Email Templates list view layout to search and display email templates |
| Set Up Email | For users with administrator access, opens the email setup for campaigns wizard |
| View Diagnostics | Displays your system's configuration status for sending email-based campaigns |
| Create Lead Form | Opens the Lead Form wizard to generate a web-to-lead form |

If you do not see the Campaigns tab in Sugar, please check the following:

- The Campaigns module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Campaigns module in the Hide Modules list, simply move it to the Display Modules list and save. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Campaigns module for your entire Sugar instance. Reach out to your Sugar administrator to have the Campaigns module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

## Prerequisites

There are several key components involved when executing an email or newsletter campaign in Sugar. Before sending out an email-based campaign, an administrator must make sure the following items are set up properly:

- Outbound Emails : Configure Sugar to send outbound emails via Admin > Email Settings. For more information on configuring outbound email, please refer to Set Up Email below or to the Email documentation in the Administration Guide.
- Campaign Batch Size : Specify the number of emails sent per batch via Admin > Campaign Email Settings. Due to some email providers throttling the

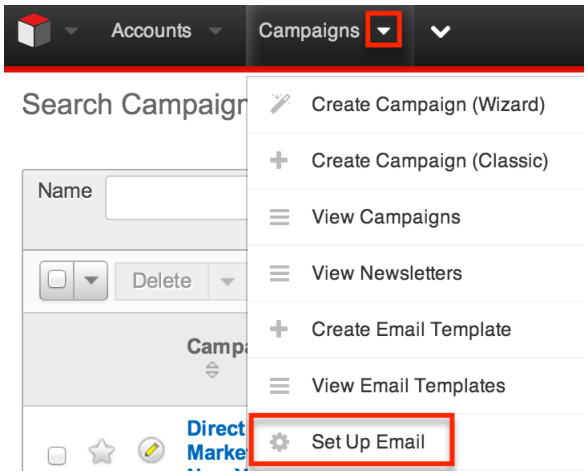
number of emails allowed to be sent at one time, we recommend setting this to 200 and adjusting as necessary. For more information on configuring the campaign batch size, please refer to Set Up Email below or to the Email documentation in the Administration Guide.

- Bounce Handling Account : Create the bounce-handling inbox for bounced campaign emails via Admin > Inbound Email. For more information on configuring the bounce handling account, please refer to the Email documentation in the Administration Guide.
- Campaigns Scheduler : Configure the scheduler job that automatically sends campaign emails via Admin > Schedulers > Run Nightly Mass Email Campaigns Scheduler. The frequency of this scheduler should be determined in conjunction with the campaign batch size to ensure you do not exceed sending limitations imposed by your email provider. For more information on configuring schedulers, please refer to the Schedulers documentation in the Administration Guide.
- Bounced Emails Scheduler : Configure the scheduler job to process the bounced campaign emails via Admin > Schedulers > Run Nightly Process Bounced Campaign Emails Scheduler. For more information on configuring schedulers, please refer to the Schedulers documentation in the Administration Guide.
  Note: The Run Nightly Mass Email Campaigns and Run Nightly Processed Bounced Campaign Emails schedulers are configured by default to run every night on the hour from 2:00 AM to 6:00 AM for the time zone of the admin user (User Id = 1). For quicker processing of campaign information we recommend changing both schedulers to run every 10 minutes throughout the day. Please note that if your email provider throttles the number of emails allowed to be sent in a given time period, you may need to reduce the frequency of sending.

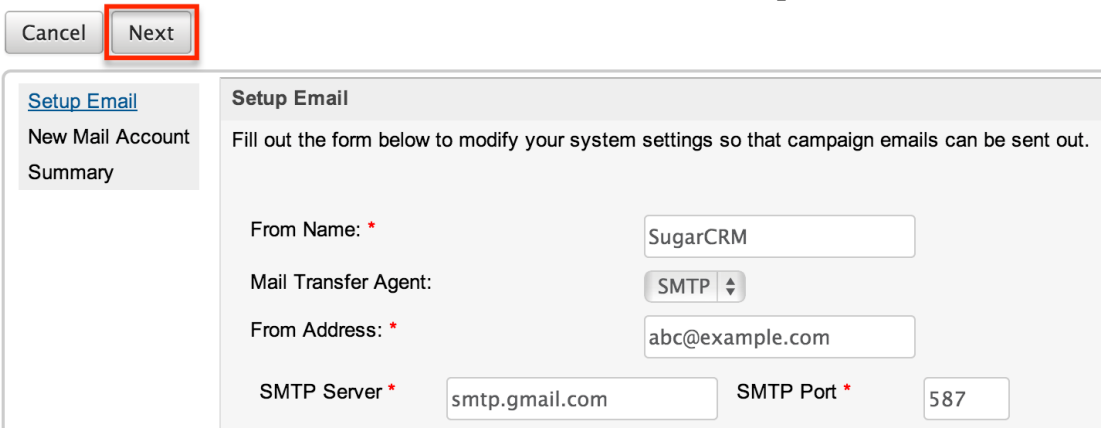
## Set Up Email

In addition to navigating directly to the email settings on the Administration page, you can also configure Sugar's email settings for campaigns via the Set Up Email option in the Campaigns module tab. This launches a wizard that walks through entering all of the relevant information for email set up. Please note that the Set Up Email option is only available to administrators and only needs to be configured once for your Sugar instance.
Use the following steps to configure email settings via the Campaigns module:

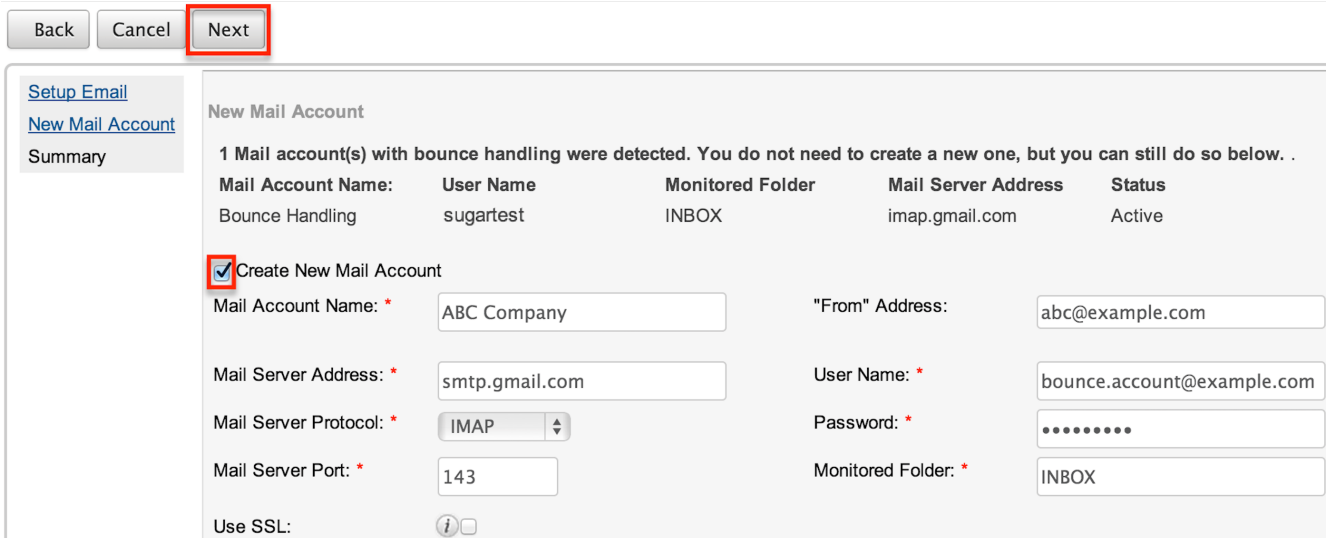
1. Click the triangle in the Campaigns module tab to open the Actions menu and select "Set Up Email".



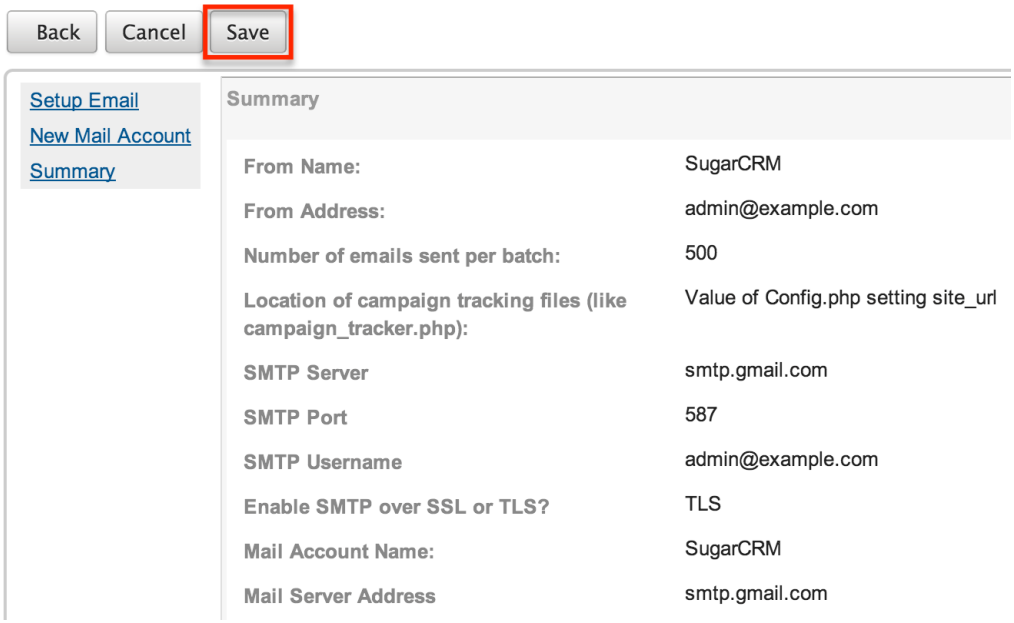

2. Enter the appropriate values specific to your email server in the fields on the Setup Email page. Please note that any values entered on this page will affect the system-wide email settings in Admin > Email Settings. Click "Next".
Note: All required fields (e.g. From Name, From Address, SMTP Server, etc.) are marked with a red asterisk and must be completed.




3. Enter the appropriate information to set up your bounce-handling email account on the New Mail Account page. Click "Next".
Note: A message will display if you already have an existing bounce-handling account, but you can mark the Create New Mail Account checkbox if you wish to create another one.



4. The Summary page will display a summary of the information you entered on the previous steps. Click "Save" to preserve your changes.

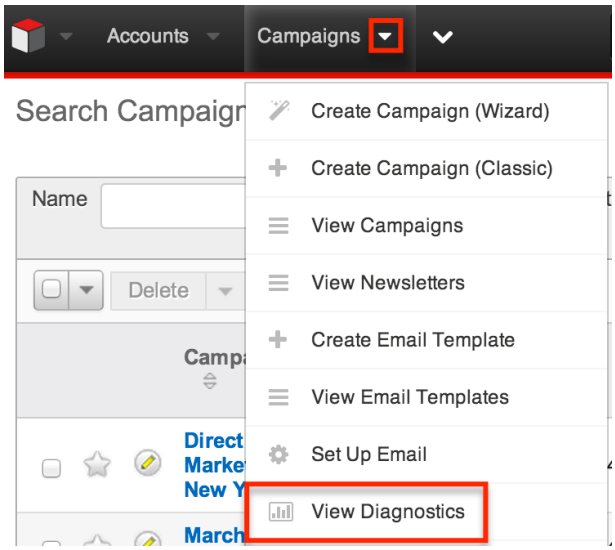



## Campaign Diagnostic Tool

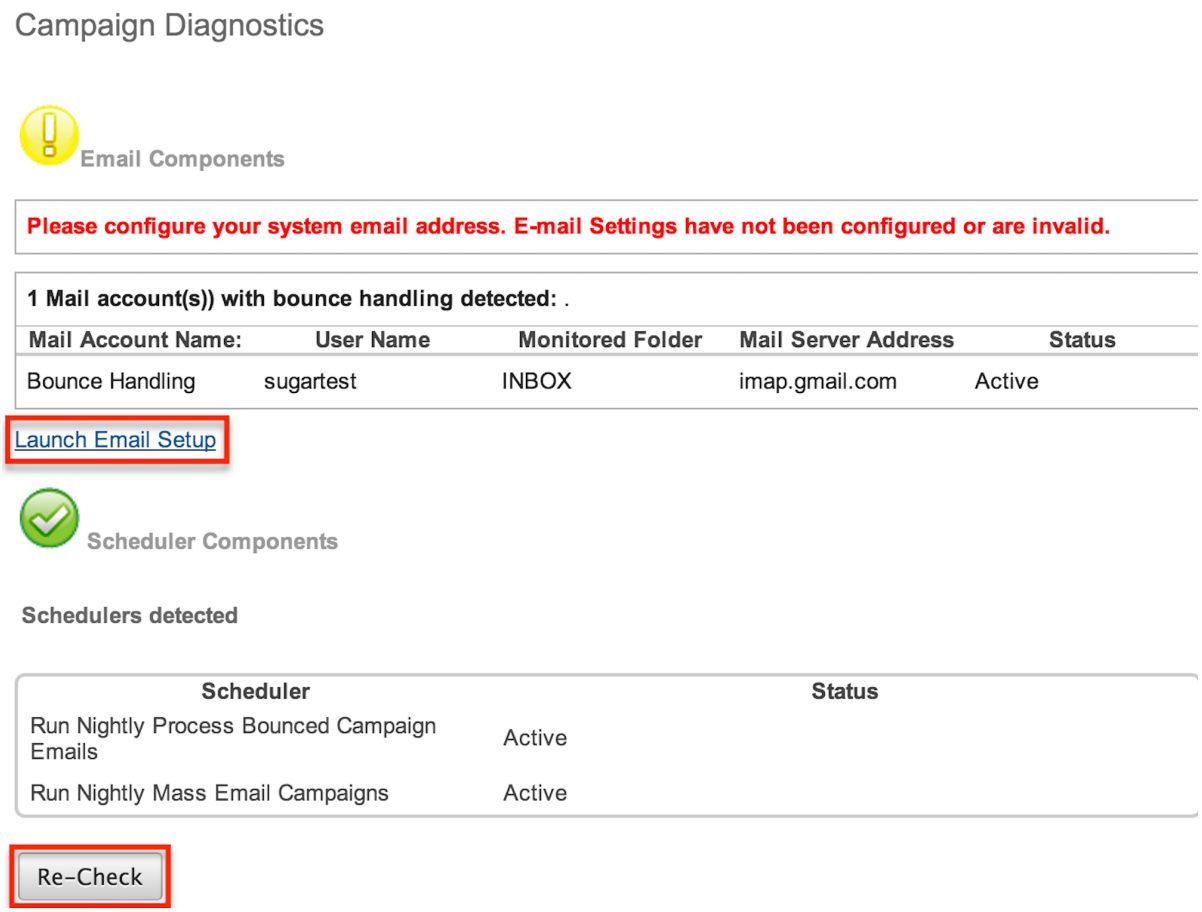
The campaign diagnostic tool enables you to check if all pending administrative tasks have been completed before you attempt to launch the campaign. It is recommended that the Campaign Diagnostic tool be run prior to sending out campaigns to ensure any issues get resolved before the campaign emails need to be sent.

Use the following steps to run the campaign diagnostic tool:

1. Click the Actions menu in the Campaigns module tab and select "View Diagnostics".




2. Sugar will check your instance's email and scheduler configuration and display warnings if any additional configuration is necessary. Administrator users will also see links (e.g. Launch Email Setup) to appropriate sections of the Administration page to correct the issues.
   Note: If you are not an administrator user, please reach out to your system administrator to have the issues looked into and resolved accordingly. For more information on the required elements for campaigns, please refer to the




3. Once all necessary configurations have been completed, click the Re-Check button to re-run the campaign diagnostic tool.

## Campaign Types

Sugar supports many different types of campaigns. The main types and their differences are as follows:

- Newsletter : A series of mass emails sent to a consistent or growing target list periodically or on a regular basis. Each newsletter is intended to be managed on a subscription basis and is normally targeted towards individuals with whom you have an existing relationship. The Frequency field is only available for campaigns with the type set to "Newsletter". Recipients opting out of newsletter-type campaigns are added to that campaign's unsubscription list but will still be able to receive other campaigns' emails.

- Email Campaign : A one-time or series of mass emails sent to a target list. Email campaigns are typically targeted towards a wide audience with the intention of lead generation. Recipients opting out of email-type campaigns

have their email address marked as "opt-out" and are prevented from receiving any future campaign emails.

- Non-email based Campaign : A non-email mass marketing effort delivered via mail, web, radio, television, print, or telesales. These campaigns are not executed through Sugar, but you can create a campaign record and manually update send dates and results for record keeping and to assess return on investment.

Note: Non-email based campaigns will not display Tracker URLs and Email Marketing subpanels in the detail view.

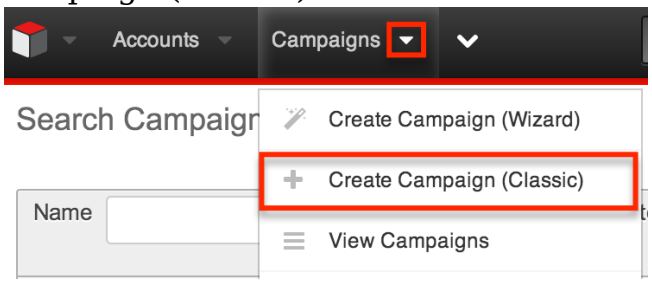
## Creating Campaigns

There are two primary methods for creating a campaign in Sugar: the Create Campaign (Classic) option and the Create Campaign (Wizard) option. When using the classic option, you will create the campaign record then add the target list and create tracker URLs as well as an email marketing record via the related subpanels below the campaign's detail. The classic option is recommended for simplicity and empowering users to make modifications to the campaign later. The campaign wizard option will walk you through getting the campaign created step-by-step. Each step of the campaign set-up process will guide users on the items (Tracker URLs, Target List, Marketing, etc.) that need to be completed.

### Creating Via Classic Option

Creating a campaign using the classic method opens the Campaigns edit view where you may enter the basic campaign information. Use the following steps to create a campaign via the classic option:

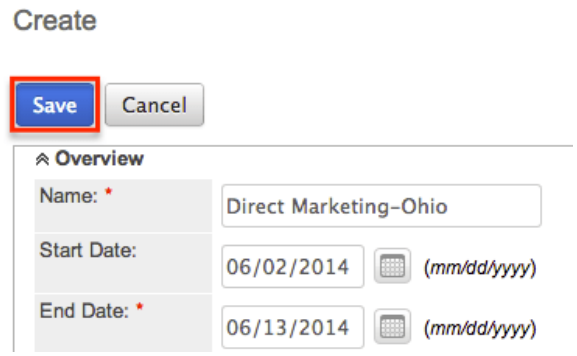
1. Click the Actions menu in the Campaigns module tab and select "Create Campaign (Classic)".




2. Enter appropriate values for the fields in the edit view layout which will help

identify the campaign. All required fields are marked with a red asterisk and must be completed prior to saving.
Note: The status, start date, and end date entered on this screen are for your records only and will not control when the actual email campaign will be executed.

3. Once the necessary information is entered, click "Save".

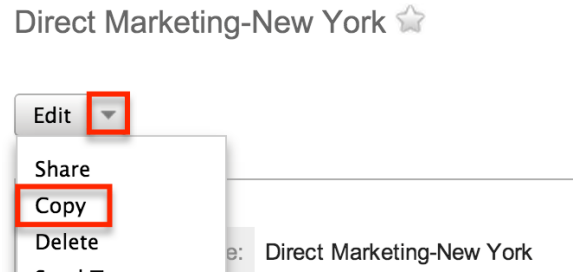



Once the campaign record is created, scroll to the related subpanels below the campaign's detail to add the target list and create the tracker URLs as well as an email marketing record.

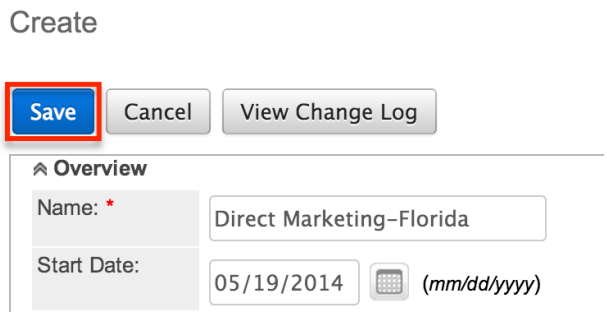
## Creating Via Duplication

You can also create a new campaign by duplicating an existing campaign record. The Copy option is useful if the campaign you are creating has similar information to an existing campaign. When duplicating a campaign, the campaign data, and the related target lists will copy over, but the original campaign's tracker URLs and Email Marketing records will not be related to the new campaign.
Use the following steps to create a campaign by duplicating an existing campaign record:

1. Navigate to a campaign record's detail view.
2. Click the Actions menu and select "Copy".




3. The displayed edit view is pre-populated with the original campaign's values. Update the necessary fields, then click "Save".




Once the campaign record has been created, scroll to the related subpanels below the campaign's detail to add the target list and create the tracker URLs as well as an email marketing record.

## Creating Target Lists

A target list consists of a collection of individuals or organizations you want to include or exclude in a mass marketing campaign. Target lists can contain any number and combination of contacts, leads, targets, users, and accounts. You have the option to associate existing target lists with your new campaign or to create new target lists during the campaign creation process.

The target list type determines some specific functionality within the campaign. The available target list types are "Default", "Seed", "Suppression List", and "Test". Default and Seed-type target lists will receive emails when campaigns are sent. Test-type target lists will receive emails when campaigns are tested.

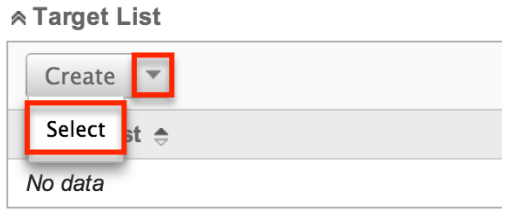
Sugar will also create some target lists for you by default. For example, when selecting a campaign type of "Newsletter", Sugar automatically generates three target lists for the campaign: default-type "Subscription List", suppression by ID-type "Unsubscription List", and test-type "Test List". Please note that these three target list types are required for the Newsletter campaign. You may add additional target list types to the campaign as necessary. If you wish to remove the system generated target list types (e.g. suppression by ID-type "Unsubscription List"), please keep in mind that you must replace it with the same target list type (e.g. Suppression List - By Id).

For more information about target lists, please refer to the Target Lists documentation.

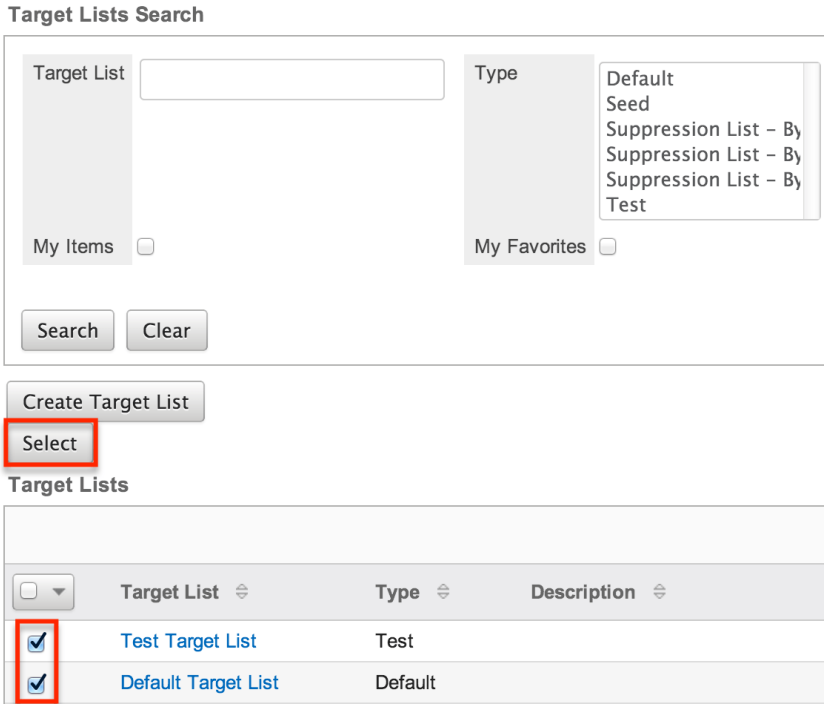
Use the following steps to add an existing target list to your campaign via the Target List subpanel on the Campaigns detail view:

1. Navigate to the Target List subpanel.

2. Choose "Select" from the Actions menu.
   Note: Click the Create button if you wish to create a new target list for the campaign.




3. Locate and select the name of the desired target list in the pop-up window. To add several target lists at once, mark the specific record's corresponding checkbox then click "Select".




## Creating Tracker URLs

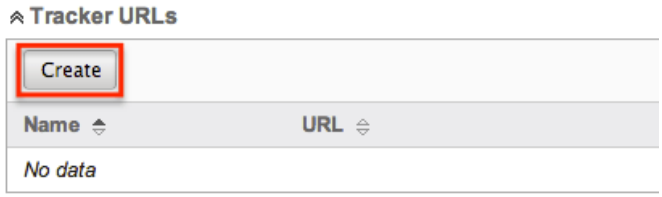
Tracker URLs are links to websites that are hosted either internally or externally. These links can be embedded into your email template to help you understand how your recipients are using the campaign email. When the link is clicked, it either opens a website, web-to-lead form, or other URL in your recipient's browser. If you choose to create your links as tracker links, then Sugar will log your recipient's clicks by assigning each tracker link a unique key and routing the link through Sugar before loading the final URL in their browser. The click-through results can be reported on and are visible in the Campaign Status section of the Campaigns module. For more information on the Campaign Status page, please refer to the Campaign Status section of this documentation. A specific type of tracker URL is the opt-out link which allows the recipient to opt out of receiving your campaign emails instead of directing them to another web location.

## Creating Redirect URLs

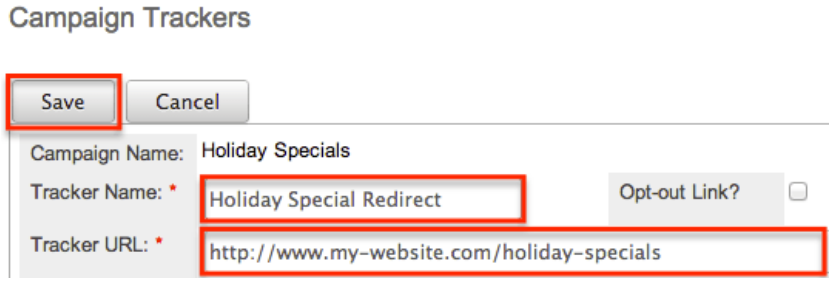
Redirect tracker URLs can appear as text or images in your campaign email and when clicked, will navigate your recipient's browser to the URL of your choice: a page within your organization's website, a targeted advertisement, or even a web-to-lead form where they can provide details that will be saved as a Sugar lead record. For more information on web-to-lead forms, please refer to the Web To Lead Forms documentation. The power of redirect URLs is that on each click they pass through your Sugar instance before arriving at their final destination. This allows the clicks to be tracked by your campaign to provide visibility into how your recipients are responding to the campaign.

Use the following steps to create a redirect URL via your campaign's detail view:

1. Navigate to the Tracker URLs subpanel.
2. Click the Create button to create a new tracker URL.




3. Enter appropriate values in the fields on the page. All required fields are marked with a red asterisk and must be completed.
   Tracker Name : Enter an internal name for the tracker URL.
   Opt-out Link : Leave this box unchecked.
   Tracker URL : Enter the destination URL where recipients will be directed to after clicking the link in the email.
4. Click "Save" to create the tracker URL record.



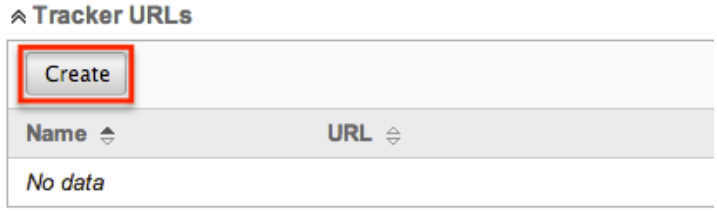

You can now insert this tracker URL into the email template of your choice. For more information on adding redirect URL links to your template, please refer to the Creating Email Templates section of this documentation.

## Creating Opt-out Links

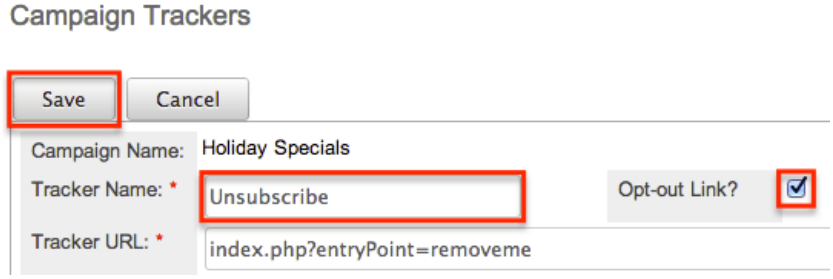
You can create an opt-out tracker URL to embed an Unsubscribe link in the campaign email which will allow the targets to opt out of your campaign mailing list. If an opt-out link is not included in the email template, Sugar will add a default opt-out link to the bottom of your campaign email. When targets click on the Opt-out link, Sugar logs the action for your records and the target receives a message stating they have elected to opt out of receiving future emails.
Note:The message returned to targets can be modified by changing the LBL_ELECTED_TO_OPTOUT label via Admin > Studio. For more information on how to modify labels, please refer to the Studio documentation in the Administration guide.

For a newsletter-type campaign, they will also be added to the suppression-type list which prevents them from receiving emails for that particular campaign in the future. In the case of an email-type campaign, their email address is marked as "Opted Out" on the target's record (e.g. Contact) to prevent them from receiving emails for any campaign. You must manually add your opt-out link by inserting the tracker URL into the email template via the Email Marketing record.
Note: Opt-out links for newsletters behave differently than other campaign types. When a target clicks an opt-out for a newsletter type campaign they are removed only from the specific campaign that sent the email. They are still able to receive email from other campaigns.
Use the following steps to create an opt-out link via your campaign's detail view:

1. Navigate to the Tracker URLs subpanel.
2. Click the Create button to create a new tracker URL.




3. Enter appropriate values in the fields on the page. All required fields are marked with a red asterisk and must be completed.
   Tracker Name : Enter an internal name for the tracker URL.
   Opt-out Link : Mark the checkbox so that this link will be used to allow recipients to opt out.
   Tracker URL : This is defaulted and disabled for opt-out links.




4. Click "Save" to create the opt-out tracker URL record.

You can now insert this tracker URL into the email template of your choice. For more information on adding an opt-out link to your template, please refer to the Creating Email Templates section of this documentation.

## Creating Email Marketing Records

When you create an email campaign, you must also create an Email Marketing record that specifies the body of the message in the form of an email template, which bounce handling account will catch automated replies from invalid email addresses, and which target lists will receive this particular mass email of your campaign.
When you are sending more than once from a single campaign, both newsletter-type and email-type campaigns will need a new Email Marketing for each subsequent send. For example, a monthly newsletter campaign will have 12 Email Marketing records created in a year, each one with a different email template with the same target lists. Or, if you wish to send an introductory email to all of your newest prospects every 3 months, this email-type campaign will have 4 Email Marketing records created in a year, each one using the same email template but different target lists. Sugar will not allow the same Email Marketing record to be sent to a recipient more than once.

Use the following steps to create an Email Marketing record via your campaign's detail view:

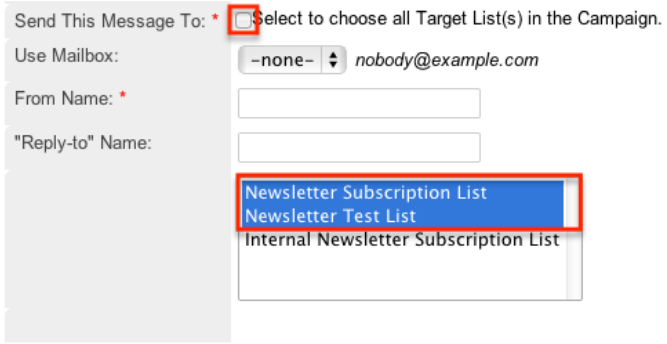
1. Click the Create button to create a new email marketing record.



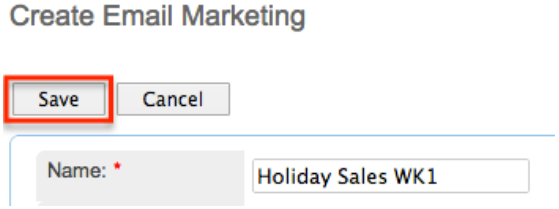

2. Complete the fields as follows. All required fields are marked with a red asterisk and must be completed.

- Name : Enter an internal name for the email marketing record.
- Status : Select "Active" from the dropdown. Only active Email Marketing records may be sent.
- Start Date & Time : Enter a date and time when the emails need to begin sending. This start date and time must have passed before the campaign may be queued for delivery.
- Email Template : Select or create an email template. For more information on creating an email template, please refer to the Creating Email Templates section of this documentation.

- Send This Message To : Check this box to send this email to all target lists that are associated with this campaign or select individual target lists via the multiselect box below.



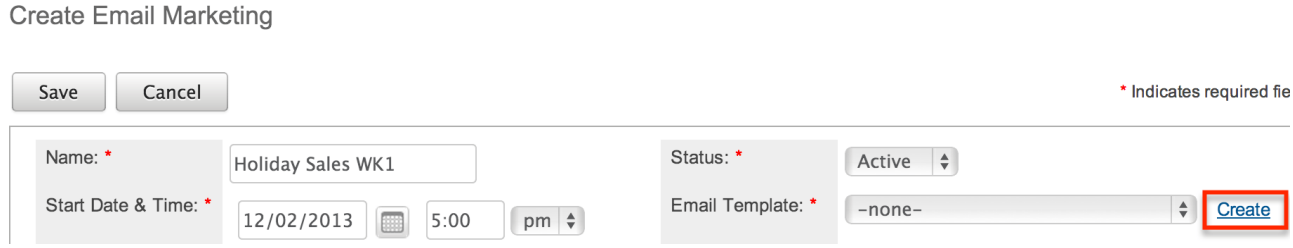

- Use Mailbox : Select the bounce handling account that will catch automated replies from invalid email addresses.
- From Name : This will automatically populate based on the selected bounce handling account. You can enter a different name that will appear as the email's From name.
- From Email Address : This will automatically populate based on the selected bounce handling account. You can override the field to enter a different email address that the campaign will be sent from. Please note that your system outbound email account may need to grant specific 'Send As' permissions if you wish to use a From email address that differs from the address set up in Admin > Email Settings. If these permissions are not granted, emails may fail to send or the authenticated email account will be imposed in place of the address depending on your mail server settings. Also, if the From address entered is not configured as a bounce handling email address in Sugar, you will not see the results of the bounced emails in your campaign's Status page .
- "Reply-to" Name : This field will automatically populate if a Reply-to name is provided on the bounce handling account. You can override the Reply-to name to a different one so that any replies on the email campaign can be addressed to this name on the email.
- "Reply-to" Address : This field will automatically populate if a Reply-to address is provided on the bounce handling account. Please note that if any recipients reply back to the email campaign, it will be sent to this email address on the bounce handling account by default. You can override the Reply-to address for the campaign to a different one so that any replies can be sent to a specific email address where it can be better monitored.
- Click the Save button to complete the creation of the Email Marketing record.



## Creating Email Templates

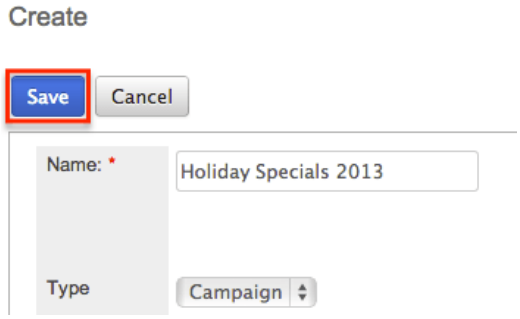
Email templates contain the design and content of the emails your campaign will send. Placeholder variables can be added to the template for field values like the target name so you can personalize the email to your recipients. Creating an email template through the Campaigns module rather than via the Emails module sets the template's type to "Campaign" and allows you to add redirect and opt-out tracker URLs.

Use the following steps to create an email template from the Email Marketing record:

1. While creating or editing your campaign's Email Marketing record, click "Create" to the right of the Email Template dropdown.
   
   
2. Enter the appropriate values for the fields in the pop-up window. The required field is marked with a red asterisk and must be completed.
   - Name : Enter an internal name for the email template.
   - Teams : Select the Sugar team(s) assigned to the email template.
   - Type : This will automatically populate as "Campaign".
   - Description : Enter a description or other information about the template.
   - Insert Variable : Insert variables or placeholders into the template. For more information regarding inserting variables, please refer to the Inserting Variables section.
   - Insert Tracker URL : Insert a tracker URL or opt-out link into the template. For more information regarding inserting tracker URLs, please refer to the Inserting Tracker URLs section.
   - Subject : Enter the subject of the emails that will be sent.
   - Body : Enter the body of the emails that will be sent.
3. Using the TinyMCE functions, add simple formatting to your email's content. For more advanced customization you can click the HTML button in the top left to access and edit the generated HTML code.
   Note: Only inline CSS may be used in email templates. Inline CSS is a method of using CSS within your HTML content instead of storing it in an external CSS file. So, every HTML element must be styled using inline CSS by virtue of the "style=" declaration.




4. Click "Save" to preserve your changes to the email template.

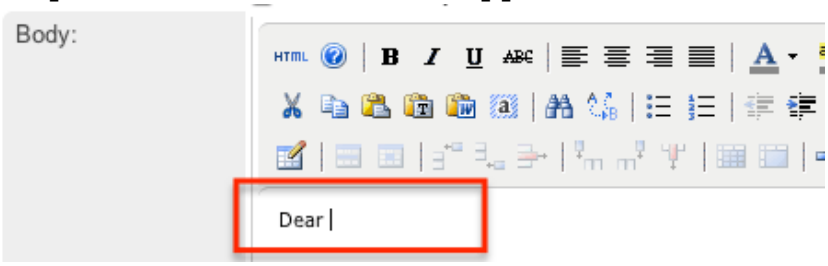



## Inserting Variables

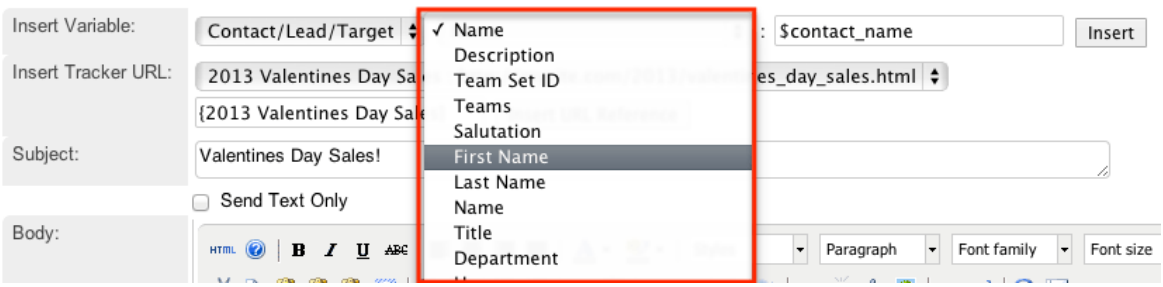
When constructing the subject and body of your email, Sugar allows you to insert variables, or placeholders, into the template that will be populated with the record's information for that variable.

Use the following steps to insert a variable for the recipient's first name into the template:

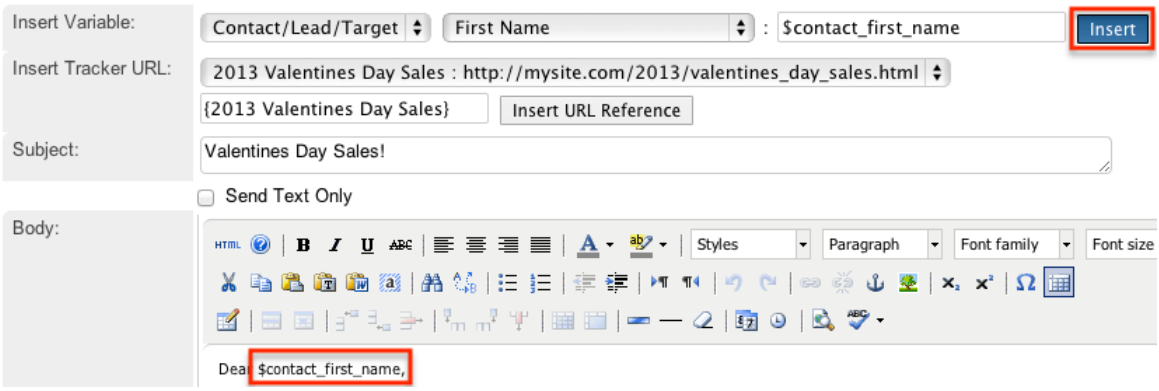
1. Click to place your cursor on the location in the subject or body where the recipient's first name should appear.




2. In the Insert Variable row, the first dropdown defaults to "Contact/Lead/Target" which will allow you to insert fields from the associated person-type recipient's record.
3. Set the second dropdown to the desired field (e.g. First Name) from the modules selected in the first dropdown.



4. Click the Insert button to insert the generated variable name to your subject or body at your cursor's location.

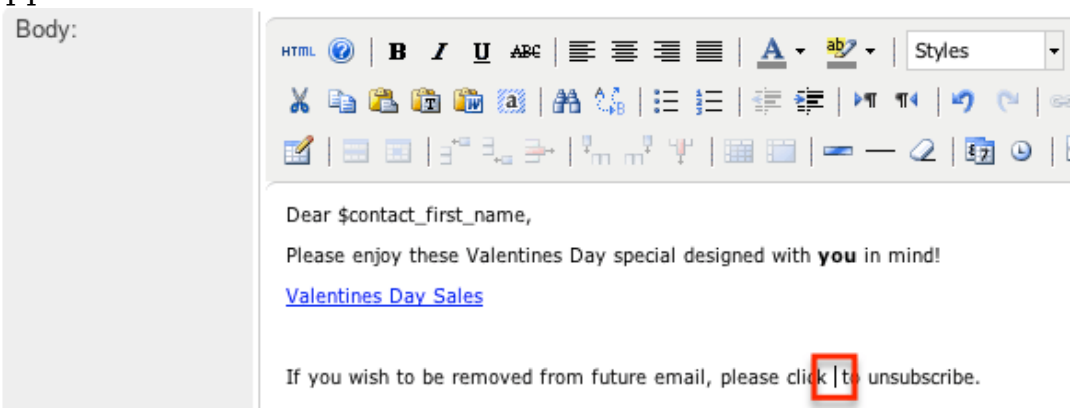



Inserting Tracker URLs

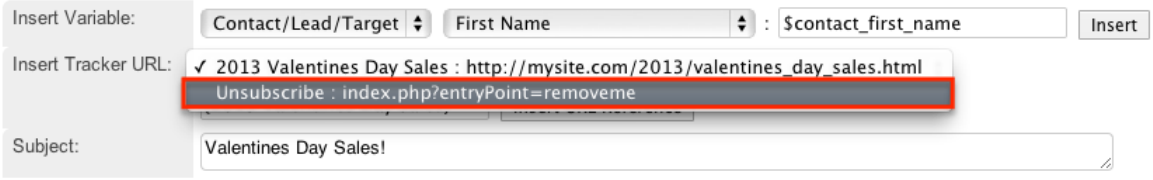
When constructing the body of your email, Sugar also allows you to insert redirect or opt-out tracker URLs.

Use the following steps to insert a tracker URL or opt-out link into the template.

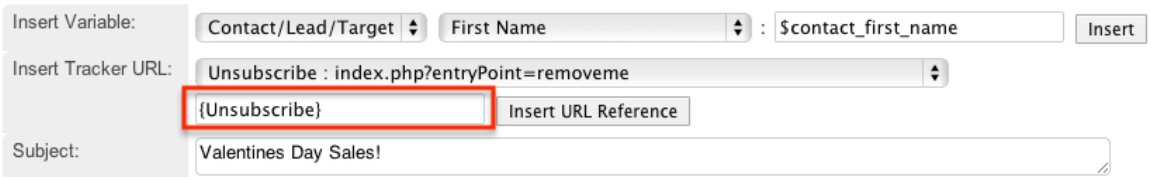
1. Click to place your cursor on the location in the body where the link should appear.



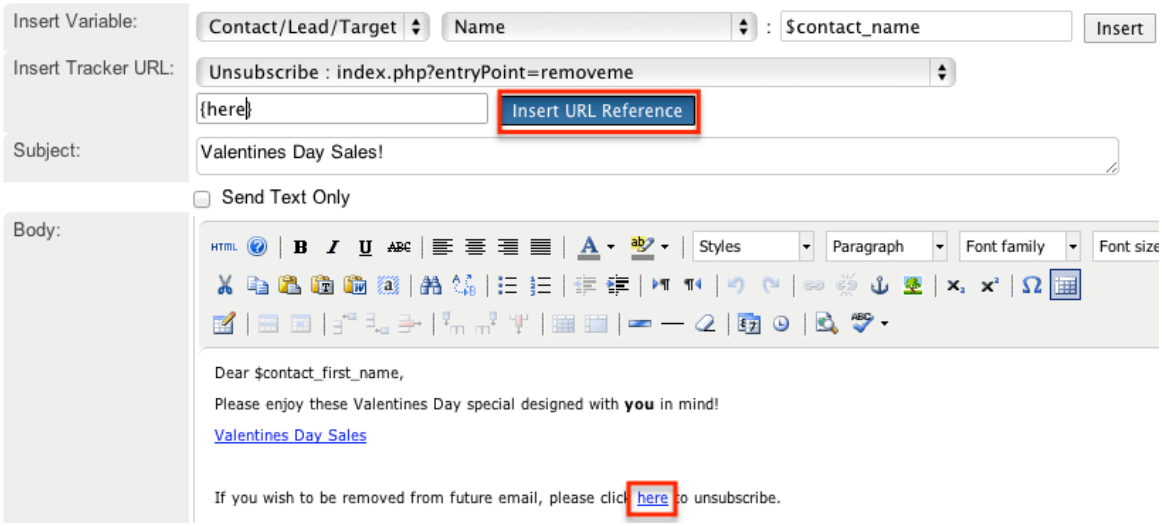

2. Select the link you wish to add from the Insert Tracker URL dropdown. Note: For more information on creating tracker URLs, please refer to the Creating Tracker URLs section.




3. Type the text you wish to appear as a link between the curly brackets in the text box to the right of the dropdown.




4. Click the Insert URL Reference button to place the link in the body of the email where your cursor is located.

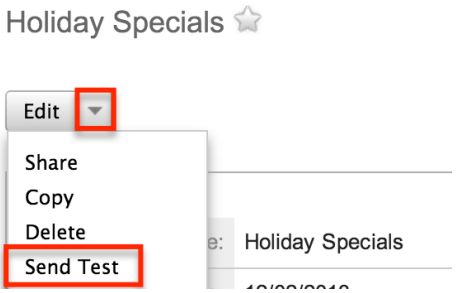



## Testing Campaigns

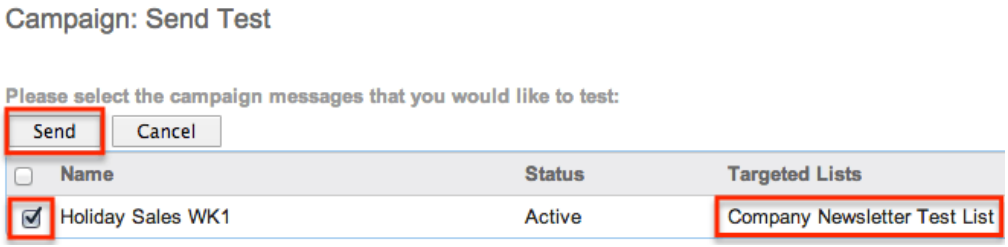
Before you launch an email or newsletter campaign, it is recommended that you perform tests to check how different email clients display the campaign message. A test-type target list must be selected under the Target Lists subpanel as well as in the Email Marketing record in order to test the campaign.

Note that in test mode, the system disables your suppression lists allowing the campaign message to be sent to targets on your suppression-type target lists. The system also disables checks for duplicate email addresses thereby allowing users to send a message multiple times to the same recipients.
Use the following steps to test an email-based campaign:

1. Navigate to a campaign record's detail view.
2. Select "Send Test" from the Actions menu.



3. Select the Email Marketing record and test target list combination that you would like to test and click "Send".
   Note: If an Email Marketing record does not have a test-type target list associated to it, then the Targeted Lists section will remain empty and no test emails will be sent.

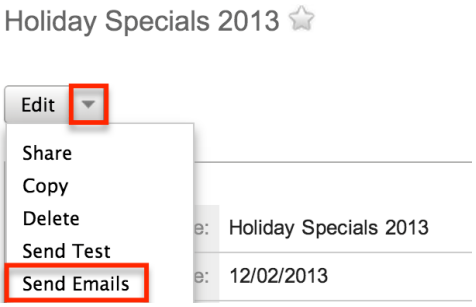



You can send the campaign to the test target list multiple times by clicking the Delete Test Entries button on the View Status page. You will need to do this after each test in order to delete the log entries on the campaign status and allow Sugar to send to the test list recipients again. Please note that sending to these recipients again will be prevented until the previous test's entries have been deleted. Also, please be sure that the test entries are all deleted once the campaign is ready to be sent so that the statistics from the test will not be included in the actual campaign's results.

## Sending Campaigns

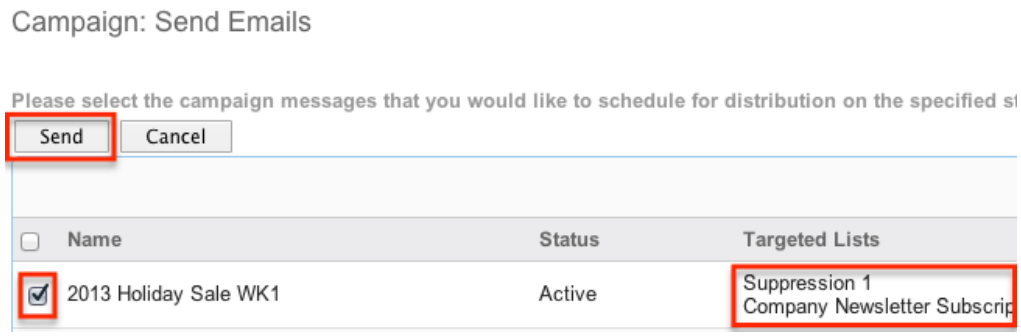
Once the Sugar email settings are configured and your campaign has been tested successfully, you are now ready to send the campaign. Upon sending a campaign, the emails are queued to be sent out in intervals. The administrator can configure how many emails are sent and when to send them. For more information on the relevant configurations, please refer to the Prerequisites section.
Use the following steps to send an email-based campaign:

1. Navigate to a campaign record's detail view.
2. Select "Send Emails" from the Actions menu.




3. Select the Email Marketing record and default target list that you would like to receive the email campaign then click "Send".
   Note: If the email marketing record does not have a default-type target list

associated to it, then the Targeted Lists section will remain empty and no emails will be sent.

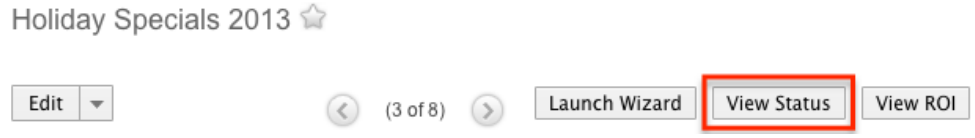



The specified start date and time on the email marketing record must have passed before the campaign will be queued for delivery. Once the emails enter the queue in Admin > Email Queue, the relevant scheduler will send the emails in set batches on an interval configured by an administrator. For more information on the email queue, please refer to the Email documentation in the Administration guide. For more information on the schedulers used by the Campaigns module, please refer to the Prerequisites section.

## Viewing Campaign Status

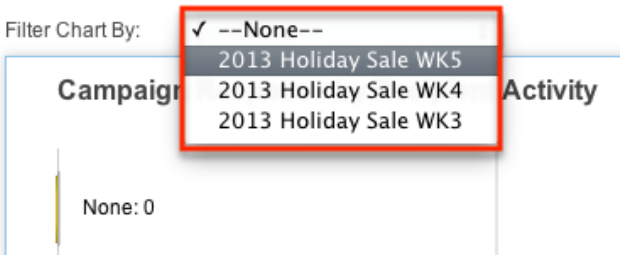
After you launch a campaign, you can view its results on the Campaign Status page to gauge its impact and progress. The Campaign Status page includes several subpanels, which display information such as the recipients who viewed the message, the recipients who clicked a tracker URL in the email, how many leads and contacts were created from the campaign, etc. This enables you to evaluate the effectiveness of the campaign.
Use the following steps to view the Campaign Status page:

1. Navigate to a campaign record's detail view.
2. Click the View Status button on the upper right of the page.




### Campaign Status Chart

This is a visual representation of the counts of your recipient's activities which are also detailed in the below subpanels. Use the dropdown to view a particular Email Marketing record's data or choose "--None--" to view the cumulative results of all of this campaign's sends.




## Message Queue Subpanel

The Message Queue subpanel shows the campaign emails waiting to be sent in the email queue. The emails will remain in the queue until the start time of the Email Marketing record has passed and the scheduler picks up and sends them in batches as specified in Admin > Campaign Email Settings. For more information on batch size, please refer to the Prerequisites section. For more information on monitoring this queue, please refer to the Email documentation of the Administration guide.




## Campaign Response Subpanels

The success of a campaign can be determined by analyzing the response statistics. Knowing how many of your targets saw your email, clicked its links, and became leads or contacts, for example, can provide insight for your campaign strategy.




The following subpanels measure different aspects of your recipient's responses to the campaign or a specific send of the campaign based on your selection in the Filter Chart By dropdown at the top of the page:

- Message Sent/Attempted : The list of campaign emails that were sent out to targets.
- Viewed Message : The list of targets who viewed the emails that were

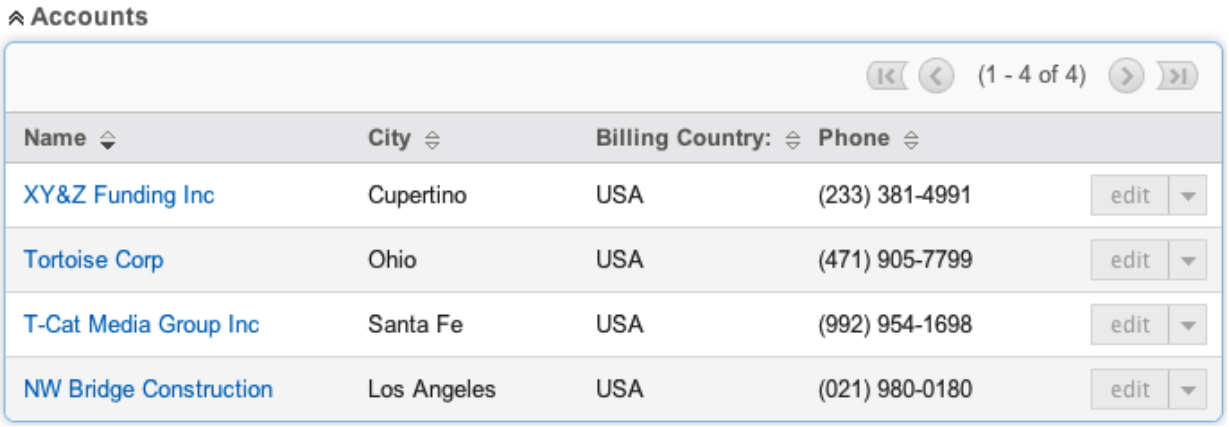
delivered. Sugar includes a very small, invisible image in each email. Each time the recipient downloads this image, Sugar records that they viewed the email.

- Click-thru Link : The list of targets who clicked on a redirect tracker URL in the email. This does not include opt-outs. For more information on redirect tracker URLs, please refer to the Creating Tracker URLs section.
- Leads Created : The list of leads who have been generated from a web-to-lead form assigned to this campaign record.
- Contacts Created : The list of contacts who have been converted from a lead generated from a web-to-lead form assigned to this campaign record.
- Bounced Messages, Invalid Email : The list of campaign emails that bounced back due to invalid email addresses.
- Bounced Messages, Other : The list of campaign emails that failed to send despite having valid email addresses. After six failed attempts, these messages will be removed from the queue.
- Opted Out : The list of targets who chose to opt out of receiving campaign emails by clicking the opt-out link.
  Note: Opt-out links for newsletter-type and email-type campaigns behave differently. When a target clicks an opt-out for a newsletter-type campaign, they are prevented from receiving future emails from that specific campaign by being added to the campaign's suppression-type list. When clicking an opt-out for an email-type campaign, they are prevented from receiving future emails from any campaign by having their email address marked as "Opted Out" on their Sugar record.
- Suppressed by Email Address or domain : The list of email addresses which were not sent the campaign email because they had previously opted out, were a member of a suppression list, or were invalid addresses.

Note: If you do not see the campaign response subpanels, the administrator may have disabled the Campaign Log subpanels for your entire Sugar instance. Reach out to your Sugar administrator to have the Campaign Log subpanels displayed. For more information on displaying and hiding subpanels throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

## Campaign Results Subpanels

The last three subpanels on the Campaign Status page can be used to demonstrate the broader effects of the campaign by showing what new accounts, leads, and opportunities were generated as a result of the effort.



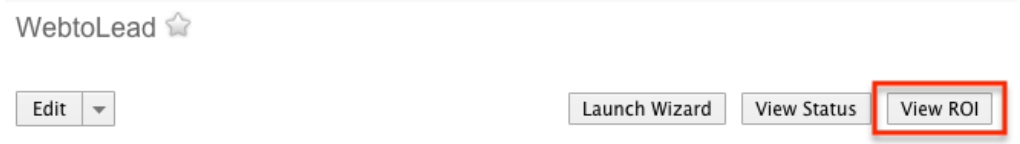

- Accounts : The list of accounts that are related to this campaign record either through lead generation and then conversion or manually related through the Campaign field on the account's record view.
- Leads : The list of leads that are related to this campaign record either through lead generation or manually related through the Campaign field on the lead's record view.
- Opportunities : The list of opportunities that are related to this campaign record either through lead generation and then conversion or manually related through the Campaign field on the opportunity's record view.

## Viewing Campaign ROI

For campaigns (Email and Newsletter) that are executed through Sugar, you can view the campaign's return on investment by clicking the View ROI button in the Campaigns detail view. The return on investment chart displays the actual revenue you earned through the campaign versus the estimated expected revenue. It also reflects the actual cost you incurred by executing the campaign versus the budget that you set for the campaign. The budget, actual cost, and expected revenue amounts entered in the campaign overview screen are displayed as bars in the campaign return on investment chart. The actual revenue is calculated from the campaign's related opportunities that have a sales stage of "Closed Won".

Use the following steps to view a campaign's ROI:

1. Navigate to a campaign record's detail view.
2. Click the View ROI button on the upper right of the page.



# Viewing Campaigns

There are various options available for viewing campaign records in Sugar including via Campaigns list view, Campaigns detail view, Campaigns Recently Viewed menu, dashlets, and reports. Please note that you will only be able to see campaign records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

## Viewing Via List View

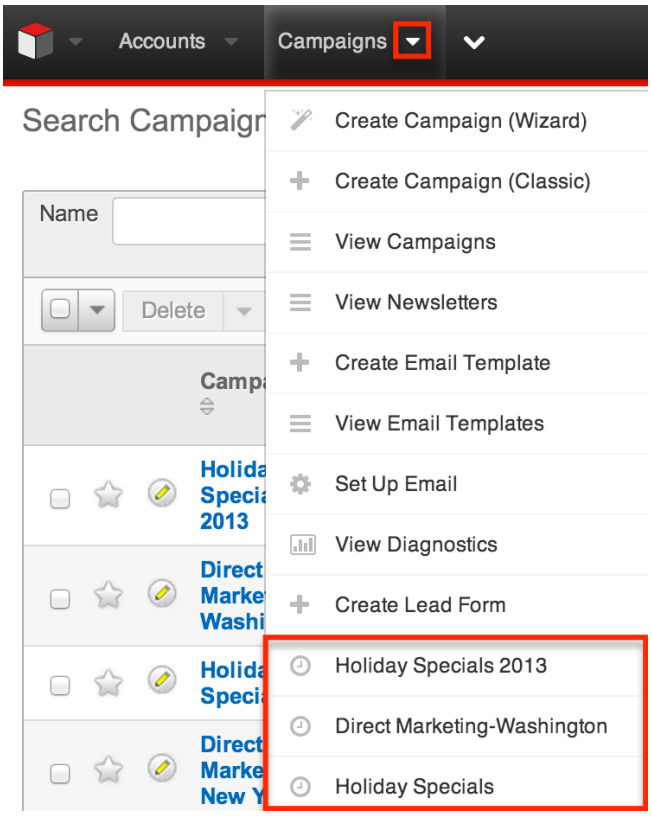
The Campaigns list view displays all campaign records meeting the current search criteria. To access the list view, simply click the Campaigns tab. While list view shows key campaign fields, you can click the campaign's name to open the record in detail view. For more information on viewing campaigns via list view, please refer to the Campaigns List View section.

## Viewing Via Detail View

The Campaigns detail view displays thorough campaign information including all campaign fields followed by subpanels of the campaign's related records. The detail view can be reached by clicking a contact record's link from anywhere in the application including from the Campaigns list view. For more information on viewing campaigns via detail view, please refer to the Campaigns Detail View section.

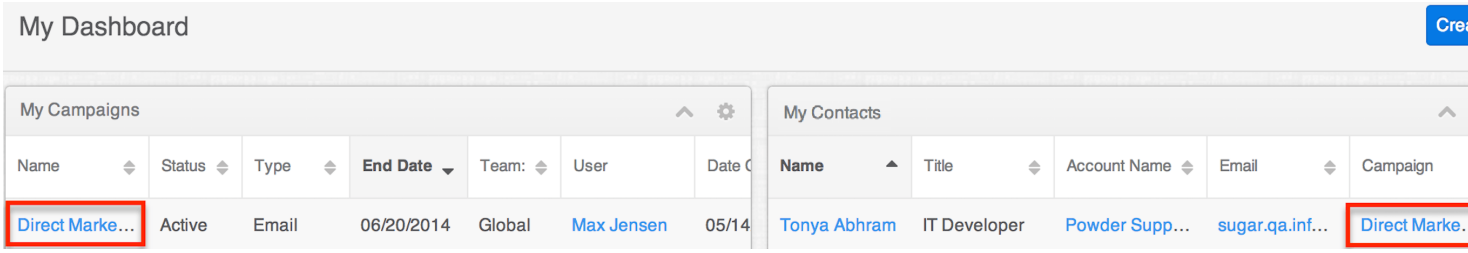
## Viewing Via Recently Viewed

As you work, Sugar will keep track of which campaigns you have recently viewed. Click the Actions menu in the Campaigns Module Tab to see a list of your most recently viewed campaigns and click each name to open the Campaigns detail view.




## Viewing Via Dashlets

Sugar dashlets allow users to get a quick view of various records, reports, etc. Dashlets may be added to a user's Home page or to the intelligence pane for modules (e.g. Accounts) using the Sidecar user interface. You can view campaign information in List View dashlets specific to the Campaigns modules (e.g. My Campaigns dashlet), as well as List View dashlets based on other modules such as "My Contacts". Clicking a campaign's name from any dashlet will open the Campaigns detail view. For more information on using dashlets and viewing campaign records via dashlets, please refer to the Intelligence Pane documentation.




## Viewing Via Reports

Users with access to the Reports module have the option to build, generate, and manage various reports in Sugar. You can generate reports to gather key data

regarding your campaigns plus information for related records. You also have the option to filter the report based on the campaign and related module(s) to only include records that is of importance. The display columns will only show data for fields (e.g. campaign name, type, related leads etc.) that you choose specifically when creating the report. Once the report is run, you will be able to view the campaign record's detail view by clicking the campaign's name in the report results. Please note that you can only click into campaign records for Rows and Columns Report and Summation Report with Details Report type. The other two report types (Summation Report, Matrix Report) are summation reports and do not include display columns with hyperlinks (e.g. Campaign Name) to allow for navigating to campaign record detail views. For more information on viewing campaign records via the Reports module, please refer to the Reports documentation.

## Searching Campaigns

The Campaigns list view includes a Basic and Advanced Search to help you find your records easily and effectively in a module-specific manner. Once the search is performed, the relevant search results will be displayed in the Campaigns list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %offer). This will pull up any record that has the word "offer" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

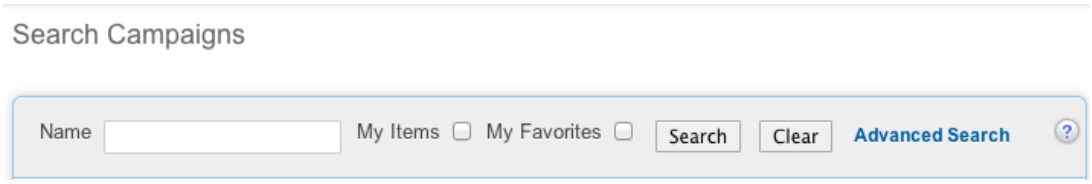
### Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.

The buttons and checkboxes available in the Basic Search panel have the following functions:

- Search : Click the Search button or hit Return/Enter key to perform the

search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Items : Select this box to return only records assigned to you.
- My Favorites : Select this box to return only records you have marked as favorites.




When you perform a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Items" and enter a campaign's name, Sugar will only return campaign records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all campaign records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters.

Please note that you will only be able to see campaign records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

Administrators can configure what fields appear on the Campaigns Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Advanced Search

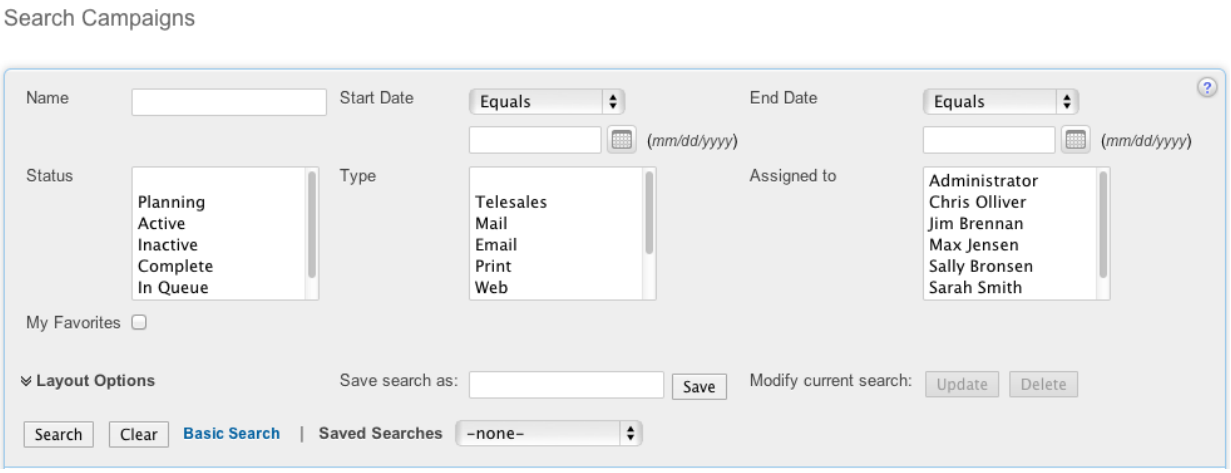
Advanced search offers a more in-depth search experience than Basic Search including additional fields, layout options, and saved search capability. From the Advanced search panel, you can click "Basic Search" for simplified searching.

The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Favorites : Select this box to return only records you have marked as favorites.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the Layout Options section of

the Search documentation.

- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section of the Search documentation.




When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select "My Favorites" and enter in a campaign's name to search, Sugar will only return campaign records with a matching name that you have marked as favorites. When searching by a multiselect or dropdown field (e.g. "Assigned to"), however, Sugar will return records matching any of these selections. Once the search completes, the relevant results will populate in the list view below the search panel. To see all campaign records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters.

Please note that you will only be able to see campaign records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Administrators can configure what fields appear on the Campaigns Advanced Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search may be used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.




To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword.

For more information on using and configuring Global Search, please refer to the section of the Search documentation.
Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the Search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation.

Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

## Campaigns List View

The Campaigns list view displays all campaign records meeting the current search criteria to which your user has access. You can view the basic details of each campaign within the field columns. Please note that you will only be able to see campaign records as allowed by your team membership, user access type, and assigned roles.

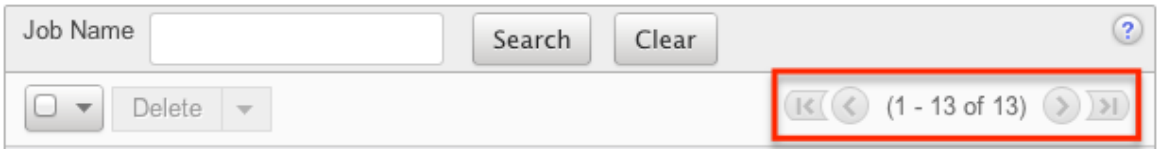
For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.
You have the option to change what fields are displayed in list view by configuring your layout options in the Campaigns Advanced Search.

For more information on configuring your list view, please refer to the Layout Options section of the Search documentation. Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing list view layouts, please refer to the Studio documentation in the Administration guide.

### Pagination

List view displays the current search results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. To the right just below the search panel you can see which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of your current results.

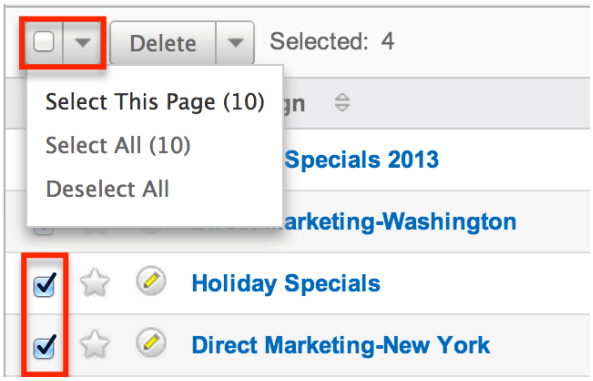
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.




## Checkbox Selection

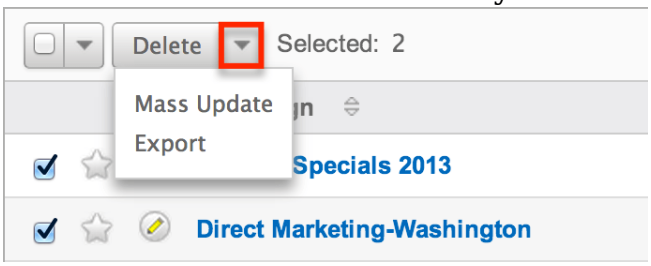
You can perform several actions on campaign records directly from the list view by first selecting the desired records. To select individual campaign records on the Campaigns list view, mark the checkbox on the left of each row. To select or deselect multiple campaign records on the list view, use the options in the checkbox dropdown menu:

- Select This Page : Selects all records shown on the current page of campaign results.
- Select All : Selects all records in the current search results across all pages of campaign results.
- Deselect All : Deselects all records that are currently selected.




## Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.

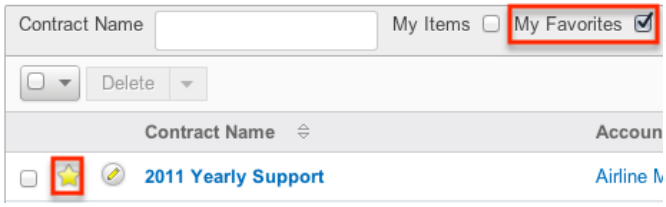



The options in the actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Delete | Delete one or more campaigns at a time |
| Mass Update | Mass update one or more campaigns at a time |
| Export | Export one or more campaigns to a CSV file |

## Favorite Designation

Users have the option to mark campaign records as favorites via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often as they can easily be accessed via search or from the Campaigns module tab. In the Campaigns list view, the star on the left of each campaign's row is yellow once marked to indicate a favorite campaign. For more information on marking records as favorites, please refer to the Favoriting Campaigns section of this documentation.



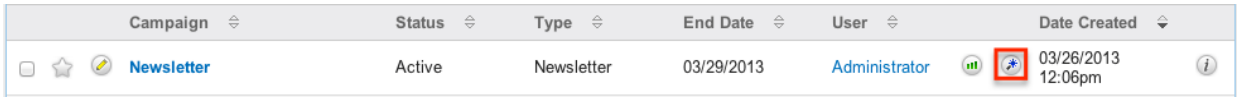

## Campaign Status

Each campaign's status page may be accessed directly from the list view by clicking the Chart icon on the right of each list view row. For more information on the campaign status page, please refer to the Campaign Status section of this documentation.



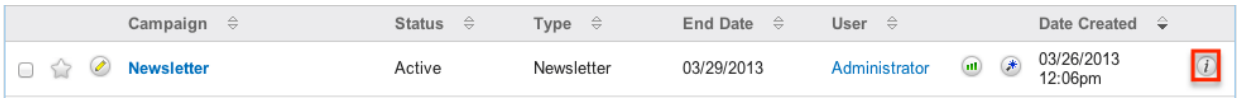

## Campaign Wizard

The Campaign Wizard may be directly accessed from the list view by clicking the Wand icon on the right far right of each list view row. For more information regarding the Campaign Wizard, please refer to the Using the Campaign Wizard section of this documentation.



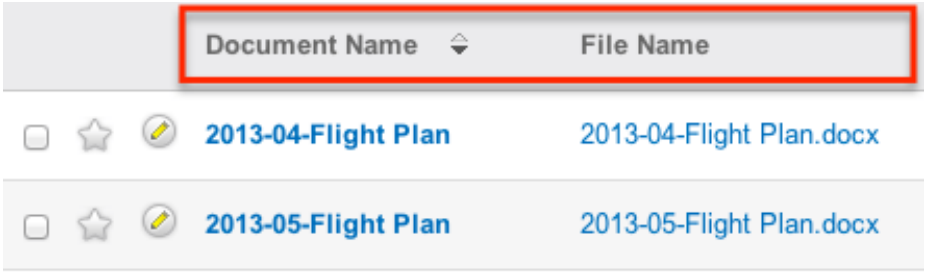

## More Information

Additional details for each campaign can be viewed by clicking the "i" to the far right of each list view row. This provides users a quick view of additional campaign information in addition to what appears in the display column fields. The resulting pop-up window will show the Start Date, Description, and Objective fields by default. The list of fields appearing here may only be configured through a code-level customization.




## Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time. You can also set a default order-by column using the layout options in Advanced Search. For more information on setting a default column sort, please refer to the Layout Options section of the Search documentation.

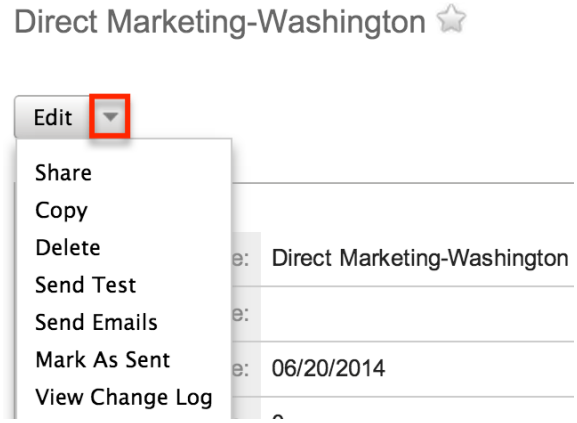


# Campaigns Detail View

The Campaigns detail view displays thorough campaign information including all campaign fields which are grouped by default into the Overview and Other panels. You can also view a campaign's related records which appear in subpanels beneath the campaign fields. The detail view can be reached by clicking a campaign record's link from anywhere in the application including from the Campaigns list view.
Please note that you will only be able to view a campaign record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Actions Menu

The actions menu on the top left of each campaign's detail view allows you to perform various actions on the current record. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the System documentation in the Administration guide.



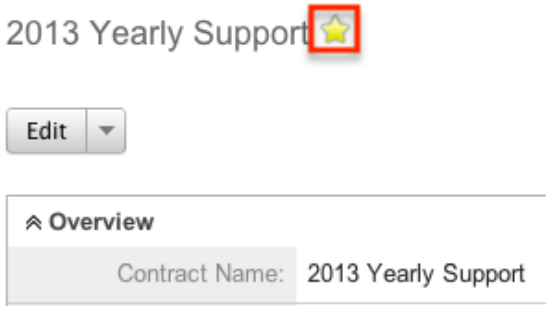

The options in the actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this campaign |
| Share | Share a link to this campaign via email |
| Copy | Duplicate this campaign |
| Delete | Delete this campaign |
| Send Test | Send test emails for this campaign |

| | |
|---|---|
| Send Emails | Send all emails for this campaign |
| Mark As Sent | Mark a non-email campaign as being sent |
| View Change Log | View a record of changes to this campaign |

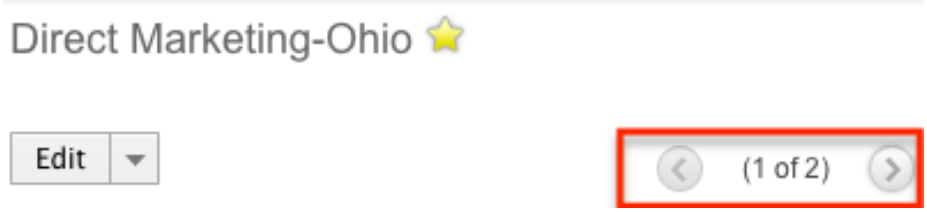
## Favorite Designation

Users have the option to mark campaign records as a favorite via the detail view as well as the list view. This allows users to group records that are important or will be viewed often as they can easily be accessed via search or from the Campaigns module tab. In the Campaigns detail view, the star on the right of the campaign's name is yellow once marked to indicate a favorite campaign. For more information on marking records as favorites, please refer to the Favoriting Via Detail View section of this documentation.




## Next or Previous Record

On the upper right of the Campaigns detail view, there are two buttons that allow you to page through each campaign in the Campaigns list view's current search results. Clicking the Previous button displays the previous campaign of the current search results while clicking the Next button displays the next campaign of the current search results. The text in between shows which campaign result you are currently viewing within the total number of current results.




## Related Record Subpanels

Every campaign record's detail view will display subpanels which list related

records from other modules. Users with administrator or developer access have the ability to change the fields (e.g. Name, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.

Related record subpanels allow the following operations to be performed. Please note that administrators in Sugar can change the subpanel's Action menu to be displayed as separate buttons instead of a dropdown via Admin > System Settings. For more information, please refer to the System documentation in the Administration guide.

- To view the details of a related record, click the record's name in the subpanel to open it in detail view.
- To relate an existing record to the campaign, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the campaign, click "Create" on the upper left of the subpanel, then complete the Record View layout and click "Save".
- To edit the campaign's related record, click either the record's name or the View button to the far right of the record's row to open the record view and edit as necessary.
- To delete the campaign's relationship to a record, choose "Unlink" from the Actions menu on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

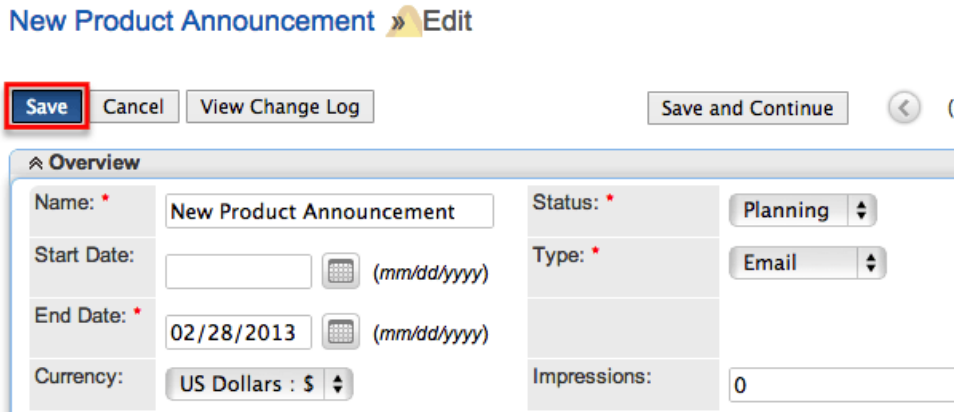



Please note that administrators can prevent users from moving subpanels to different locations in the detail view. For more information on preventing rearranging of subpanels, please refer to the System documentation in the Administration guide. Check with your system administrator if you are not able to rearrange your subpanels.

## Editing Campaigns

Campaigns may be edited at any time to update or add information to the record.

You can make changes to existing campaign records via the Campaigns edit view. Edit view is available within the Campaigns module and includes all of the Campaign fields you should need.

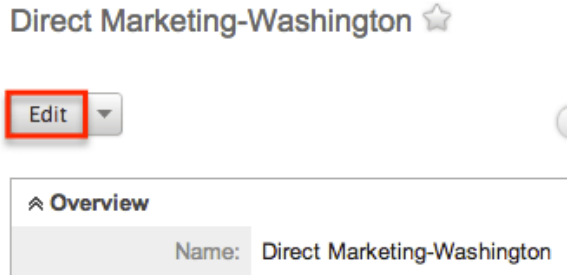



Please note that your ability to edit campaigns in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure the Campaigns edit view via Admin > Studio. For more information on configuring these layouts, please refer to the Studio documentation in the Administration guide.

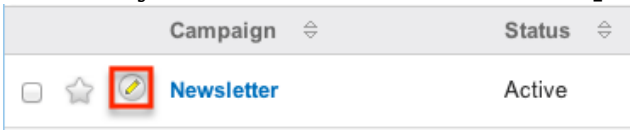
## Editing Via Detail View

You can edit campaigns via the detail view by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary field, then click "Save" to preserve your changes.




## Editing Via List View

You can edit campaigns via the list view by clicking the pencil icon to the left of each campaign's name. The edit view layout will open and you can update the necessary fields then click "Save" to preserve your changes.



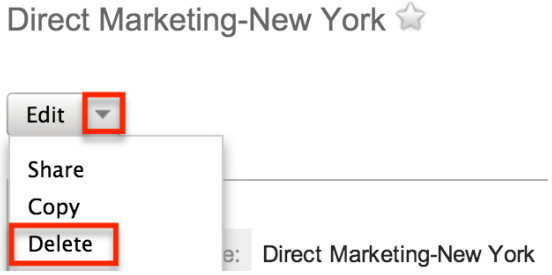
# Deleting Campaigns

If a campaign record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Campaigns detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting campaign records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.
Please note that your ability to delete campaigns may be restricted by a role.

For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

## Deleting Via Detail View

Use the following steps to delete a campaign record via the detail view:

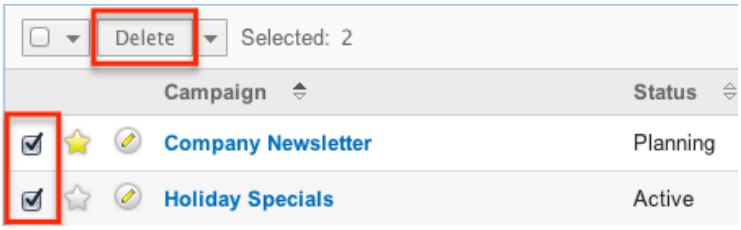
1. Navigate to a campaign record's detail view.
2. Select "Delete" from the Actions menu.


3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

## Mass Deleting Via List View

Use the following steps to delete one or more campaign records via the list view:

1. Navigate to the Campaigns list view by clicking the Campaigns module tab.
2. Use the Basic or Advanced Search to find the campaign records you wish to delete.
3. Select the desired campaign records individually or using the checkbox dropdown's options.
4. Choose "Delete" from the Actions menu.

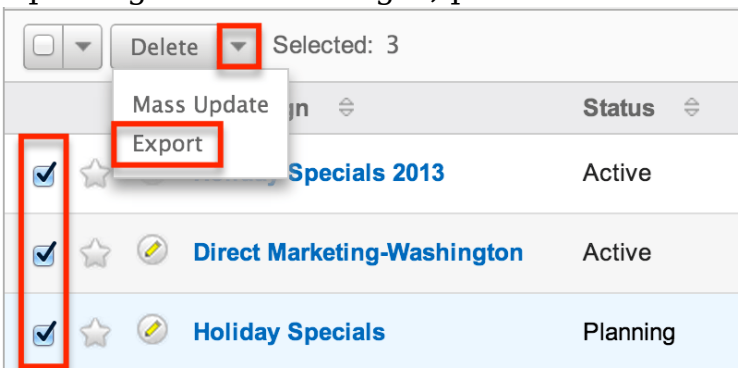



5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

## Exporting Campaigns

Sugar's Export option allows users to download all fields for the selected campaigns to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use campaign data with other software such as Microsoft Excel. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of campaign records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Campaigns may be exported from the Campaigns list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for campaigns and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.




Please note that your ability to export campaigns from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

## Mass Updating Campaigns

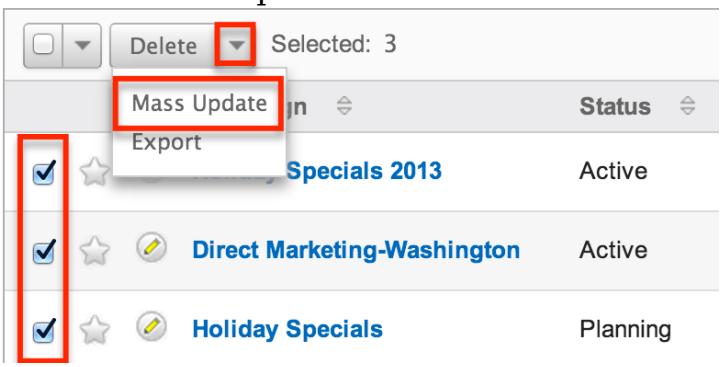
Mass Updating allows users to make the same change to multiple campaign records at once from the Campaigns list view. Users with administrator or

developer access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide. Due to the PHP memory limitations on the server, there may be occasions when the application times out while mass updating a large number of campaign records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

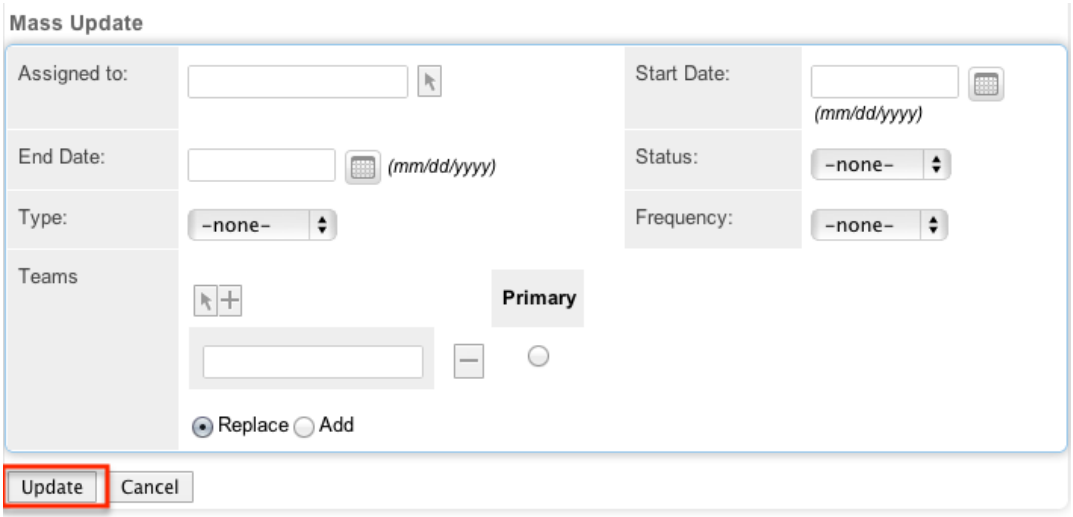
Please note that your ability to mass update campaigns may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

Use the following steps to mass update campaign records from the list view:

1. Navigate to the Campaigns list view by clicking the Campaigns module tab.
2. Use the list view's Basic or Advanced Search to find campaigns you wish to modify.
3. Select the desired campaigns individually or using the checkbox dropdown's options.
4. Choose "Mass Update" from the Actions menu.




5. Scroll to the Mass Update panel and set values for the fields you wish to alter. Note: For the Teams field, use "Replace" to remove existing team assignments before adding those specified here. Use "Add" to add the teams specified here to any existing team assignments.




6. Click "Update" to save the changes to all of the currently selected campaign records.

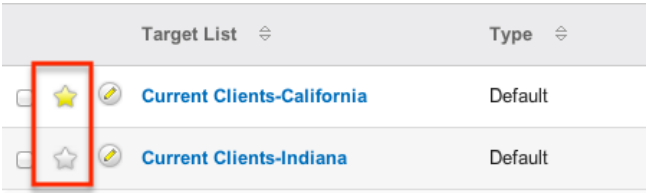
## Favoriting Campaigns

Each Sugar user has the option to designate their own favorite campaigns which are important or will be viewed often. Favorite records can then be easily be accessed via search or from the Campaigns module tab. Once records are marked as favorites, use the My Favorites checkbox in the Campaigns Basic or Advanced Search to retrieve your favorites or select from your most recent favorites directly from the Campaigns module tab .

### Favoriting Via List View

Use the following steps to mark records as favorites via the Campaigns list view:

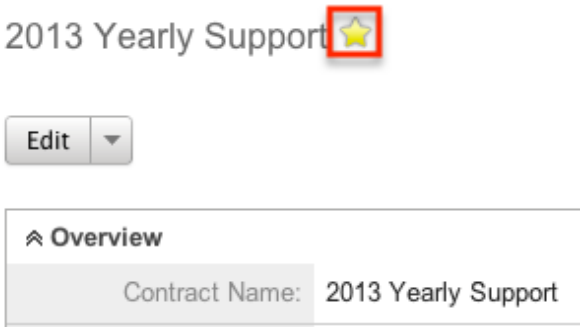
1. Navigate to the Campaigns list view by clicking the Campaigns module tab.
2. Use the Basic or Advanced Search to find the campaign records you wish to mark as favorites.
3. Click the star icon on the left of each desired campaign's row.
4. To remove the campaign as a favorite, click the star again to revert it to white.



### Favoriting Via Detail View

Use the following steps to mark records as favorites via the Campaigns detail view:

1. Navigate to a campaign record's detail view.
2. Click the star icon to the right of the campaign's name in the upper left of the detail view to designate it as a favorite.
3. To remove the campaign as a favorite, click the star again to revert it to white.




## Sharing Campaigns

Individual Campaign records can be shared with other users in your organization by sending an email with the record's link directly from the detail view. In the campaign's detail view, select "Share" from the Actions menu which will open a Compose Email window including the URL of the campaign record. Enter the recipient(s) email address in the To field then click "Send".



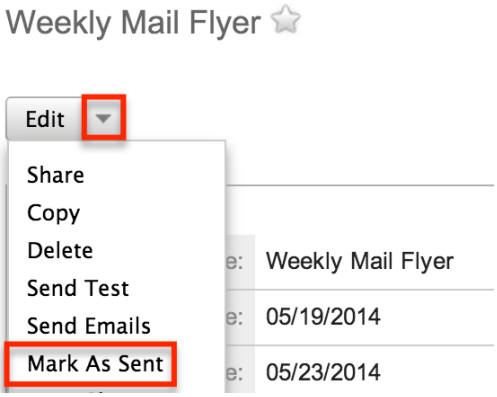

Users can simply click the link in the email to access the campaign record in Sugar. Please note that the user must be logged into Sugar in order to access the record. Users will only be able to view the shared record as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

## Marking Campaigns As Sent

When launching a non-email campaign such as a telesales or mail campaign, Sugar will need to be told that the campaign has been sent since the sending is performed outside of the application. Once you mark the campaign as sent, the Campaigns subpanel on the detail view of each member of the campaign's target populates with a row indicating an activity of "Message Sent" to indicate that the campaign material was sent to that individual. The Campaign's status page will then display these recipients in the Message Sent/Attempted subpanel. For more information on the Campaigns status page, please refer to the Viewing Campaign Status section of this documentation.

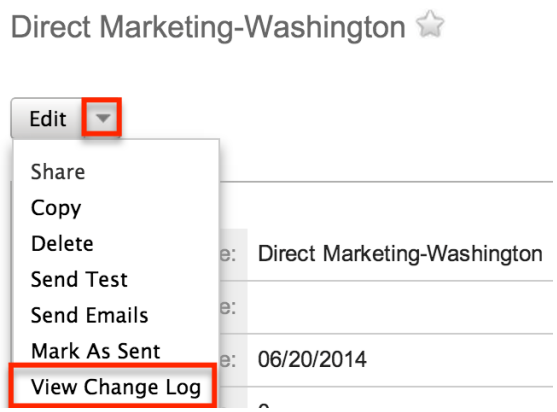
Use the following steps to mark a campaign as sent via the Campaigns detail view :

1. Navigate to a campaign record's detail view.
2. Select "Mark As Sent" from the Actions menu.




## Viewing Campaign Change Logs

Changes made to each campaign record are tracked over time, and users are able to view the history of changes via the change log in each campaign's detail view. To view the change log, navigate to a campaign in detail view and select "View Change Log" from the Actions menu. Please note that only fields marked as "Audit" in Admin > Studio will be displayed in the change log. For more information on designating for audit, please refer to the Studio documentation in the Administration guide.




## Using the Campaign Wizard

You can use the Campaign Wizard to guide you through the process of creating a campaign, however it is recommended to create and modify campaigns using the classic interface instead. For instructions on creating and editing campaign records using the classic interface, please refer to the Creating Campaigns and Editing Campaigns sections of this documentation.

Last Modified: 01/12/2017 01:25pm

# Web-To-Lead Forms

## Overview

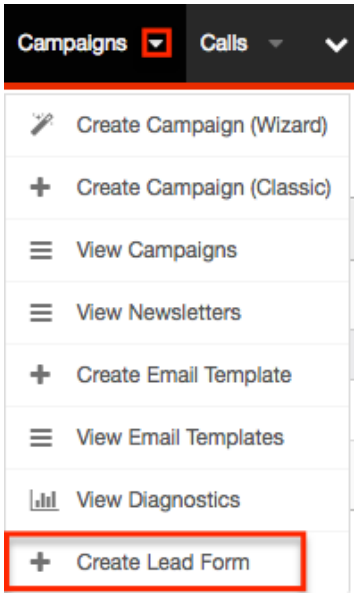
Sugar provides a simple way to allow visitors to your website or other online locations to become leads in your Sugar instance. You can generate a web-to-lead form in Sugar and place the form on an external website. When a visitor to your site completes and submits the form, their information is entered into Sugar as a new lead record. You can use this lead information to generate more opportunities for your organization.

## Creating Web-To-Lead Forms

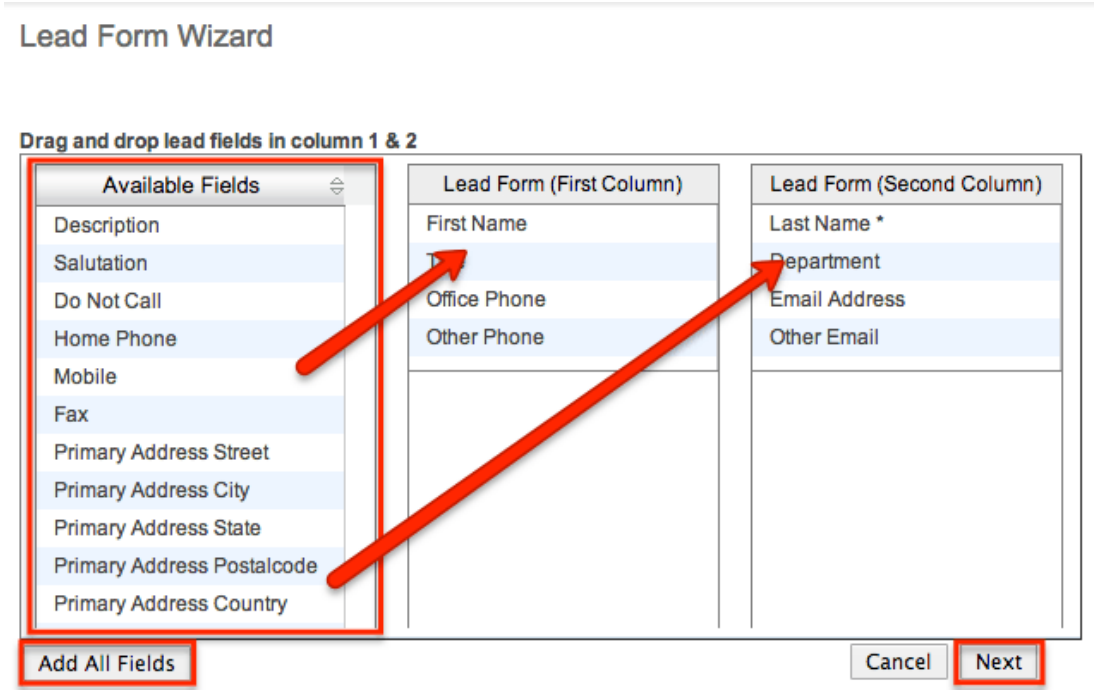
The Sugar Campaigns module contains a lead form wizard to assist in generating a custom web-to-lead form. Use the following steps to create a web-to-lead form via the Campaigns module:

1. Click the triangle in the Campaigns module tab and select "Create Lead

Form".



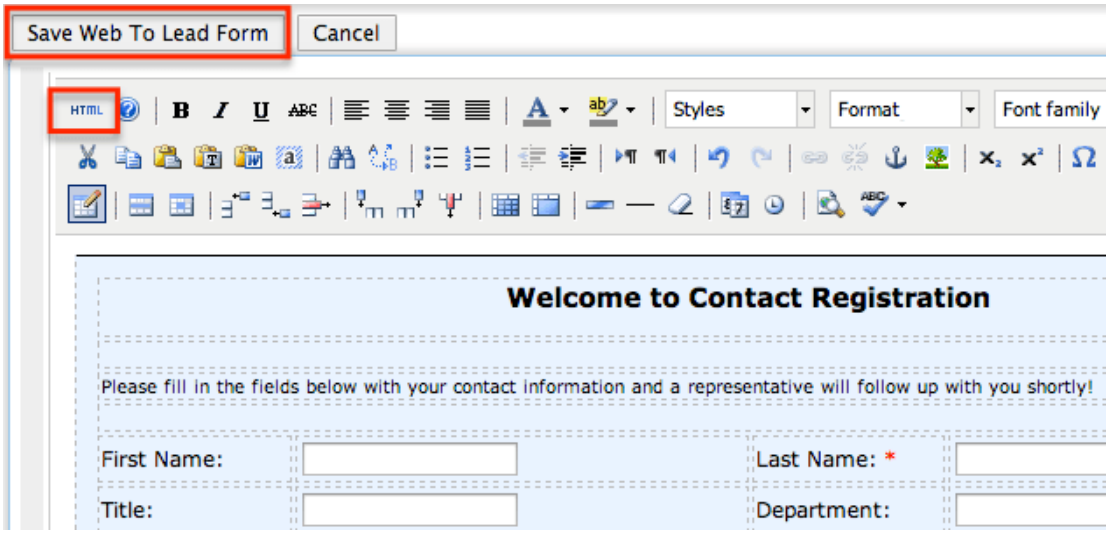

2. Click and drag the desired fields from the Available Fields list to the Lead Form (First Column) or Lead Form (Second Column) lists.
   Note: You can also choose to add all fields to either column by clicking the Add All Fields button.
3. All required fields marked with an asterisk must be added to a column on the lead form prior to continuing.
4. Once the fields you desire have been moved to the appropriate columns, click the Next button to continue.




5. Enter appropriate values for the fields in the next page of the wizard:
   Form Header : This will be the title at the top of your form. A generic title has been populated; modify or remove this to suit your needs.
   Form Description : This will be a brief description of the form and will show below the form header, but before the form begins. A generic description has

been populated; modify or remove this to suit your needs.
Submit Button Label : Enter in the label for the button that will be used to complete the form. Submit is the default; you may change this to say "Sign Up", "Save", "Complete", or any other label to suit your needs.
Post URL : This is the location the form will send the data entered and is defaulted to your instance of Sugar. Select "Edit Post URL" to edit this field.
Note : If you change this location to be anything other than your Sugar instance then a lead will not be generated when the form is completed.
Redirect URL : This is the location your visitors will be directed to after completing the form. You may enter the location of your corporate website, a custom "Thanks for signing up" page, or any URL to suit your needs.
Note : Leaving this field empty will display a message that says: "Thank You For Your Submission".
Related Campaign : Use the Select button to enter an existing campaign that is related to this lead form. Leads generated from this form will automatically be associated to this campaign.
Assigned to : Use the Select button to enter the user to be assigned to the new lead record when the form is submitted. By default, this field is populated with the current user who is generating the form.
Team : Enter the name of the team that is allowed access to the leads generated from this form. To change the primary team, either enter the team name here or select the team. By default the primary team selected will be Global. More than one team can be assigned simultaneously. For more information on teams, please refer to the Team Management documentation.
Form Footer : The form footer displays the text entered here below the form inputs, but before the submit button.

6. All required fields are marked with a red asterisk and must be completed prior to continuing.
7. Once the necessary information is entered, click "Generate Form".
8. Sugar then generates the HTML needed for your form and shows you a preview in a TinyMCE editor. At this point you can continue to add text and images and change the layout of your form.
9. For more advanced customization you can click on the HTML button in the top left to access and edit the generated HTML code.
10. Once any additional changes have been completed, click "Save Web To Lead Form".

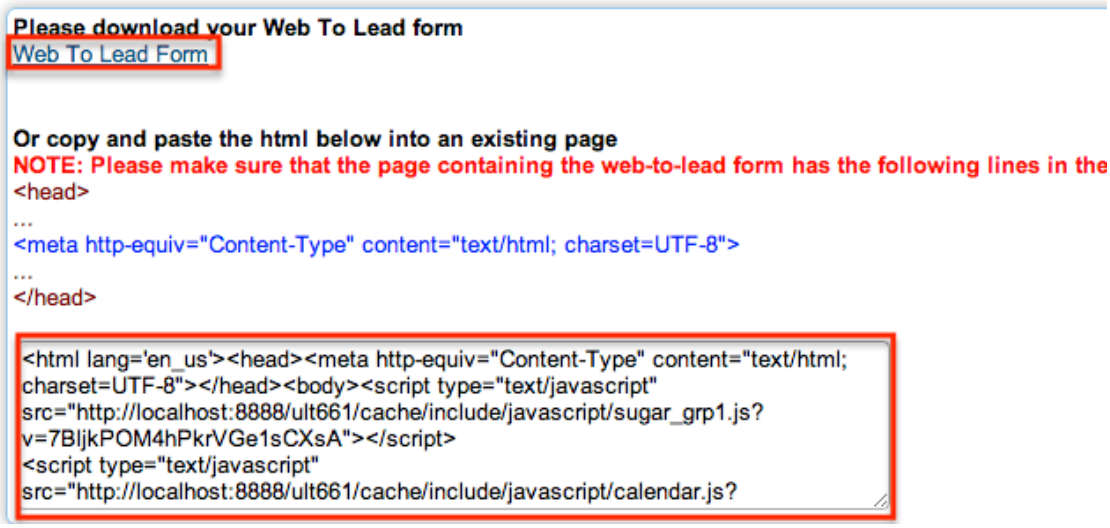



## Saving Web-To-Lead Forms

Since your web-to-lead form will be hosted outside of Sugar, you will need to save the generated HTML to a different hosting location. Your generated form will not be saved or accessible through Sugar after leaving this screen. If you need to add or remove fields to your form after generation, you will have to go through the steps to generate a new form.

Use the following steps to save your generated web-to-lead form:

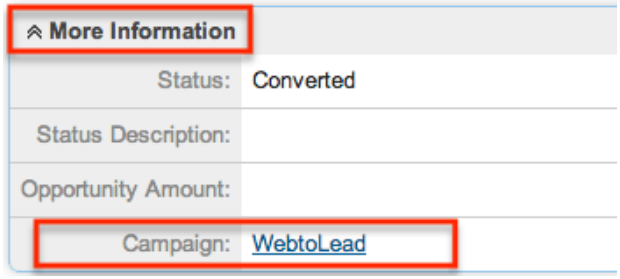
1. You may download the generated HTML file by clicking on the Web to Lead Form link.
2. This will download the HTML file to your local computer. Simply transfer this file to the final hosting destination.
3. Alternatively, you may copy the HTML directly out of the text box on this screen and add it to a preexisting HTML file of your choosing.



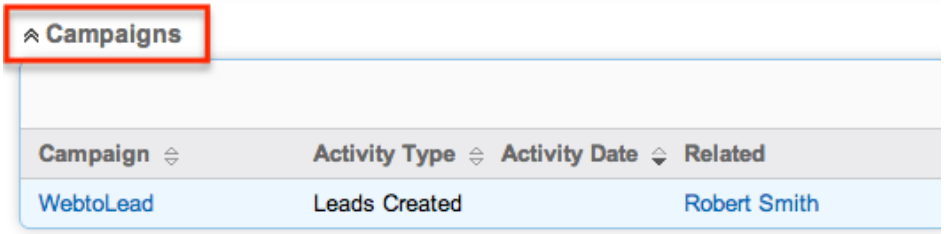
4. Once the web-to-lead form is accessible to your potential customers, include a link to the form on your corporate website, social media websites, or add as a tracker URL in a campaign. For more information regarding adding tracker URLs to a campaign, please refer to the Campaigns documentation in the Application guide.

## Lead Generation

Once a web-to-lead form is submitted the data entered in the form becomes a lead record in your instance of Sugar tied to the campaign selected during form generation. Leads can be converted to contacts, accounts, and opportunities. For more information on the Leads module, please refer to the Leads documentation in the Application guide.
The campaign selected during form generation is linked to the created lead via the Campaign field under the More Information panel:



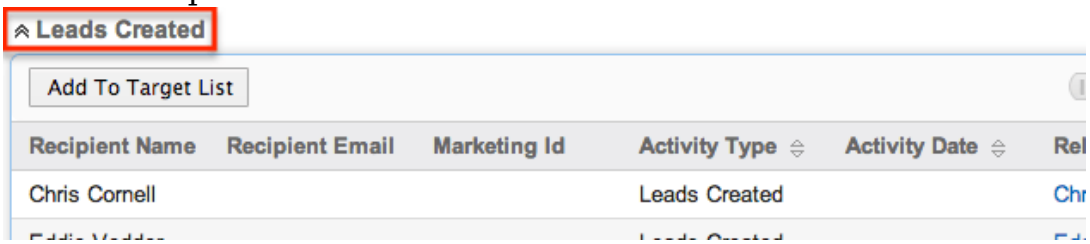

As well as a subpanel called Campaigns:



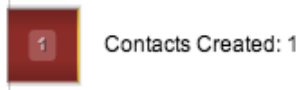

Leads created from the web-to-lead form can be tracked in the Campaigns status page via the Status Chart:

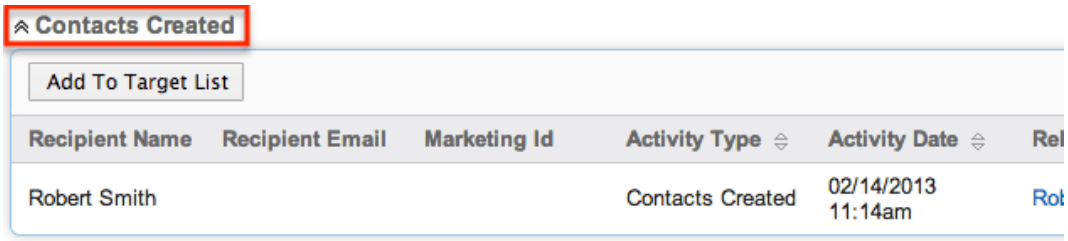



And the subpanel titled Leads Created:




If the lead that was captured in the web-to-lead form is converted to a contact, this will be shown in the Campaigns status page as well:






For more information regarding the Campaigns status page, please refer to the Viewing Campaign Status section in the Campaigns documentation in the Application guide.

Last Modified: 01/26/2017 03:08pm

# Cases

## Overview

Sugar's Cases module is used to track and manage product or service related problems reported to your organization by customers. Cases are typically related to an account record, and multiple cases may be associated to a single account. There are various ways you can create cases in Sugar such as via the Cases module, importing cases, or converted from email. Once the case is created, you can view and edit information pertaining to the case via the Case's record view. Each case record may then relate to other Sugar records such as calls, contacts, bugs, and many others. This documentation will cover how to use the Cases module as well as the various actions and options available from within the module.

## Case Fields

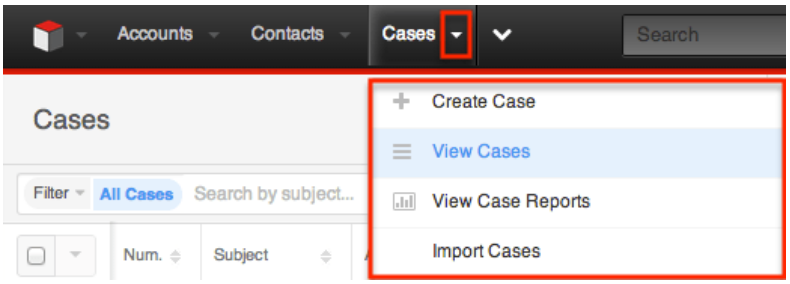
The Cases module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

| Field | Description |
|---|---|
| Account Name | The account that submitted the case |
| Assigned To | The Sugar user assigned to the case<br>Note: Case owners receive an email |

| | |
|---|---|
| | whenever a case is assigned to them if the administrator has enabled email notifications |
| Case Number | An automatically incremented number to identify every case, which cannot be edited through Sugar |
| Date Created | The date the case was created |
| Date Modified | The date the case was last modified |
| Description | Explanation of the cause and details of the case when submitted |
| Priority | Specify the urgency of the problem from this dropdown list |
| Resolution | Results of the investigation into the problem. |
| Show In Portal | Check this checkbox if the customer should be able to view this via the Portal if applicable |
| Status | Specifies the status of the case as the support representative moves the case along the process from submission to resolution |
| Subject | Brief statement of the problem |
| Teams | The Sugar team(s) assigned to the case |
| Type | Type of categorization that this case falls in to |
| Work Log | Free form field to add activities and notable events while working on the case |

## Cases Module Tab

The Cases module tab is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access the Case's list view. You may also click the triangle in the Cases tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of cases you last viewed in the module. The Favorites menu displays the list of cases you most recently marked as favorites in the module.




The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|---|---|
| Create Case | Opens the record view layout to create a new case |
| View Cases | Opens the list view layout to search and display cases |
| View Case Reports | Displays existing reports based on the Cases module |
| Import Cases | Opens the import wizard to create or update cases using external data |

If you do not see the Cases module tab in Sugar, please check the following:

- The Cases module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Cases module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Cases module for your entire Sugar instance. Reach out to your Sugar administrator to have the Cases module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

## Creating Cases

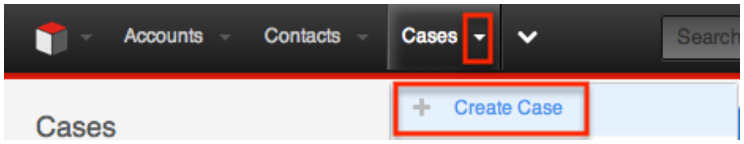
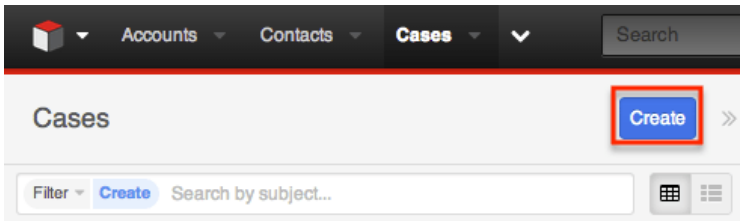
There are various methods for creating cases in Sugar including via the Cases module, quick create, duplication, and importing cases. Customers can also create cases via emailing a specific email account or through the Case Portal.

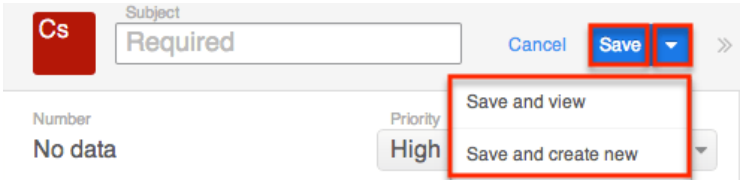
The full record view layout opens when creating the case directly from the Cases

menu and includes all of the relevant fields for your organization's cases. The quick create form is a shortened version of the Cases record view and typically contains fewer fields. When using quick create to make a case while viewing an existing record of another module, Sugar automatically creates a relationship between both records. For example, if you are viewing an account record (e.g. ABC Company) and create a new case via the quick create form, the Account Name field in the case record will automatically populate with "ABC Company", thus creating the relationship. Both the record view and quick create layouts can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

## Creating Via Cases Module

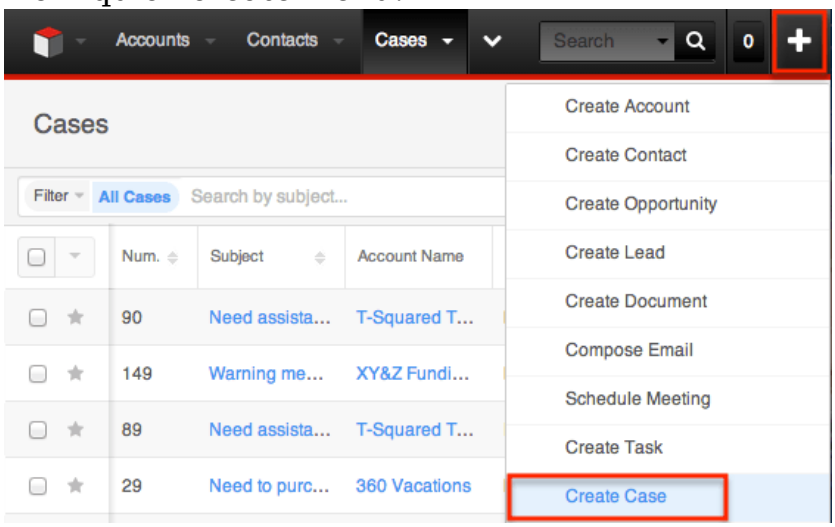
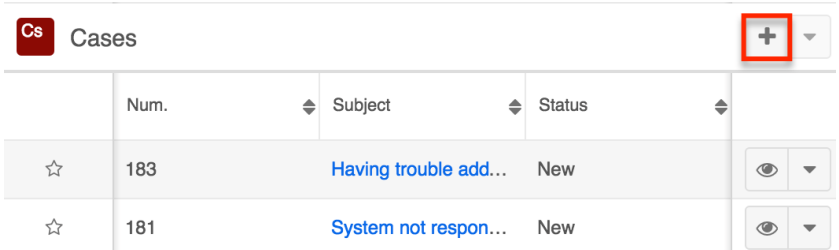
One of the most common methods of case creation is via the Create Case option in the Cases module tab. This opens up the record view layout which allows you to enter in all the relevant information for the case.
Use the following steps to create a case via the Cases module:

1. Click the triangle in the Cases module tab to open the actions menu and select "Create Case". You can also click the Create button on the upper right of the Cases list view.
   From Cases module tab:
   
   
   From Cases list view:
   
   
2. Enter appropriate values for the fields in the record view layout. All required fields are marked with a red asterisk and must be completed prior to saving. Note: Case Number is marked with a red asterisk as it is a required field, but no value is required to be added for the save to occur.
3. Once the necessary information is entered, click "Save".
   - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.

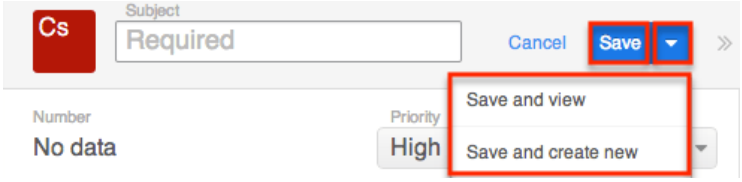



## Creating Via Quick Create

The quick create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also quick create a case from any Cases subpanel on related module records.
Use the following steps to create a case via Quick Create:

1. Open the quick create menu on the upper right of any Sugar page and select "Create Case" or select "Create" on any Cases subpanel on a related module's record view.
   Note: The quick create menu can be reconfigured by administrators via Admin > Configure Navigation Bar Quick Create. For more information on configuring layouts, please refer to the Configure Navigation Bar Quick Create documentation in the Administration guide.
   From quick create menu:
   
   
   From subpanel:
   
   
2. Enter appropriate values in the fields in the quick create form. All required

fields are marked with a red asterisk and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".
    - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.

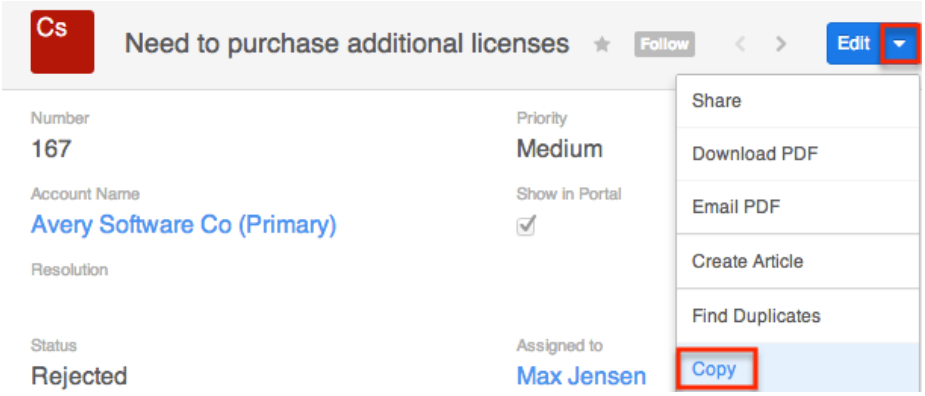



## Creating Via Duplication

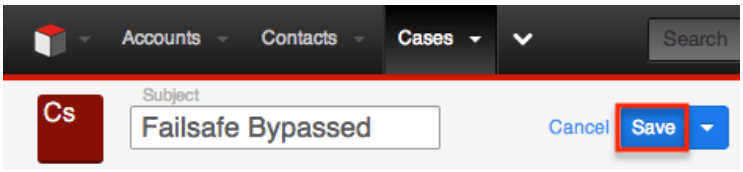
You can also create a new case by duplicating an existing case. The duplicate option is useful if the case you are creating has similar information to an existing case, such as reopening a previously closed case.

Use the following steps to create a case by duplicating an existing record:

1. Navigate to a case record's record view.
2. Click the Actions menu and select "Copy".



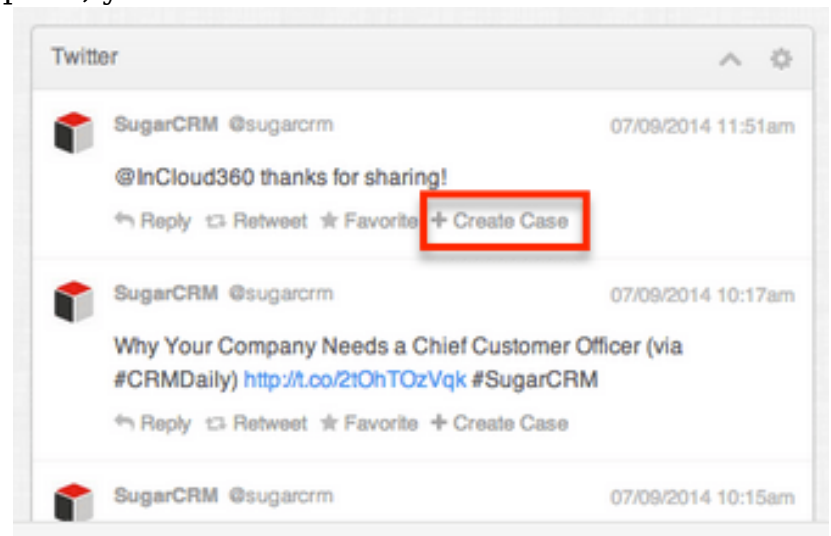

3. The displayed record view is pre-populated with the original case's values. Update the necessary fields, then click "Save".
   Note: Case Number is not duplicated and a unique number is generated upon saving the duplicate case.
    - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.




## Creating Via Twitter Dashlet

Users can create cases directly from the Twitter dashlet via the Home page or from within any sidecar module's intelligence pane using Sugar's Tweet to Case feature. Follow the instructions below to get started with Tweet to Case:

1. Before enabling or using Tweet-to-Case, an administrator must first configure the Twitter connector for your instance.
2. Once the Twitter connector is configured, an administrator must then enable the Tweet to Case feature. Please refer to the Tweet to Case section of the System documentation for instructions on how to enable this feature.
3. Now you can add the Twitter dashlet to your Home page or to any Sidecar module's intelligence pane. For more information, please refer to the Twitter Dashlet section of the Intelligence Pane documentation.
4. When the Tweet to Case feature is enabled and the Twitter dashlet is successfully added to your Home page or to a sidecar module's intelligence pane, you will see a "+ Create Case" link below each incoming tweet.



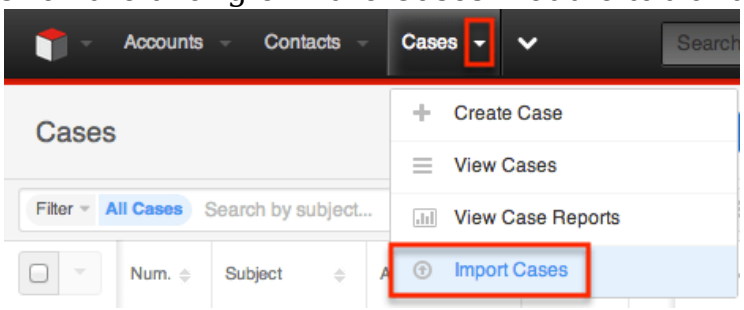

5. To create a case, simply click on this link and a new case drawer will open. Please note that the tweet ID will automatically be populated in the Subject field.

## Importing Cases

The import function allows you to push multiple case records into Sugar using a comma (or other character) delimited file instead of creating them one-by-one. For more information on importing, please refer to the Import documentation.

Use the following steps to import cases via the Import Cases option:

1. Click the triangle in the Cases module tab and select "Import Cases".




2. In Step 1, select the source of the data you are importing. Click "Next".
3. In Step 2, select the import file and choose "Create new records only". Click "Next".
4. In Step 3, confirm the import file properties. Click "Next".
5. In Step 4, confirm the field mappings for the import. Click "Next".
6. In Step 6, view the import results.
    - The Created Records tab will show all of the new case records.
    - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
    - The Errors tab will show records that were not imported due to errors detected during import.

## Creating Via Case Portal

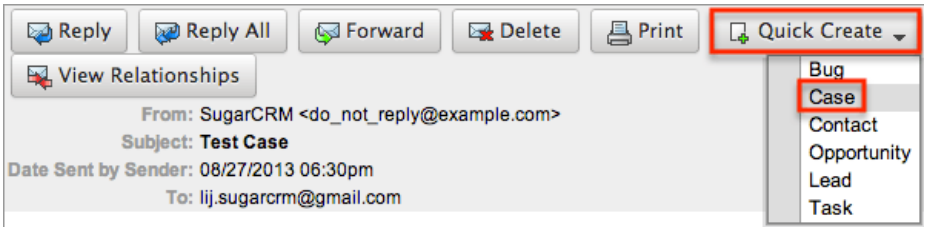
The Case Portal offers a way for customers to submit a case directly into Sugar instead of requiring a Sugar user to input the information and submit the case manually. Customers will have to be registered users of the portal to be able to submit cases. For more information on using the Case Portal, please refer to the Portal Deployment User Guide and Portal User Guide .

## Creating Cases From Email

Creating cases via email allows users added convenience in the case creation process, therefore expediting the amount of time before the support team can begin working on the issue. Cases can be created from emails sent to individual users through the emails module or can be automatically created when emails are sent to a group mailbox which is monitored by Sugar.

### Creating Via Emails Module

Users in Sugar can launch a quick create form to create a case from an external email or from an imported email. From the emails pane in the Emails module, click "Quick Create" and select "Case".




The quick create form opens in a popup window. The subject and description fields for the case are populated by default with the subject and body of the email. All required fields are marked with a red asterisk and must be completed prior to saving. Once the necessary information is entered, click "Save".
The email selected will then be imported, if not already, and will be related to the new case. A relationship will be made between the email and the case created via the flex relate field.

### Creating Via Inbound Email

The Inbound Email functionality allows a way for customers to submit a case directly into Sugar via email instead of a Sugar user having to imput the information and submit the case manually. Sugar has the ability to monitor specific email boxes to be able to automatically create these cases. For more information on Inbound Email, please refer to the Inbound Email documentation.

## Viewing Cases

There are various options available for viewing case records in Sugar including via Cases list view, Cases record view, Cases Last Viewed menu, dashlets, and reports. Please note that you will only be able to see case records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles management documentation in the Administration guide.

### Viewing Via List View

The Cases list view displays all case records meeting the current search criteria. Users can also access the activity stream to view posts specific to the case record. For more information the Record View's Activity Stream, please refer to the

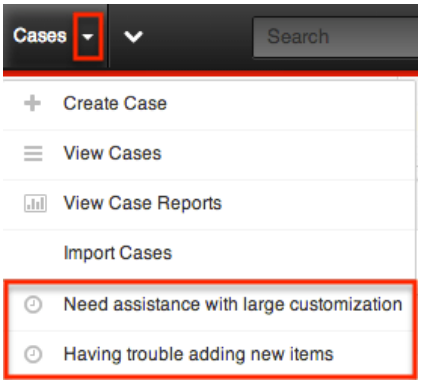
Activity Stream section of this documentation. The Intelligence pane can also be viewed to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's sales, cases, activities, etc. For more information regarding the Record View's Intelligence Pane, please refer to the Intelligence Pane section of this documentation. To access the list view, simply click the Cases module tab. While list view shows key case fields, you can click the case's subject to open the record in record view. For more information on viewing cases via list view, please refer to the Cases List View section of this documentation.

## Viewing Via Record View

The Cases record view displays thorough case information including all relevant case fields followed by subpanels of the case's related records belonging to various modules. Users can also access the activity stream to view posts specific to the case record. For more information the Record View's Activity Stream, please refer to the Activity Stream section of this documentation. The Intelligence pane can also be viewed to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's sales, cases, activities, etc. For more information regarding the Record View's Intelligence Pane, please refer to the Intelligence Pane section of this documentation. The record view can be reached by clicking an case record's link from anywhere in the application including from the Cases list view. For more information on viewing cases via the record view, please refer to the Cases Record View section of this documentation.

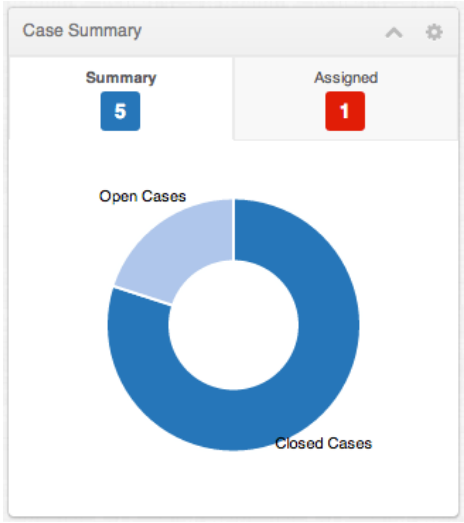
## Viewing Via Recently Viewed

As you work, Sugar will keep track of which cases you have recently viewed. Click the triangle in the Cases module tab to see a list of your most recently viewed cases and click each name to open the case in record view.



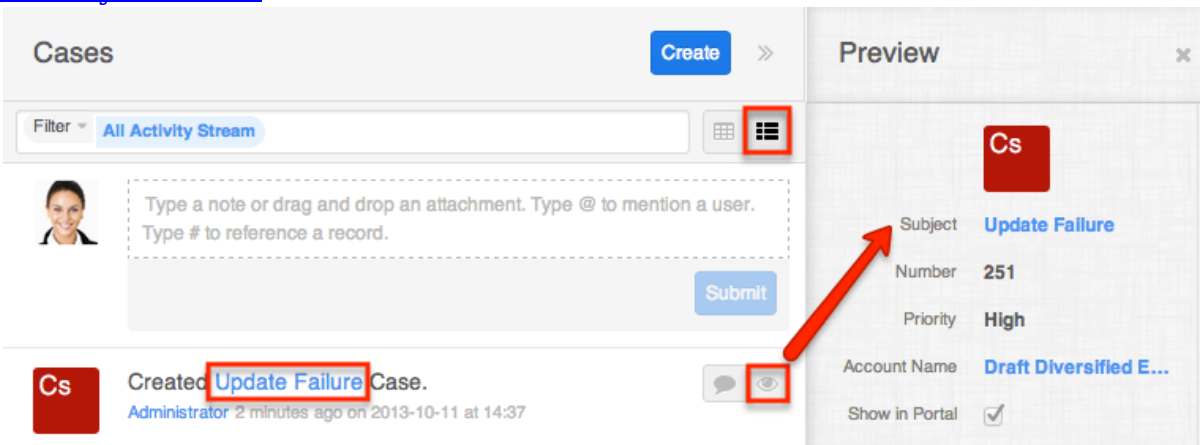

## Viewing Via Dashlets

Sugar Dashlets allow users to get a quick view of various records, activities, reports, etc. Dashlets may be added to a user's Home page or to the intelligence pane of any module. You can view case information in case-based dashlets such as "Case Summary". Clicking a case's subject from any dashlet will open the case in record view. For more information on using dashlets and viewing case records via dashlets, please refer to the Modules section of the Home documentation.



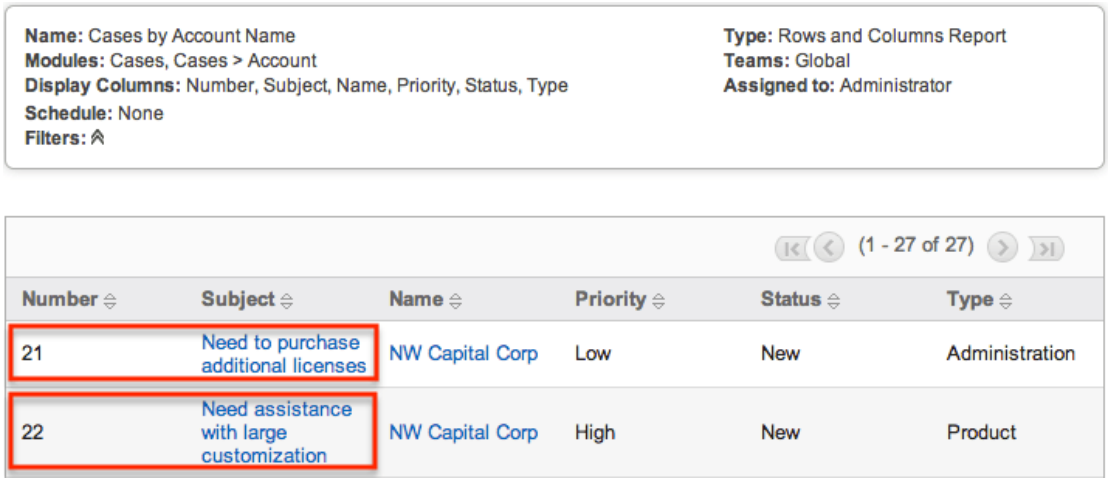

## Viewing Via Activity Streams

The activity stream allows users to view each other's activities in Sugar and the actions that took place for the various modules (e.g. Cases, etc.) via posts (record post, user post, etc). You can access the Bugs record view by clicking the case's name referenced in the post. You can also preview the bug record's detail directly from the activity stream by clicking the Preview button to the right of the post. For more information on viewing records via the activity stream, please refer to the Activity Streams Documentation.

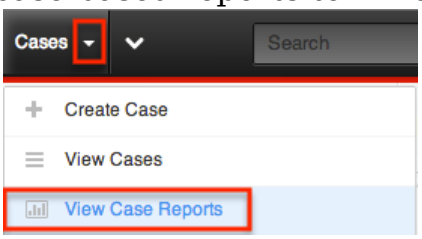



## Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding cases and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the case record's record view by clicking the case's subject in the report results. Please note that you can only directly access case record views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation.




In addition to navigating to the Reports module and finding or building relevant reports, you can use the Case module tab's View Case Reports option to see all case-based reports to which you have access.




Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

## Searching Cases

The Cases list view includes a Module Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Cases list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting

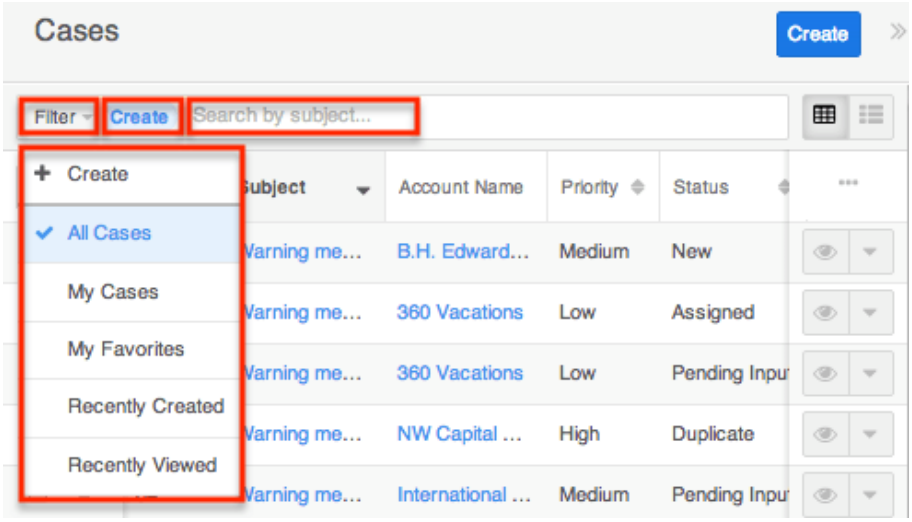
search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %system). This will pull up any record that has the word "system" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

## Module Search

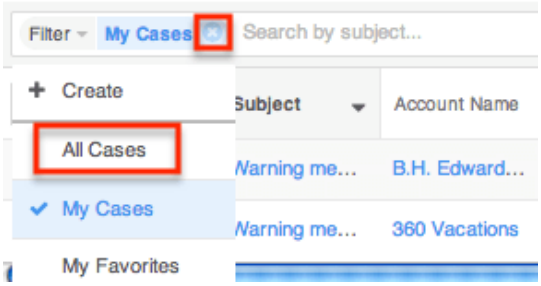
Module search enables users to easily search by case number within the Cases module and pull up matching records in the list view. The search also provides a Filter option which can be used in combination with the open Search box to narrow your search further using the available options as follows:

- Create : Create a new custom filter which you can use to filter your search
  - Note: You can also click "Create" to the right of the Filter option.
- All Cases : Returns all records in the module to which you have access
- My Cases : Returns only records assigned to you
- My Favorites : Returns only records you have marked as favorites
- Recently Created : Returns only records you created in the module within the last 7 days
- Recently Viewed : Returns only records you have viewed in the module within the last 7 days




When you choose a filter, Sugar will return cases which match both the selected filter and any name provided in the "Search by subject..." bar in the filtered list

view results. For example, if you select "My Cases" in the Filter options and enter a case name, Sugar will only return case records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search bar. To see all case records to which you have access, simply select the All Cases option in the filter and remove any text from the search bar. You can also click the Clear icon within the selected filter option (e.g. My Cases) in the Search bar to clear the filter and pull up all list view search results. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.




Please note that you will only be able to see case records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide. Administrators can configure what fields appear on the Cases Module Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

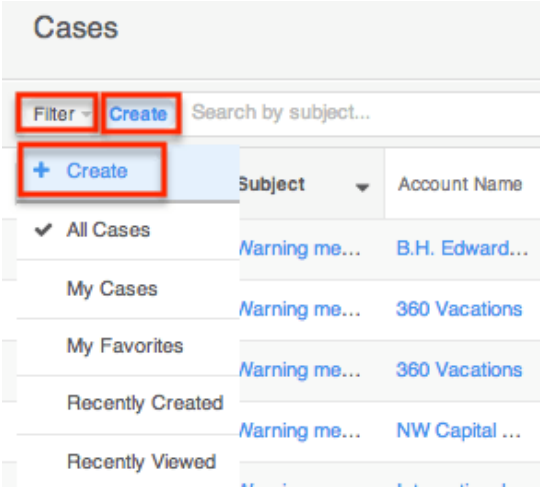
## Creating a Filter

Users can also create new filters via the Create option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the Cases list view. You have the option to add multiple fields to your new filter by clicking the Plus button to the right of the filter selection dropdown lists and set select operators along with their value(s). A filter's criteria need to be true for a record in order for it to appear in the list view search result. Additionally, filters with no specified values may be saved as a custom filter to act as a filter template when a user often searches using the same fields but with varying values. Please note that only fields you have view access for will appear in the Filter list when creating a search filter.

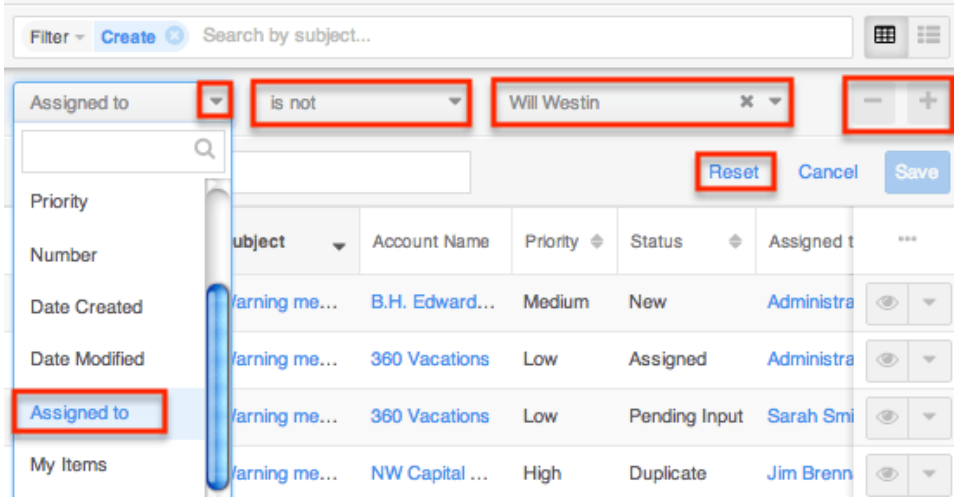
When you run a search using a created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.

The following steps cover creating a new Assigned to filter as an example:

1. Click the Filter option on the Cases search bar then select "Create".
    - You can also click "Create" to the right of the Filter option.




2. Select the field you wish to add to your filter as well as the condition and matching criteria.
    - Note: Only fields you have view access for will be available to add in the Filter list.
    - For Integer type fields (e.g. case number), you can select the "is any of" operator to pull up records that match any one of the set values (e.g. 100, 200, 300, etc.) in the search criteria.
3. To add multiple fields to the new filter, click the Plus button to the right of the filter.
    - To remove fields from the new filter, click the Minus button to the right of the filter.
    - To clear any filter values (e.g. Will Westin), simply click the "x" to the right of the value or select "Reset" to the left of the Save button.

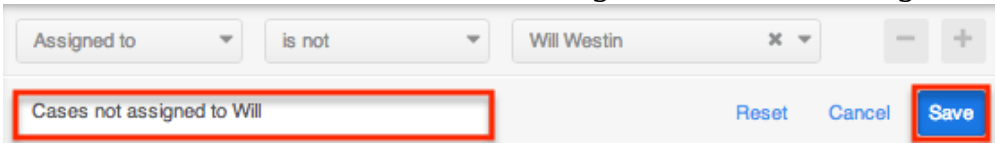



The list view will automatically display results matching your filters as you create and modify the criteria.

Saving a Filter

Saving a filter will preserve the chosen fields as well as the condition(s) of the matching value(s). Additionally, it will allow users to easily select previously created and saved filters from the Filter options.

The following steps cover saving a new search by Name filter as an example:

1. Create a new filter to perform a search on your desired fields.
2. Enter in a name for the new filter (e.g. "Cases note assigned to Will").


3. Click "Save" to add this filter to the module's Filter dropdown list.

## Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search may be used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.




To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the Search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation

in the Administration guide.

## Cases List View

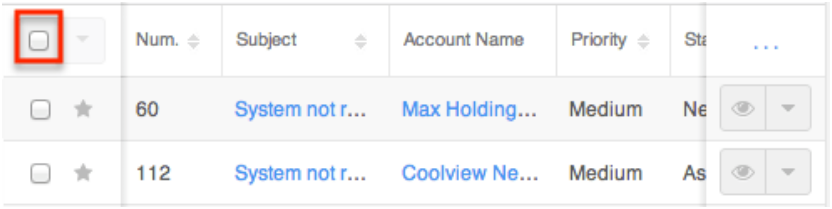
The Cases list view displays all case records meeting the current search criteria and to which your user has access. You can view the basic details of each case within the field columns. Please note that you will only be able to see case records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide.

Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

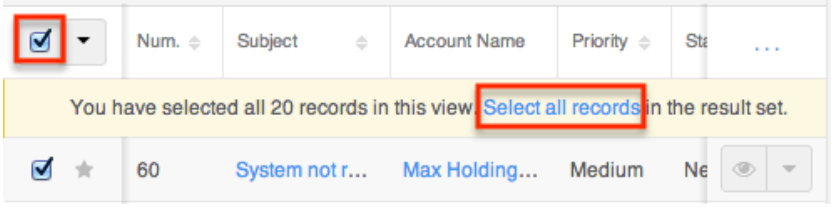
### Checkbox Selection

You can perform several actions on case records directly from the list view by first selecting the desired records. To select individual case records on the Cases list view, mark the checkbox on the left of each row. To select or deselect multiple case records on the list view, use the options in the checkbox dropdown menu:

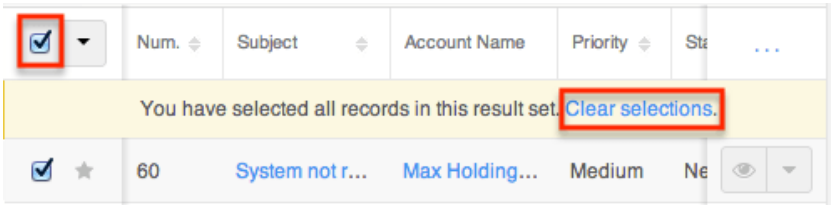
- Select This Page : Selects all records shown on the current page of case results.




- Select all records : Selects all records in the current search results across all pages of case results.

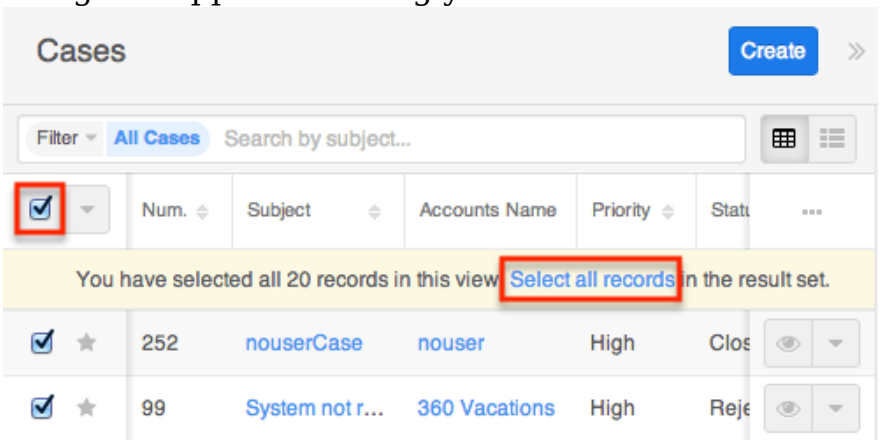



- Clear selections : Deselects all records that are currently selected.

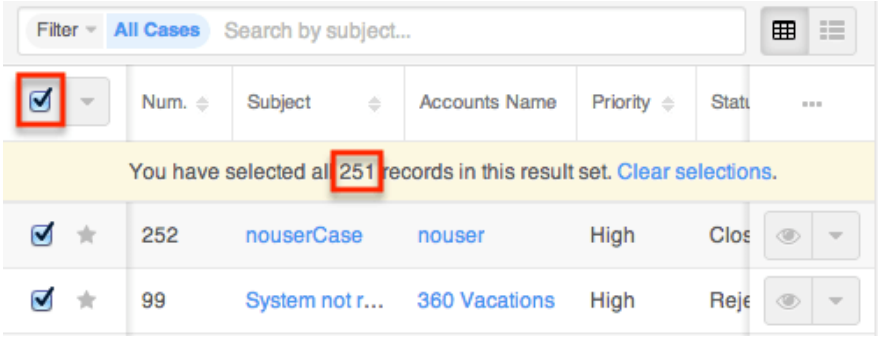



## Total Record Count

You can view the total record count on the Cases list view by selecting all records displayed on the current set of list view results. Once the records are selected, a dialog will appear allowing you to select all records in the results set.

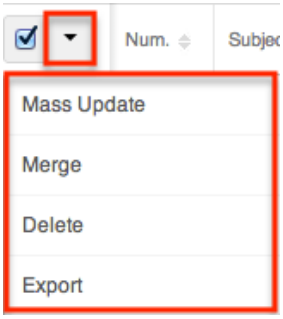



The total count of all records on the list view result set will appear in the dialog.




## Mass Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.

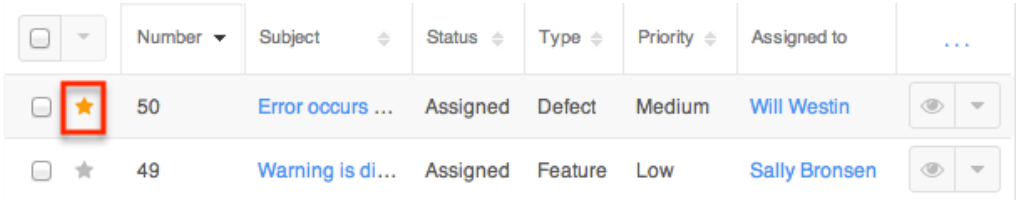



The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Mass Update | Mass update one or more cases at a time |
| Delete | Delete one or more cases at a time |
| Merge | Merge two or more duplicate cases |
| Export | Export one or more cases to a CSV file |
| Recalculate Values | (Available in certain circumstances) Updates calculated values to reflect changes to calculated fields made in Studio |

## Favorite Designation

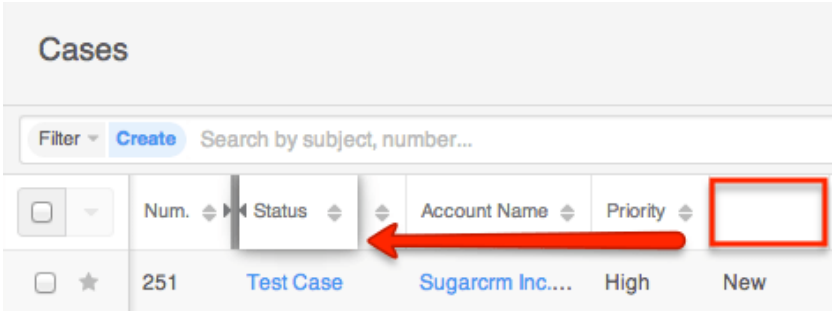
Users have the option to mark case records as favorites via the list view as well as the record view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Cases module tab. In the Cases list view, the star on the left of each case's row is yellow once marked to indicate a favorite case. For more information on how to mark records as favorites, please refer to the Favoriting Cases section of this documentation.




## Column Reordering

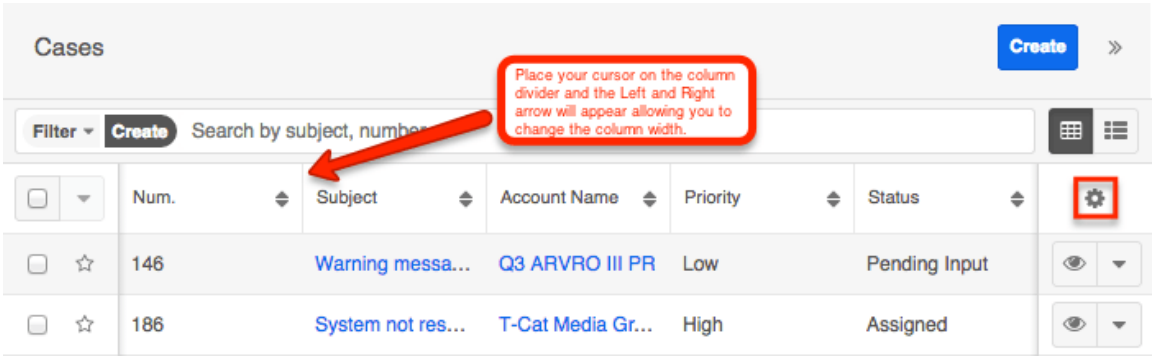
List view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a

user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the default column order.




## Column Resizing

Users can easily adjust the size of columns in the Cases list view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the current list view is different from the default column width. Changes to the column width made by administrators in Studio are only respected if the user has not resized the specific column in the list view. The column size set by the user will supersede the default column width configured in Studio until the user resets the list view back to the default widths.

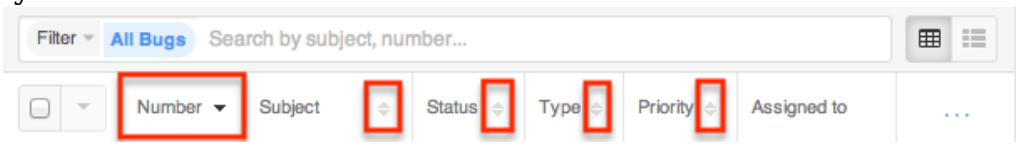



## Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting

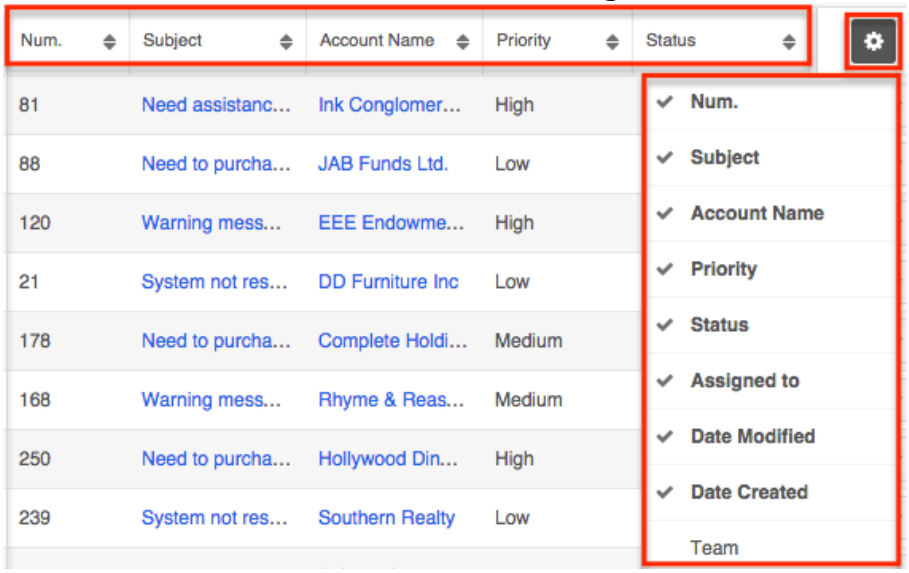
will have a pair of arrows.

Note: List views may only be sorted by one column at a time and cannot be sorted by custom relate fields.



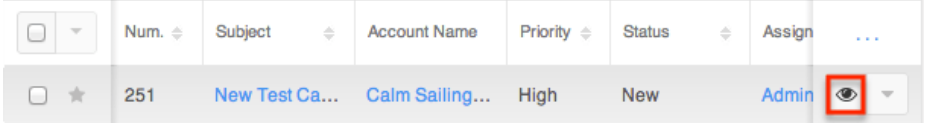

## Column Selection

Sugar gives users the ability to personalize the list view by specifying which fields they want to be displayed in the list view. You can click the Column Selection icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column on your list view. Please note that administrators have the ability to configure what fields are available to display in the list view via Admin > Studio. For more information on configuring fields to display in the list view, please refer to the Studio documentation in the Administration guide.



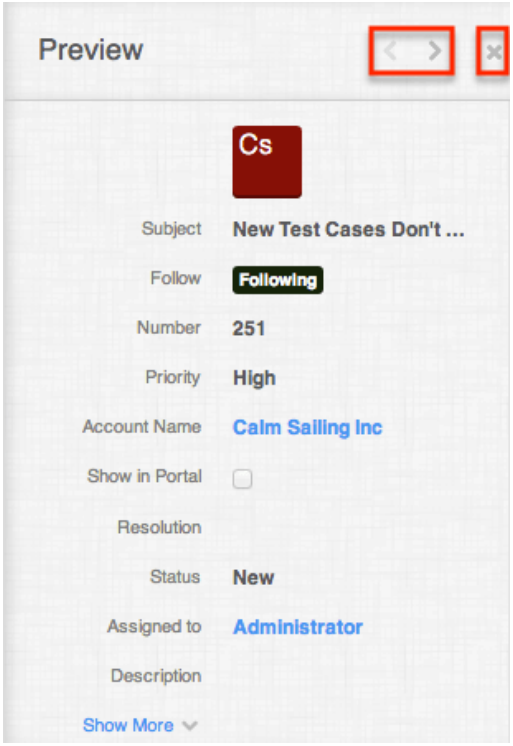

## Preview

Users can view a record's details directly from the Cases list view by clicking the Preview icon to the far right of each case's row.



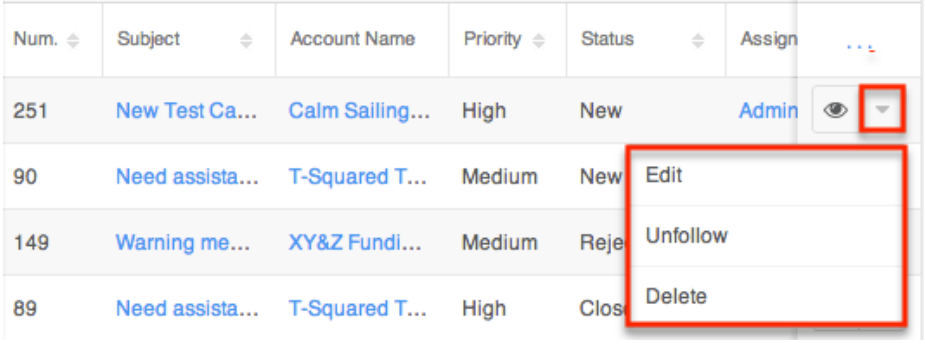

The record's data will display to the right of the list view providing key information

regarding the record as well as the related activity stream information. On the upper right of the preview pane, there is a Left and Right arrow button that allows you to scroll through the list view's current search results by previewing the next or previous record. To close the preview, simply click the "X" on the upper right of the preview pane.




## Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to edit, follow, or delete specific records directly from the list view.



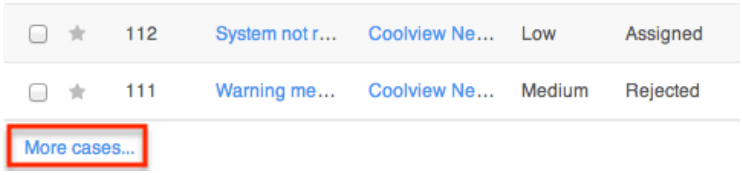

The options in the Record Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this case |
| | |

| | |
|---|---|
| Follow | Follow / Unfollow this case |
| Delete | Delete this case |

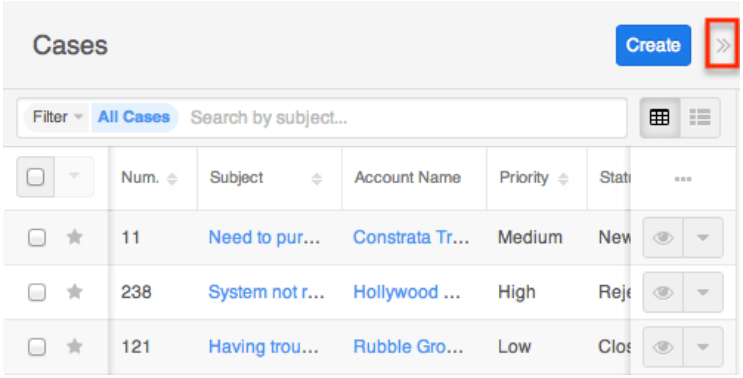
## More Cases

Additional details for each case can be viewed by clicking the "i" icon to the far right of each list view row. This provides users a quick view of additional case information in addition to what appears in the display column fields. The resulting pop-up window will show the Description and Resolution fields by default. The list of fields appearing here may only be configured through a code-level customization.




## Right Hand Side Drawer

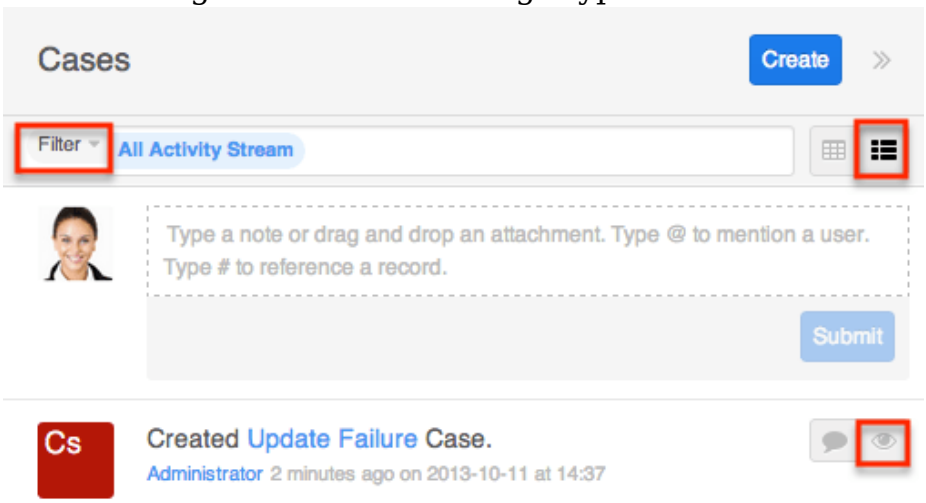
On the upper right of the Cases list view there is a Double arrow icon which allows users to expand the list view to the full screen width. The intelligence pane to the right of the list view will be hidden when the list view is expanded. To reduce the list view's width and reveal the intelligence pane, simply click the Double arrow icon again.




## Activity Stream

The Case module's activity stream displays user posts made on the Cases module and record posts relevant to an account record. To view the module's activity stream, simply click the Activity Stream button to the right of the list view's search bar. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts using the comment button to the far right of each post. You can also preview the record

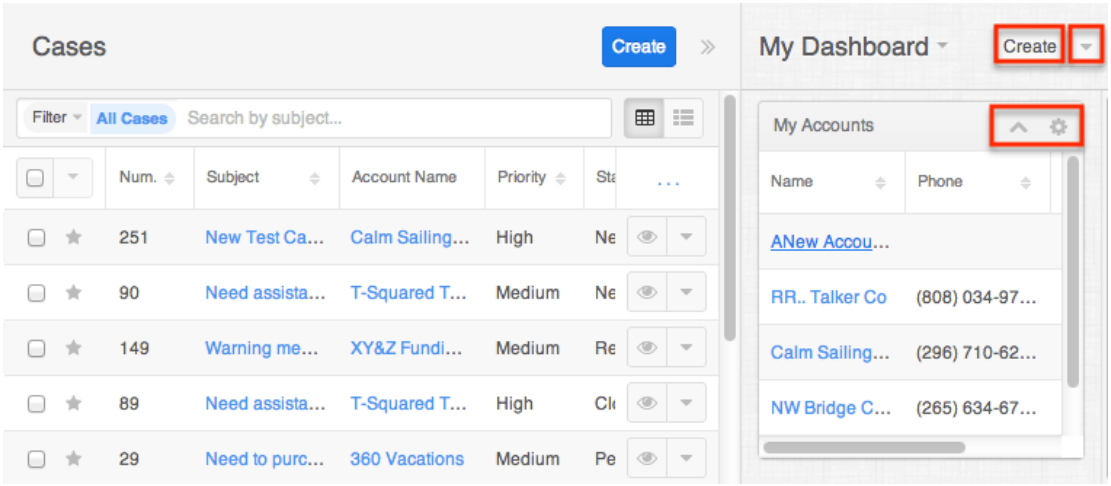
referenced in record posts by clicking the Preview button to the right of each post. The activity stream can be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box and selecting the desired message type.




## Intelligence Pane

An intelligence pane displays to the right of the Cases list view and provides users with valuable record information via various dashlets. The Help dashboard normally displays by default along with the List View Help dashlet and Learning Resources dashlet. The List View Help dashlet provides users with a brief introduction to the module along with a link (e.g. Cases documentation) to the corresponding documentation in the Application guide. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may create other dashboards for use with the Cases module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets (e.g. My Cases, etc.) to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do no wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Cases module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.



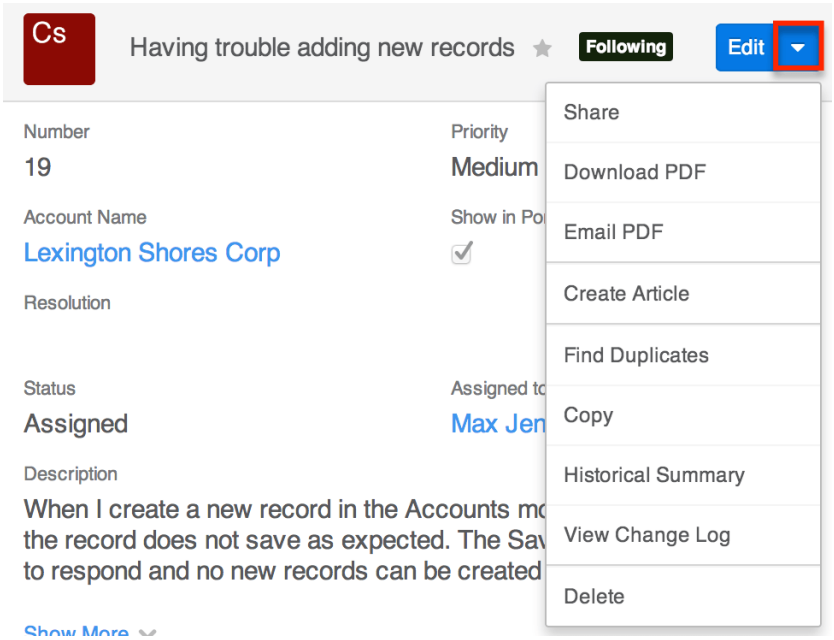

# Cases Record View

The Cases record view displays thorough case information including all case fields which are grouped by default into the Overview and Other panels. You can also view a case's related records (Activities, Contacts, Bugs, etc.) which appear in subpanels beneath the case fields. The record view can be reached by clicking a case record's link from anywhere in the application including from the Cases list view.

Please note that you will only be able to view a case record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Teams and Roles management documentation in the Administration guide. Users with administrator or developer access have the ability to change the record view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Actions Menu

The Actions menu on the top right of each case's record view allows you to perform various actions on the current record.

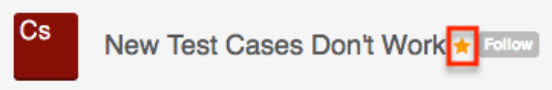



The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this case |
| Share | Share a link to this case via email |
| Download PDF | Download case information as a PDF file |
| Email PDF | Email case information as a PDF attachment |
| Create Article | Converts information from the case to the record view of a Knowledge Base article. Please refer to the Knowledge Base documentation in the Application Guide |
| Find Duplicates | Locate potential duplicates of this case |
| Copy | Duplicate this case |
| Historical Summary | View a historical summary of activities (e.g. calls, meetings, etc.) related to this case |
| View Change Log | View a record of changes to this case |
| Delete | Delete this case |

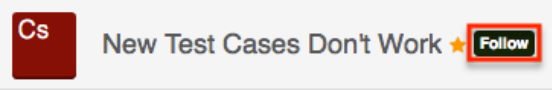
## Favorite Designation

Users have the option to mark case records as a favorite via the record view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Cases module tab. In the Cases record view, the star on the right of the case's subject is yellow once marked to indicate a favorite case. For more information on how to mark records as favorites, please refer to the Favoriting Cases section of this documentation.



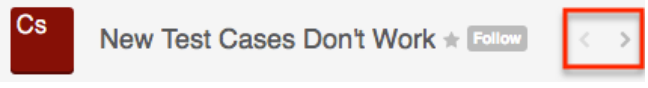

## Following Designation

Users also have the option to follow case records via the record view or list view. This allows users to view record posts from followed cases on their Home page and Cases list view activity streams. Each user can personalize their activity stream by viewing posts for records that are most important to them. From the record view, users may follow or unfollow cases to which they have access using the Follow button to the right of the case's name. For more information on how to mark records to follow via the list view, please refer to the Record Actions Menu section of this documentation. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. If you wish to stop following a specific case record, click the Following button to revert it to gray. Should a user lose access to a record in Sugar, they will automatically stop following that record.




## Next or Previous Record

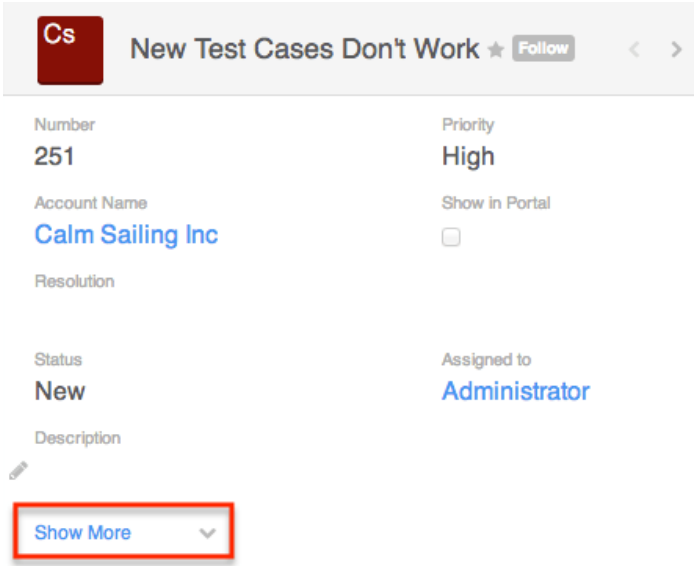
On the upper right of the Cases record view, there are two buttons that allow you to page through each case in the Cases list view's current search results. Clicking the Previous button displays the previous case of the current search results while clicking the Next button displays the next case of the current search results. The text in between shows which case result you are currently viewing within the total number of current results.




## Show More

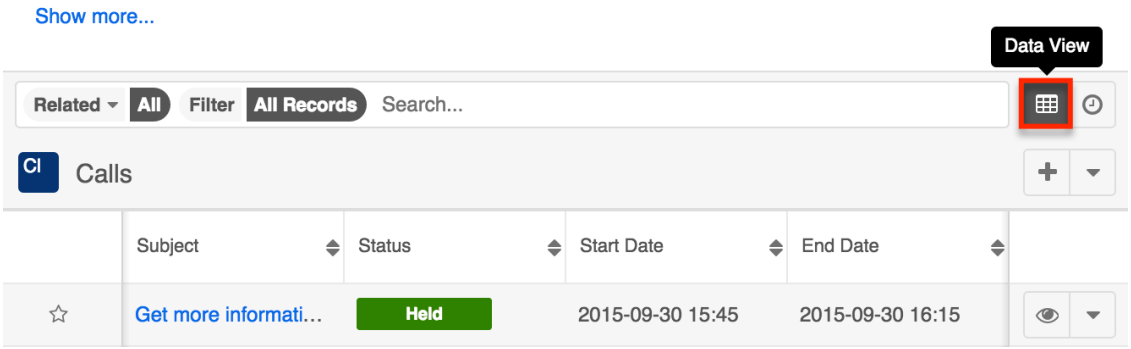
The Case's record view typically display a few key fields (e.g. number, priority,

type, category, etc.) on the business card panel with the option to view more fields by clicking the Show More link on the bottom left. Please note that administrators can configure what fields appear on the business card panel via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.




## Subpanels

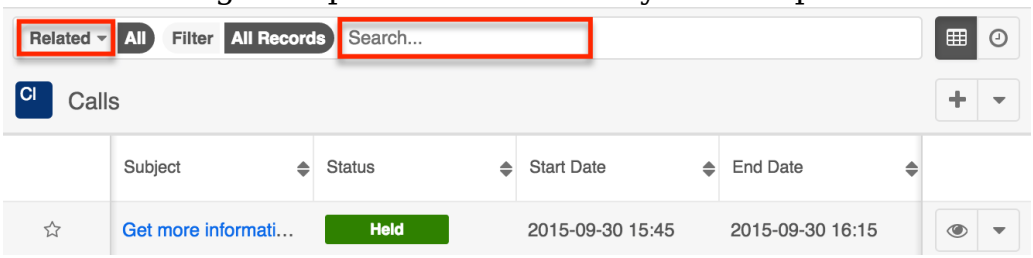
Beneath a case record's fields are subpanels containing related records from various modules, communication history regarding the case, and what contacts to work with regarding the case. Selecting the Data View button will display the subpanels rather than the record's activity stream.



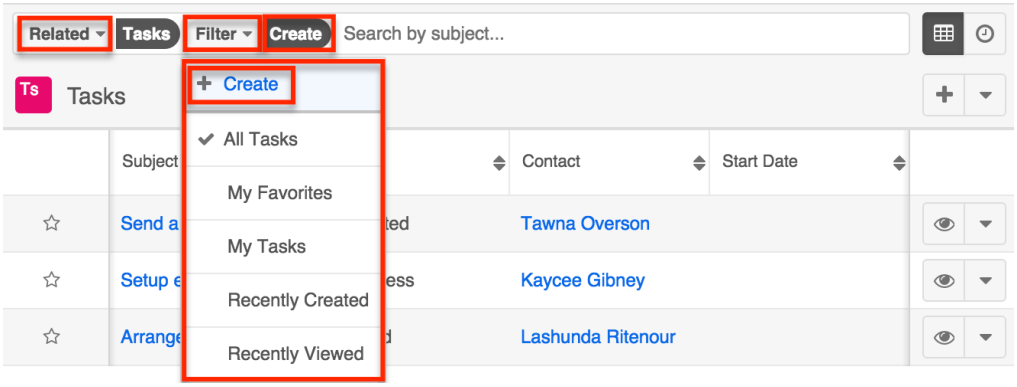

### Filter Options

While in Data View, all of the case record's related records will be displayed beneath the case record's fields. Users have the ability to search for records which appear in the subpanels as well as filter the view to only display a specific module (e.g. Contacts, Tasks, etc.). To locate a record by name, enter the keyword into the Search bar, and the subpanel(s) with the matching record(s) will appear below. To

filter, simply click the Related option to the far left of the Search bar and select the module whose subpanel you wish to view. Filter and search may be combined to only display matching records within a selected module. To see all subpanels to which you have access, simply select "All" in the Related options and remove any text from the search bar. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the page. Returning to the page will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.

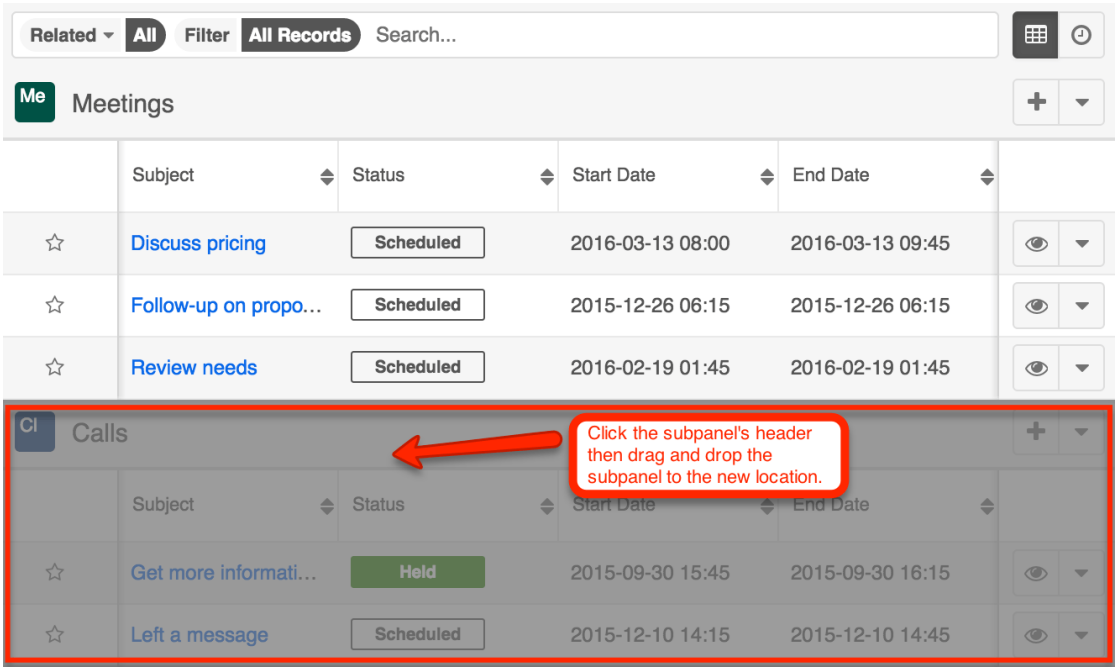



When a Sidecar module (e.g. Contacts, Tasks, etc.) is selected from the Related options, you have the option to filter the related subpanels further using one of the available options (e.g. My Favorites, Recently Created, etc.). Please note that you can also create custom filters for related Sidecar modules. Once the related module (e.g. Contacts) is selected, either click the Filter option and select "Create" or click "Create" to the right of the Filter option. For more information on creating a related records filter, please refer to the Creating a Related Records Filter section of the Search documentation.




## Reordering Subpanels

Users can easily move subpanels to a new location on the record view by dragging and dropping the subpanel's header. The new subpanel order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared.




Related Record Subpanels

The most common type of subpanels displayed on a case's record view contain the case's related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. For example, a case may be related to multiple notes, which means that the related notes will be displayed in the subpanel beneath the fields.

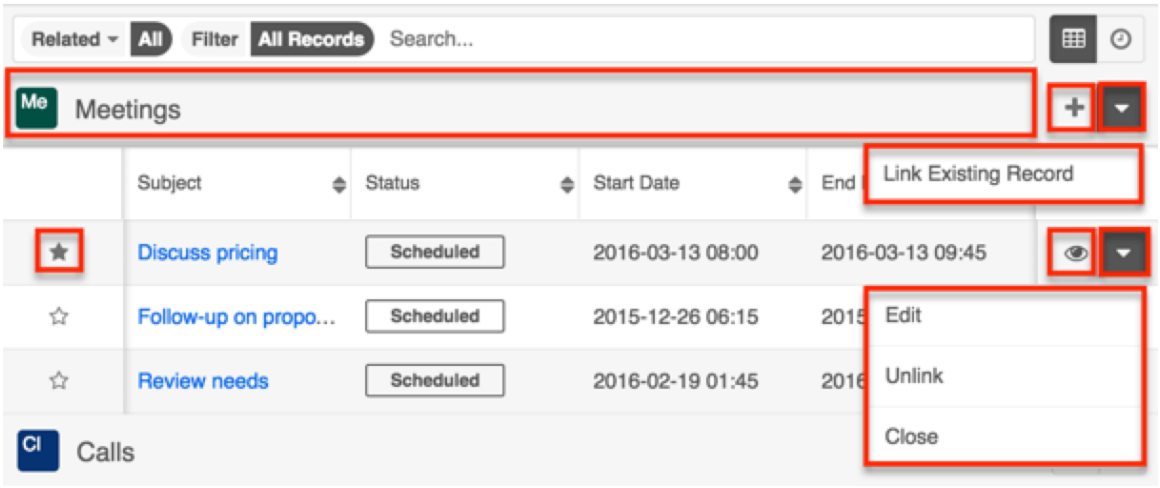
Users with administrator or developer access have the ability to change the fields (e.g. Subject, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.

Related record subpanels allow the following operations to be performed:

- To view the details of a related record, click the record's name in the subpanel to open it in record view.
- To relate an existing record to the case, choose "Link Existing Record" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the case, click the Plus button to the left of the Actions menu, then complete the record view layout and click "Save".
- To preview the related record, click the Preview icon to the far right of the record's row in the subpanel.
- To inline edit the record directly from the subpanel, choose "Edit" from the Actions menu on the far right of the record's row and click "Save" to preserve

the change.

- To delete the case's relationship to a record, choose "Unlink" from the Actions menu on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To mark the record as a favorite, click the star icon to the left of the desired record's row.
- To collapse or expand the subpanel, click anywhere on the subpanel's header.
- To change the column size in the subpanel, place your cursor on the column divider and when the Left and Right arrow appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.



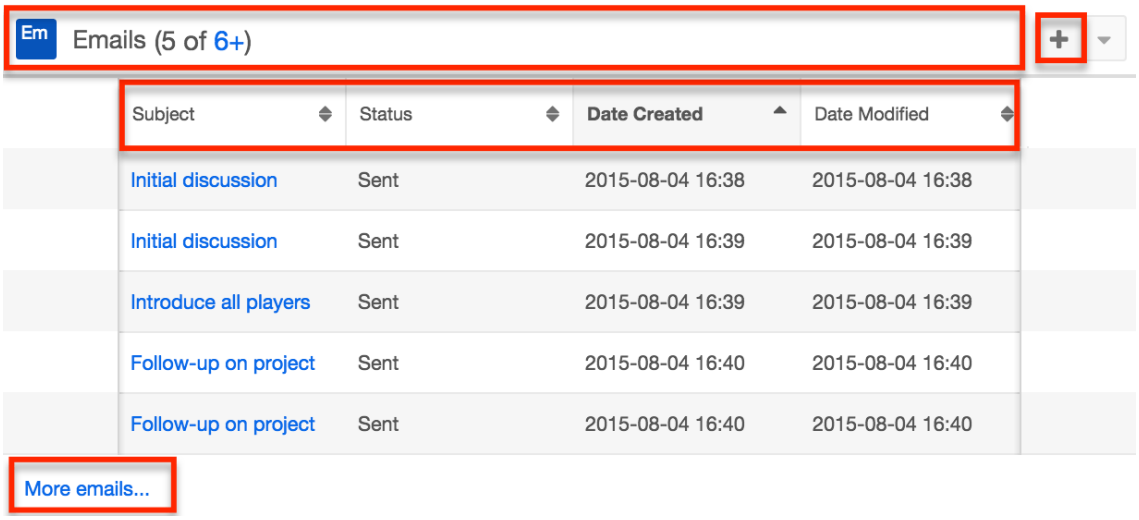

Emails Subpanel

The Emails subpanel in the Cases module displays both emails implicitly and explicitly related to the case record in addition to emails from its related contact records. Please note that any incoming emails must contain the case number (e.g. [CASE:100]) in the subject line in order for the email to appear in the Emails subpanel. Emails in Sugar are implicitly related to records in Sugar that match an email address in the From, To, or Cc fields in the email. This implicit relationship is made for emails sent from Sugar as well as any email imported into Sugar via Inbound email accounts or email archiving. While composing an email or relating an existing email to a record, users have the ability to set an explicit relationship via the flex relate field by Relating Emails. This allows the email to be explicitly related to a single record from one of many modules.

Note: Administrators can enable or disable emails from related contacts from appearing in the Emails subpanel and History dashlet via Admin > Related Contacts Emails. For more information regarding enabling and disabling related contacts emails, please refer to the Related Contacts Emails section of the Emails documentation in the Administration guide.

The Emails subpanel allows the following functions to be performed:

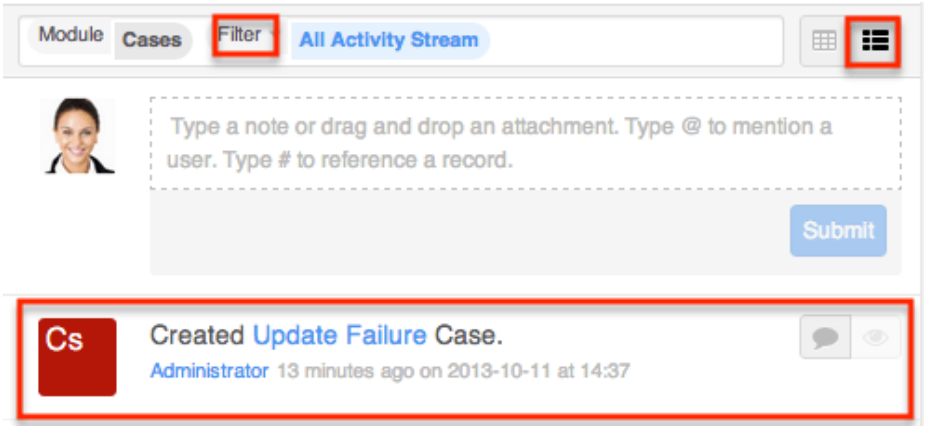
- To view the details of an email, click the subject in the subpanel to open it in detail view.
- To collapse or expand the subpanel, click anywhere on the subpanel's header.
- Click "+" to create a new email that will have an implicit relationship with this record.
- Sort the emails by Subject, Status, Date Created, Date Modified, or Assigned User.
- Click "More emails" to see any additional emails hidden by the default view.
- To change the column size in the subpanel, place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. For more information on resizing columns, please refer to the Column Resizing section of this documentation.
    - Note: The subpanel column width will not be preserved when you navigate away from the page.




## Activity Stream

Record view's activity stream displays user posts and record posts specific to the individual case record. To view the record's activity stream, simply click the Activity Stream button below the case's fields. Users can view all posts in the record view's activity stream even if they do not follow the record in Sugar. Please note that you must follow the record if you wish to view the record view posts via the Home page or List View activity stream. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts by clicking the Comment button to the far right of each post, entering in your comment, then clicking "Reply". You can also preview the record referenced in the record post by clicking the Preview button. The activity stream can also be filtered to only display certain messages (e.g. Messages

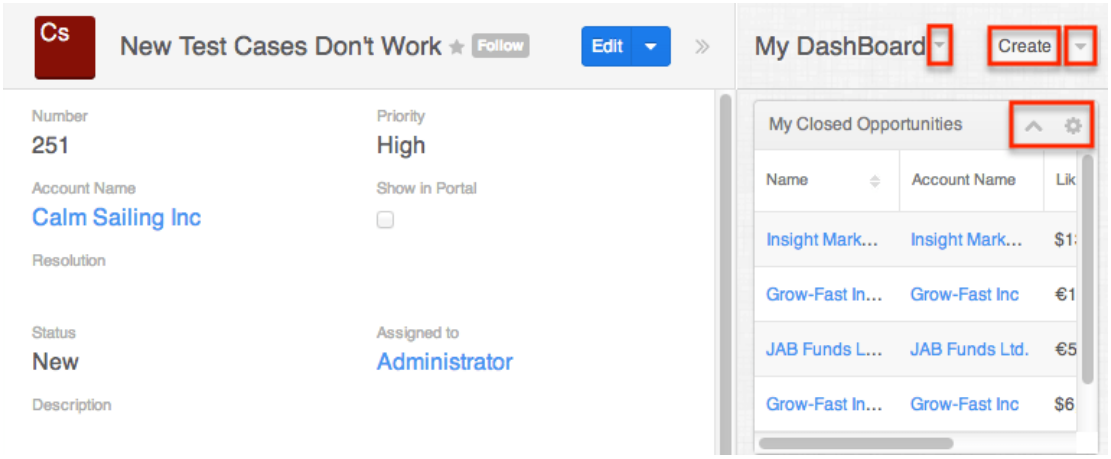
for Create, Messages for Update, etc.) by clicking "Filter" above the post input box then selecting the desired message type.




## Intelligence Pane

An intelligence pane displays to the right of the case's record view and provides users with valuable information specific to the case. The Help Dashboard normally displays by default along with the Record View Help dashlet and Learning Resources dashlet. The Record View Help dashlet provides users with a brief introduction to the module along with some instructions to help users utilize and navigate around the record view. A link to the corresponding documentation (e.g. Cases documentation) in the Application guide is also provided within the Help dashlet. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard, which will display some stock dashlets (e.g. Planned Activities dashlet, History dashlet , etc.) by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may choose to view any of their dashboards using the triangle to the right of the current dashboard's name and may create other dashboards for use with the Cases module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do not wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Cases module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.




# Editing Cases

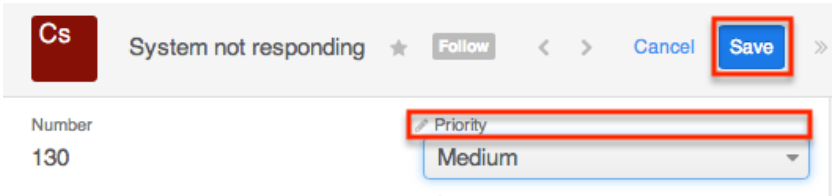
Cases may be edited at any time to update or add information to the record. You can make changes to existing case records via the Cases record view and quick create forms. Record view is available within the Cases module and includes all of the Case fields you should need.

Please note that your ability to edit cases in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure both the Cases record view and quick create via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

## Editing Inline Via Record View

Users can edit individual fields on a Case's record view without entering the full edit mode by clicking the field name. Fields which are available for inline editing will display a pencil icon when hovering on the field name or value. This will allow users to type or select a new value. Click "Save" to preserve the changes made to the field.

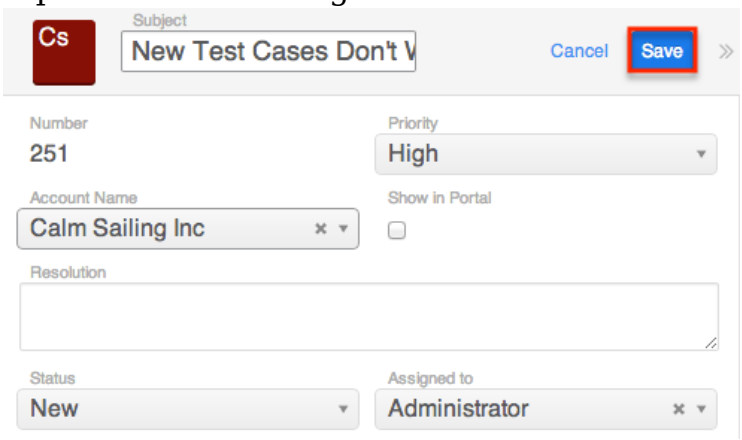



## Editing Via Record View

You can edit cases via the Record View by clicking the Edit button to the right of the case subject line.

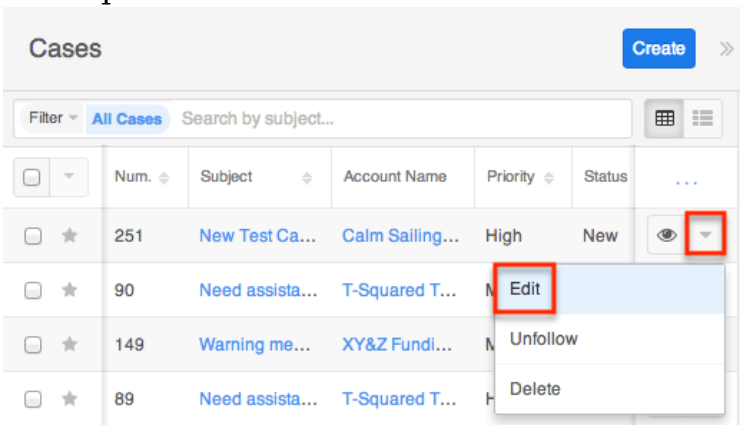



Once the record view layout is open, update the necessary fields, then click "Save" to preserve the changes made.

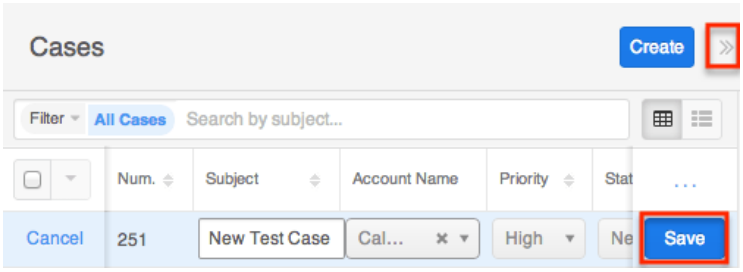



## Editing Inline Via List View

You can edit cases via the list view by clicking the triangle icon to the right of each case's preview and choose "Edit".



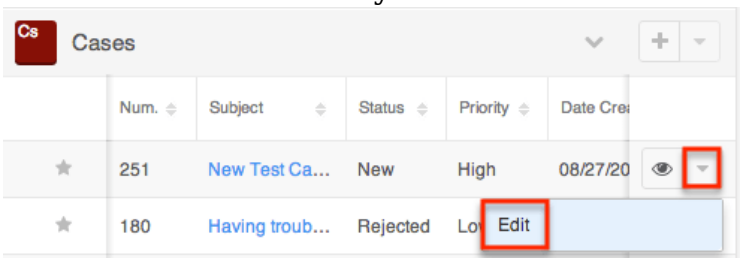

The case will become editable, inline as a shortened version of the record view layout. Click the double arrows to the right of the "Create" button to expand the editing window. Update the necessary fields, then click "Save" to preserve the changes.



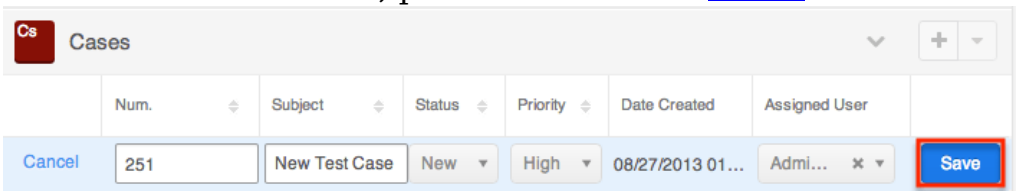

Note: Text area fields are not inline editable from list views.

## Editing Via Dashlets

You can edit cases by clicking the triangle icon to the right of each case's subject and choose "Edit" in any cases-based dashlet that appears in a module.




Update the necessary fields, then click "Save" to preserve the changes. For more information on dashlets, please refer to the Home documentation.




# Deleting Cases

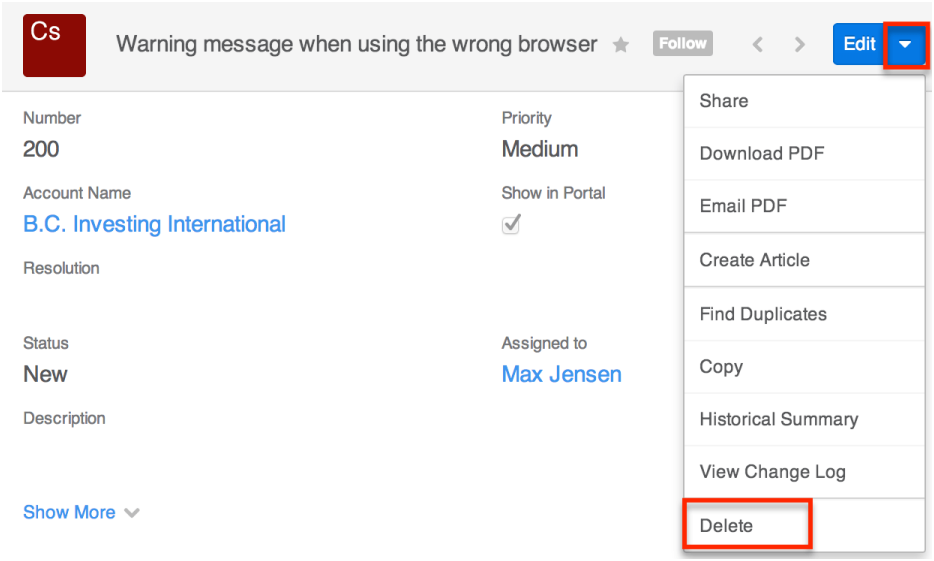
If a case record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Cases record view or list view. Deleting via the record view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting case records will not delete the related records and will only remove the relationship.

Please note that your ability to delete cases in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

## Deleting Via Record View

Use the following steps to delete a case record via the record view:

1. Navigate to a case record's record view.
2. Select "Delete" from the Actions menu.

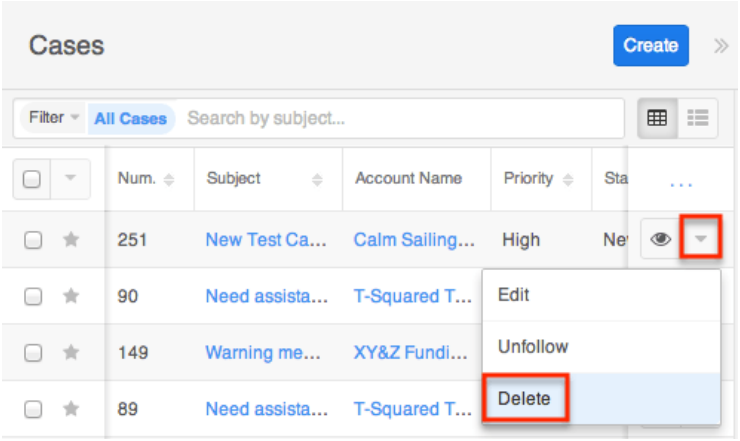



3. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

## Deleting Via List View

Use the following steps to delete a specific cases via the list view:

1. Navigate to the Cases list view by clicking the Cases module tab.
2. Use the Module Search to find the Case records you wish to delete.
3. Click the triangle to the right of the preview button of the case you want to delete.

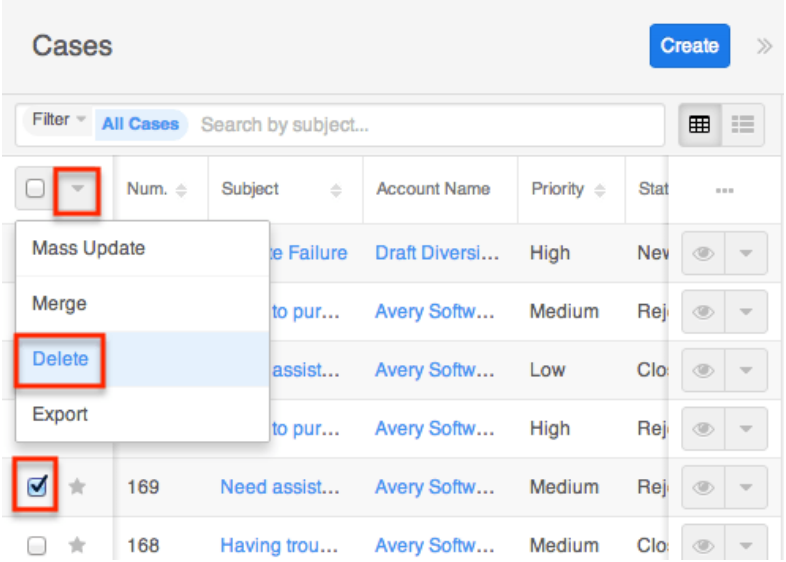


4. Choose "Delete" from the Actions menu.

### Mass Deleting Via List View

Use the following steps to delete one or more cases via the list view:

1. Navigate to the Cases list view by clicking the Cases module tab.
2. Use the Module Search to find the cases you wish to delete.
3. Select the desired case records individually or using the checkbox dropdown's options then choose "Delete" from the Actions menu.




4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

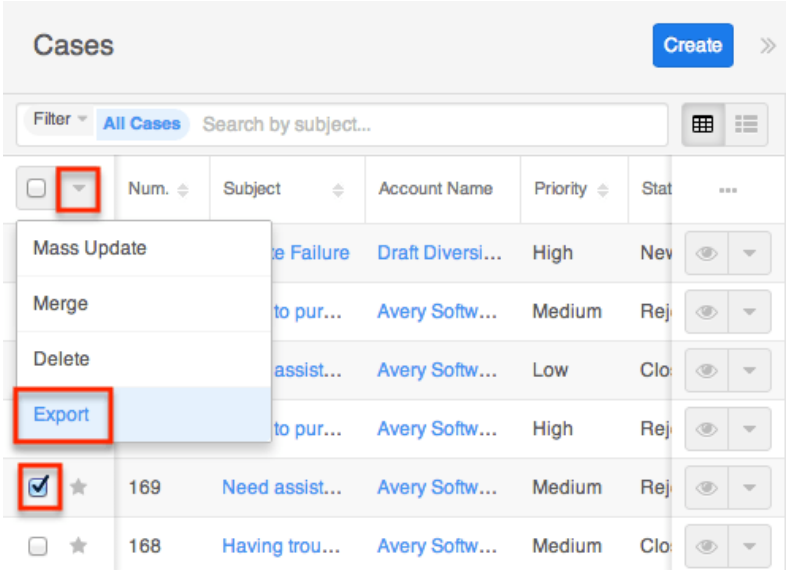
You can also use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to delete more than 1000 records or delete a specific group of records on the list view, please use the in module search to perform the deletions in smaller batches.

## Exporting Cases

Sugar's Export option allows users to download all fields for the selected cases to their computers as a CSV (comma-separated values) file. This may be useful when needing to use Case data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered cases back into Sugar. For more information on updating existing records via import, please refer to the Import documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of case records. If you encounter an error when performing this

action, we recommend selecting the records in smaller batches.

Cases may be exported from the Cases list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for cases and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.




Please note that your ability to export cases from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

## Mass Updating Cases

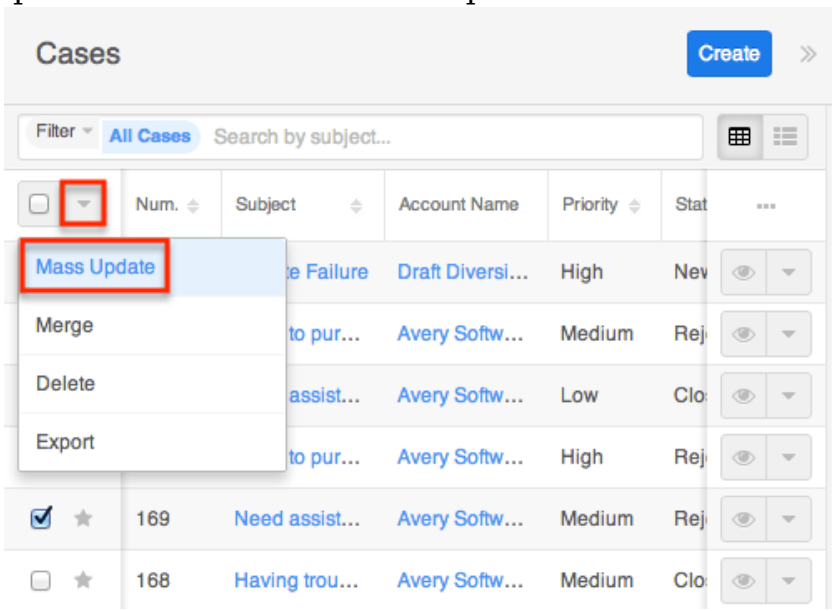
Mass Updating allows users to make the same change to multiple case records at once from the Cases list view. Users with administrator or developer level access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide. You can use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to update more than 1000 records or update a specific group of records on the list view, please use the filter option in module search to perform the updates in smaller batches.

Please note that your ability to mass update cases may be restricted by a role. For more information on roles, please refer to the Role Management documentation in

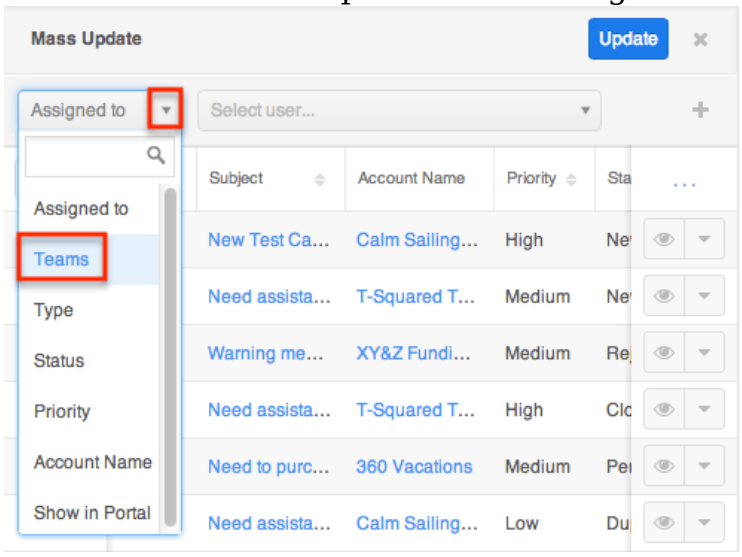
the Administration guide. Check with your system administrator if you do not see the Mass Update option.

Use the following steps to mass update case records from the list view:

1. Navigate to the Cases list view by clicking the Cases module tab.
2. Use the Module Search to identify cases you wish to modify.
3. Select the desired cases individually or using the checkbox dropdown's options then choose "Mass Update" from the Actions menu.




4. The Mass Update panel will appear below the search bar. Set values for the field(s) you wish to alter.
    - To add additional fields for mass update, click the Plus icon to the right of the dropdown list.
    - Note: For the Teams field, mark "Append Team(s)" to add the teams specified here to any existing team assignments. Not marking the checkbox will replace the existing team assignment with the new one.



5. Click "Update" to save the changes to all of the currently selected case records.

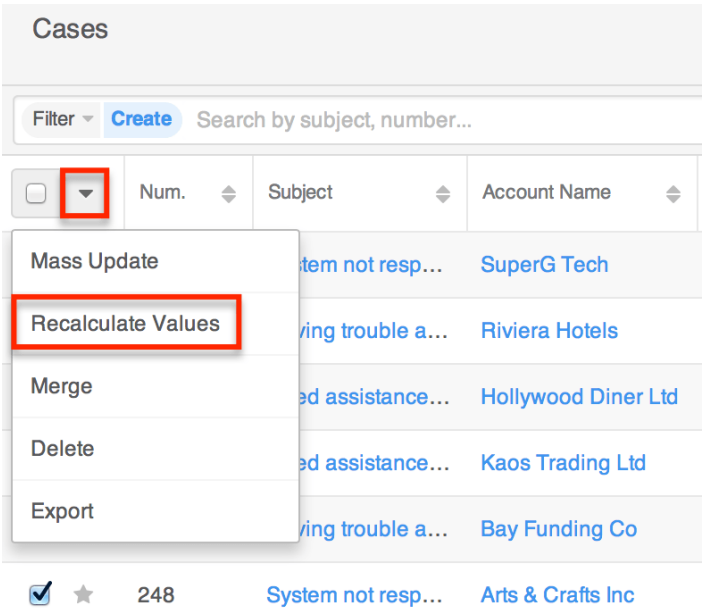
## Recalculating Calculated Values

This feature allows calculated values to be recalculated following the addition or alteration of a calculated field in Studio. For more information on calculated fields, please refer to the Studio documentation in the Administration guide. Sugar allows you to select up to 1000 records at a time for recalculating values. If you desire to recalculate values for more than 1000 records, you will need to perform the recalculation in several batches.

Note: This action will not appear unless the user is an Admin or has developer-level access to the module and if there is at least one calculated value in that module. Please note that your ability to recalculate values may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Recalculate Values option.

The following steps cover recalculating values for records from the Cases list view as an example:

1. Navigate to the Cases list view by clicking the Cases module tab.
2. Use the list view's Module Search to identify cases you wish to update.
3. Select the desired cases then choose "Recalculate Values" from the Actions menu.



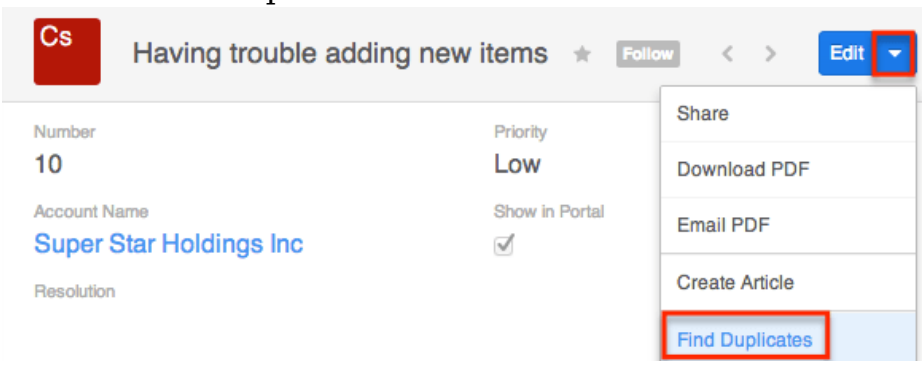
# Finding Duplicate Cases

Between multiple users working in Sugar, importing new records, and converting leads, it is possible for duplicate note records to be accidentally input to the system. Before creating a new note record, a good practice is to first check that the note does not already exist in Sugar. You can locate duplicate records for cleanup using module search from the Notes list view. Searching for notes with similar names or other information can turn search into a powerful, duplicates-finding tool. Sugar also provides a wizard for finding potential duplicates that is available from the Notes record view and may be used as shown below. If duplicate note records are detected, you can perform a merge per the Merging Cases section of this documentation.

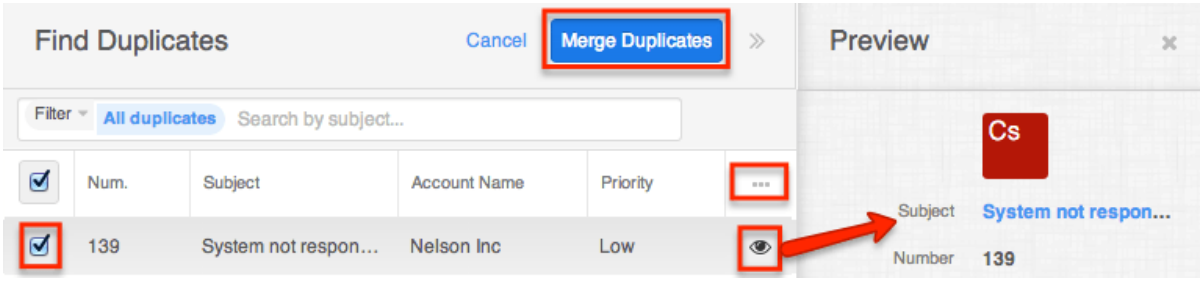
Please note that your ability to use the Find Duplicates action may be restricted by any role which prevents note deletion. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Find Duplicates option.

Use the following steps to locate duplicate notes using the Find Duplicates option from the Notes record view:

1. Navigate to an note's record view.
2. Choose "Find Duplicates" from the Actions menu.




3. Potential duplicate note records will be listed on the Find Duplicates page. Select the duplicate record(s) you wish to merge then click "Merge Duplicates".
    - You can preview the duplicate record's details by clicking the Preview button to the far right of the records row.
    - You can search for specific records from the Notes list view if you wish to check for more possible duplicates. For more information on performing a search, please refer to the Module Search section of this documentation.
    - You can also click the Column Selection icon above the Preview button to change the list of fields that display on the list view column headers.




Once you click "Merge Duplicates", the merging process with the current record will begin. For instructions on performing the merge that follows, please refer to Steps 3-9 of the Merging Via List View section of this documentation.

## Merging Cases

When duplicate records are identified in Sugar, you have the option to merge two or more cases into a single record. Once the merge is complete, the duplicate case record(s) will be deleted, and the primary record will remain. Please note that all relationships belonging to the duplicate cases will be merged to the primary record meaning that any calls, meetings, contacts, etc. related to the duplicate case record(s) will automatically be related to the resulting, merged case record.

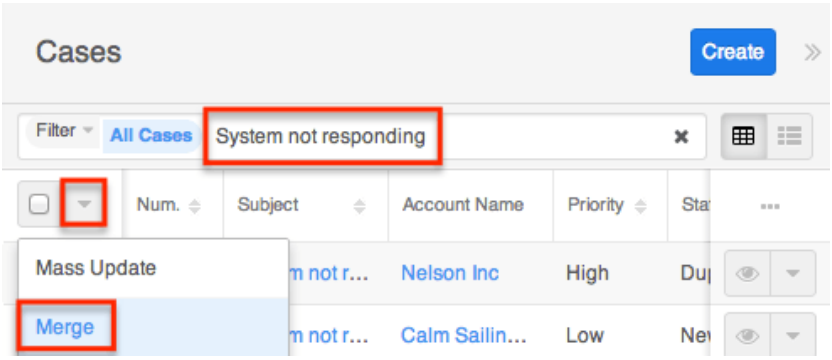
Note: Date Created, Date Modified, and Password field types are not supported when merging duplicate records in Sugar.

### Merging Via List View

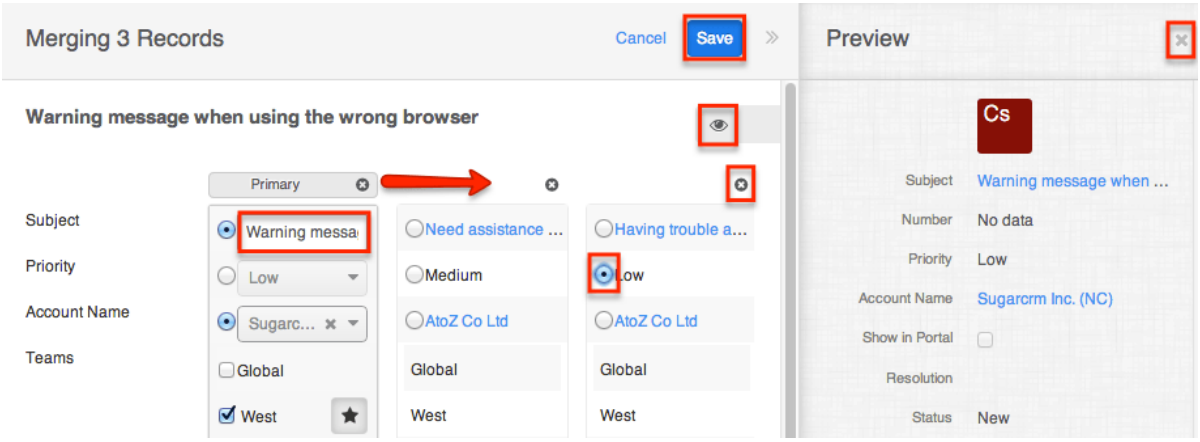
Module Search may be used to identify duplicate cases by, for example, searching for cases with similar names or related accounts. Once your search has identified duplicate cases, you can merge them directly from the Cases list view.

Use the following steps to merge cases via the list view:

1. Use the list view's Module Search to identify duplicate cases.
2. Possible duplicates will be displayed in the list view. Select the duplicate record(s) that you wish to merge.
    - Please note that up to five records may be merged at once in Sugar. An error message ("Invalid number of records passed. The valid range is from 2 to 5 records.") will appear if more than five records are selected when attempting to perform a merge.




3. Select "Merge" from the Actions menu to display the Merging Records page. The primary record's field values are displayed on the left while other record's values are in columns to the right. For convenience, fields with differing values will appear on the top of the list. Saving the merge will preserve only the field values marked with the radio button into a single record.




If 3 or more records are selected to be merged, an X icon will appear at the top right of each record. Clicking the "X" will remove the record from the merge process but will not delete the record.

4. To change which record is considered the primary, drag and drop the Primary label on the top of a different column.
5. Review the field values in each column and click the radio button to the left of the value that should appear on the final record. You can also manually type or select a new value for any field as necessary.
    - Note: Fields you do not have Edit access for cannot be edited on the merging records page.
6. Preview what the final, merged record will contain as you work by clicking the eye icon to display the preview in the Intelligence Pane.
7. Click "Save" once all fields you wish to appear on the single, merged record have their radio buttons selected.
8. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Confirm" to proceed.

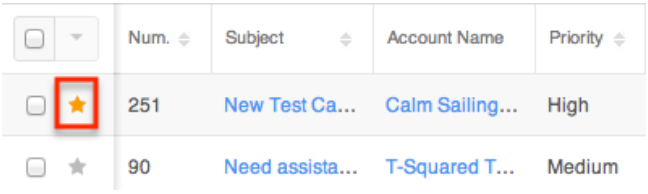
# Favoriting Cases

Each Sugar user has the option to designate their own favorite cases which are important or will be viewed often so that they can easily be accessed via search or from the Cases module tab. Once records are marked as favorites, use the My Favorites filter in Module Search to retrieve your favorites or select from your most recent favorites directly from the Cases Module Tab .

## Favoriting Via List View

Use the following steps to mark records as favorites via the Cases list view:

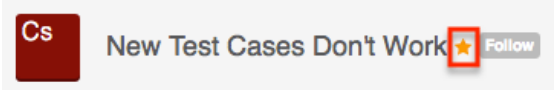
1. Navigate to the Cases list view by clicking the Cases module tab.
2. Use the Module Search to find the Cases records you wish to mark as favorites.
3. Mark the star icon on the left of each desired case's row.
4. To remove the case as a favorite, click the star again to revert it to white.




## Favoriting Via Record View

Use the following steps to mark records as favorites via the Cases record view:

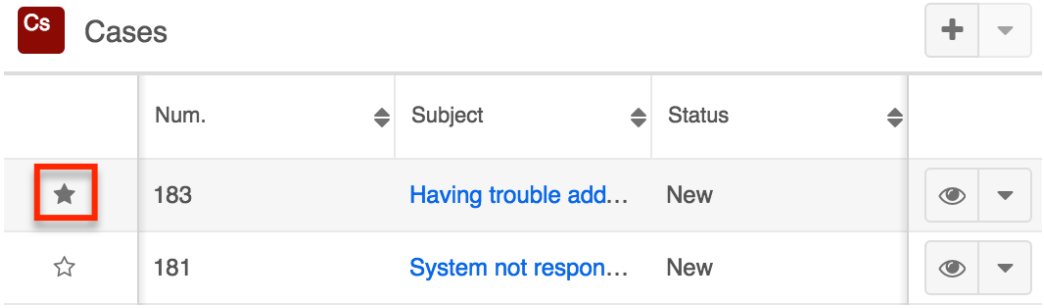
1. Navigate to a case record's record view.
2. Click the star icon to the right of the case's name in the upper left of the record view to designate it as a favorite.
3. To remove the case as a favorite, click the star again to revert it to white.




## Favoriting Via Subpanel

Use the following steps to mark case records as favorites via the subpanel in related modules:

1. Navigate to a related module's record view.
2. Click the star icon to the left of the desired record's row in the Cases subpanel.




3. To remove the case as a favorite, click the star again to revert it to white.

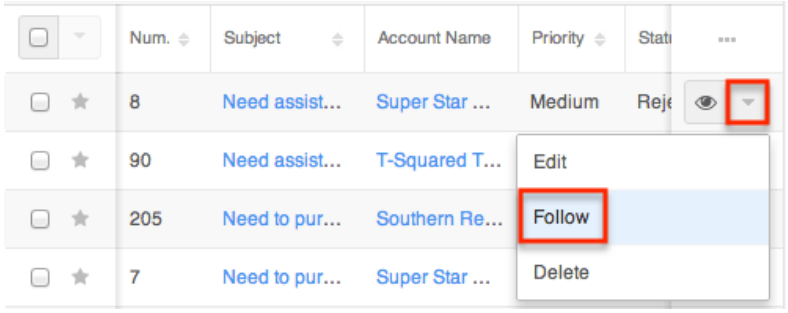
## Following Cases

Users can also choose to follow specific case records to which they have access to in Sugar by clicking the Follow button (If grayed out) to the right of the case's name. This allows each user to personalize their activity streams by specifying which records' posts should appear on the activity stream displayed on their Home page and Cases list view. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. Should a user lose access to a record in Sugar, they will automatically stop following that record.

### Following Via List View

Use the following steps to mark a record to follow via the Case's list view:

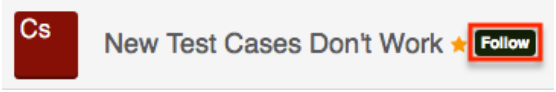
1. Navigate to the Case's list view by clicking the Bugs module tab.
2. Use the Module Search to find the Case records you wish to follow.
3. Click the Record Actions menu to the far right of the records row and select "Follow".



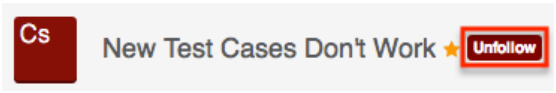
### Following Via Record View

Use the following steps to mark a record to follow via the Case's record view:

1. Navigate to a Case's record view.
2. Click the Follow button to the right of the Case's name.




3. To unfollow the case, click the Follow button again to revert it to gray.




## Create Article

You can create Knowledge Base articles relating to specific bugs and cases. This is particularly useful when the bug fix or situation will not be resolved until a later date, but a work-around currently exits.

Please note that your ability to edit case reports in Sugar may be restricted by a role. For more information on roles, please refer to the Roles Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

The record view layout opens when creating the article directly from the Knowledge Base menu and includes all of the relevant fields for your organization's articles.

- Draft : The article is still undergoing changes.
- Expired : The article is outdated.
- In Review : The article is being reviewed by the designated approver. When this status is set a notification email is sent to the Approver.
- Published : The article is finished.

In order for an article to be visible through the Sugar Portal, the article must meet all of the following requirements:

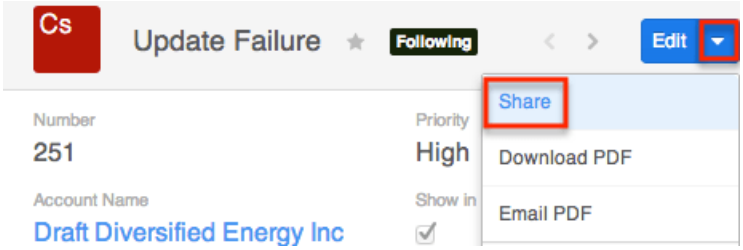
- External Article = Checked
- Status = Published
- Expiration Date = In the Future

If any one of these conditions is not met, the article will not be visible through the Sugar Portal.

For more information please refer to the Knowledge Base .

## Sharing Cases

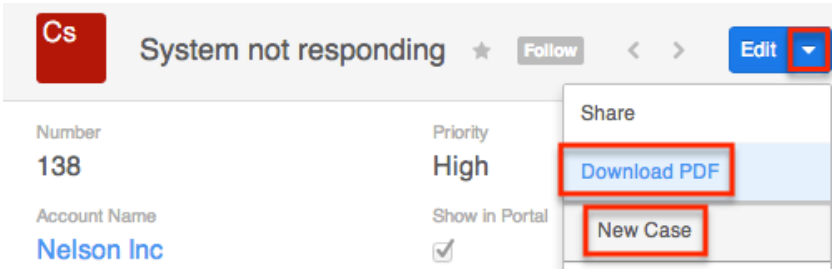
Individual Case records can be shared with other users in your organization by sending an email with the record's link directly from the record view. In the case's record view, select "Share" from the Actions menu which will open a Compose Email window including the URL of the case record. Enter the recipient(s) email address in the To field then click "Send".




Users can simply click the link in the email to access the case record in Sugar. Please note that the user must be logged into Sugar in order to access the record. Users will only be able to view the shared record as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team and Role management documentation in the Administration guide.

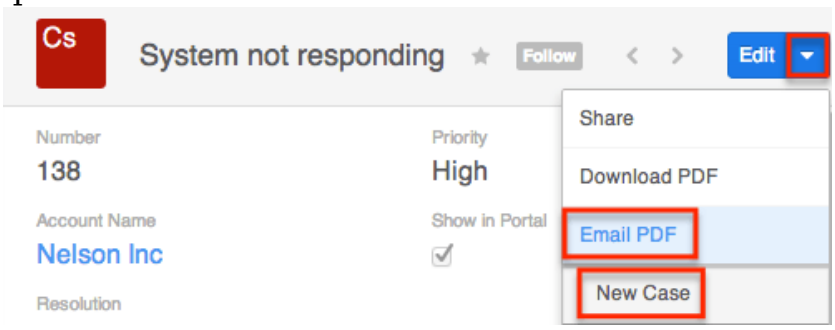
## Downloading Case Information as a PDF

Users have the option to download case information as a PDF file via the Cases record view by clicking the Actions menu and selecting "Download PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Download PDF option in the Actions menu. Simply select one of the templates to generate the PDF file to view or save onto your local machine. Please note that the Download PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.

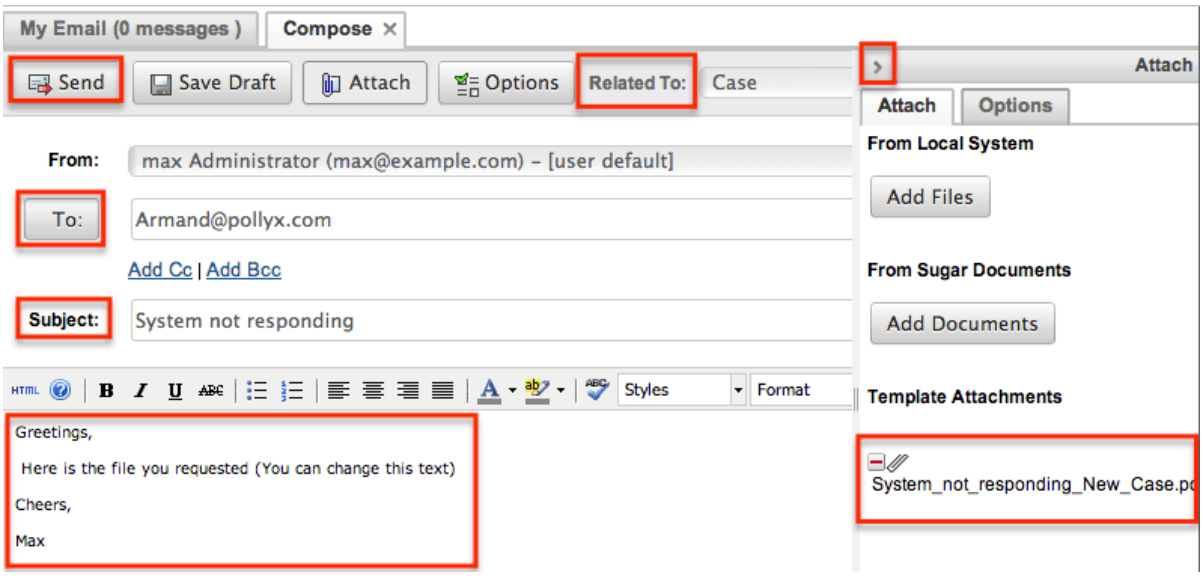



## Emailing Case Information as a PDF

Users also have the option to email case information as a PDF file using any of the available Cases module templates using Sugar's email client. Simply click the Actions menu and select "Email PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Email PDF option in the Actions menu.



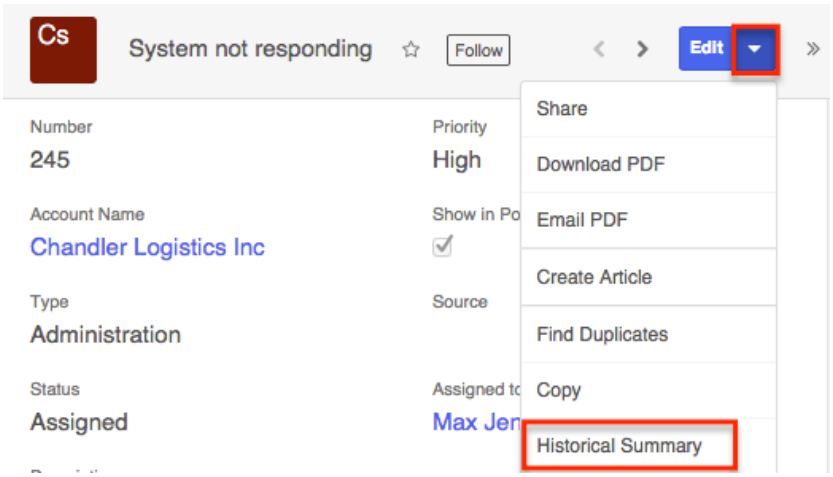

Select one of the templates to open a Compose window in the Emails module. The email's To field will automatically populate with the email address of the case record, and the Subject field will display the case's name. The email is automatically related to the case record, and the chosen case PDF will be attached. You can update the fields as necessary and enter a body for the email message then click "Send". For more information on sending emails via the Emails module, please refer to the Emails documentation.




Please note that the Email PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.

## Viewing Activities' Historical Summary

Users can easily view quick details for the various related activities (e.g. calls, meetings, notes, emails, etc.) that have taken place via the Historical Summary option. Simply navigate to the case's record view and select "Historical Summary" from the Actions menu to view the activities related to the case in one place.

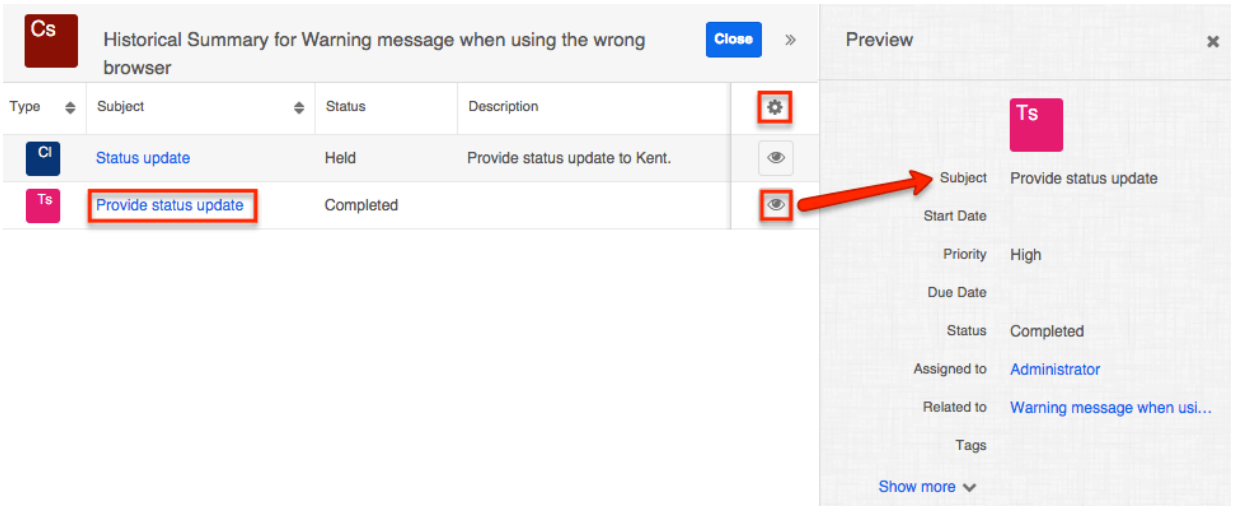



The Historical Summary page will display each activity's type, subject, status, description, date modified, etc. and you can simply click the activity's name to view the full details for each activity. Please note that you can add Date Created and

User fields by clicking the Column Selection icon to the far right of the list view column headers. You can also preview the activity record via the intelligence pane by clicking the Preview icon to the far right of each record's row. It will provide users with key information regarding the record as well as the related activity stream information (if any). For more information on activity streams, please refer to the Activity Streams documentation. Please note that preview is only available for modules (e.g. Task, Note) using the Sidecar user interface.

The historical summary list view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the system's default column order.

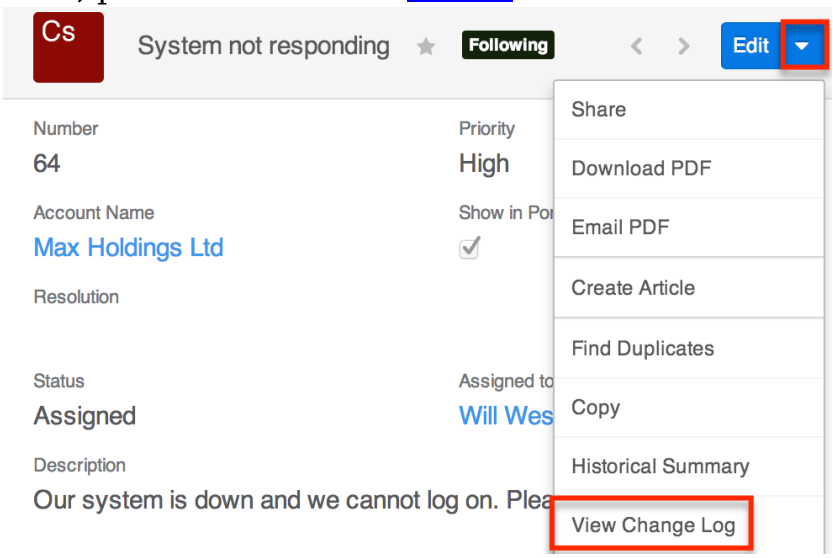
Users can also easily adjust the size of columns in the historical summary list view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the Historical Summary list view is different from the default column width.



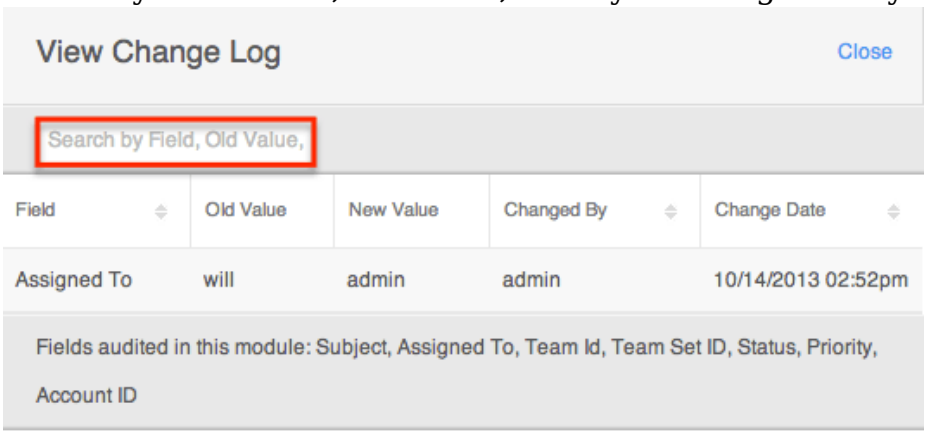

## Viewing Case Change Logs

Changes made to each case record are tracked over time, and users are able to view the history of changes via the change log in each case's record view. To view

the change log, navigate to a case in record view and select "View Change Log" from the Actions menu. Please note that only fields marked as "Audit" in Admin > Studio will be displayed in the change log. For more information on designating for audit, please refer to the Studio documentation in the Administration guide.




Once the change log opens, you can view the details of historical changes and can search by field name, old value, etc. by entering the keyword into the search box.




# Communicating Regarding Cases

Sugar facilitates communication between customers and the support team by archiving conversations held via email or Sugar Portal. The following sections introduce how to leverage inbound email, email archiving, and the Case Portal to store email conversations in Sugar.

## Communicating Via Emails

Sugar can archive emails to cases and display the messages in the History Dashlet

One way that the emails can be received in Sugar to use the case macro is through a monitored inbound mailbox. This is a mailbox on your company's mail server that Sugar is granted the ability to read. For example, this would function where an email is sent from to support@mycompany.com and includes a proper case macro. Sugar would then poll the mailbox, find the case macro, and associate the email to the specified case in the macro. This can also be used by support representatives who are directly emailing with a customer. The group mailbox can be CC'd and, using the case macro, have the email thread archived. For more information on configuring an inbound email box, please refer to the Inbound Email documentation.

The other option that users have to archive emails is using Sugar's Email Archiving functionality. Email Archiving must be configured and enabled by administrators in Sugar via Admin > Email Settings. Once configured, an email address will be generated that is specific to your instance of Sugar. When this email address receives an email, it scans the email for any email addresses. The email is then imported into Sugar, where the email is associated to any contact, lead, etc. containing an email address on the email. When including the case macro on the email, Sugar will also import this email to the referenced case. For more information on setting up Email Archiving, please refer to the Email Archiving documentation in the Administration guide.

When using email communication, please note that administrators in Sugar must first configure the outbound mail server for the system via Admin > Email Settings in order for users to send outbound emails. For more information on setting up the system email settings, please refer to the Email documentation in the Administration guide. Users will also need to have their email settings configured in their user preferences prior to sending outbound email from the Emails module or Cases module. For more information on setting up your user preferences' email settings, please refer to the Getting Started documentation.

## Communicating Via Portal

The Case Portal can be used to both view and submit cases from a customer to a support department, but can also be used as a method of communication regarding a case. Both customers and Sugar users have the option to add notes to cases. Users can do this via the History Dashlet . Customers have this as an available option when viewing the details of a case. For more information on using the Case Portal, please refer to the Portal Deployment User Guide . When a customer adds a note to the portal, the note will be available for viewing inside Sugar. Alternately, when a user adds a note to a case from Sugar and the "Display in Portal?" checkbox is selected on the note, the note will be available to view in the portal. These notes are visible by anyone tied to the account that the case is associated to and with access to the support portal. For more information on the Notes module, please review the Notes documentation.

Last Modified: 03/02/2016 11:07am

# Knowledge Base

## Overview

Sugar's Knowledge Base module provides the ability to create, maintain, and publish articles. Knowledge Base articles can cover a variety of topics like case resolutions or frequently asked questions and can be used for internal reference or published externally via the Sugar Portal. Once an article is created, you can view and edit information pertaining to the article via the detail view. This documentation will cover how to use the Knowledge Base module as well as the various actions and options available from within the module.

## Knowledge Base Fields

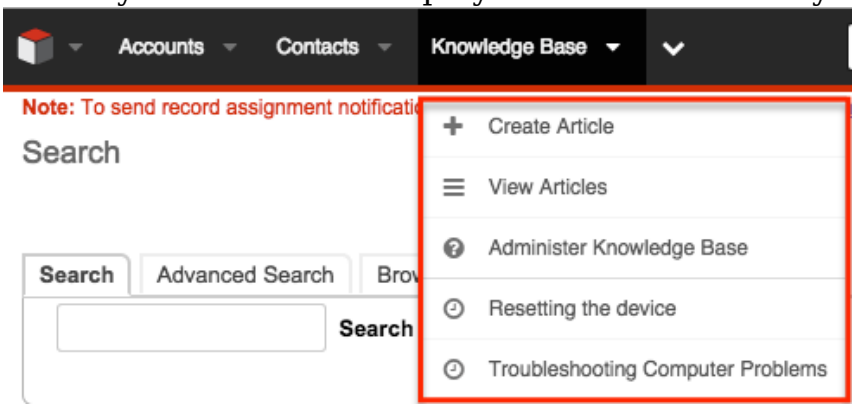
The Knowledge Base module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.

| Field | Description |
|---|---|
| Approver | The Sugar user to approve the article<br>Note: When selecting "In Review" status; defaults to the admin user. |
| Attachments | Any external files to be attached to the article |
| Author | The Sugar user who owns the article<br>Note: Defaults to the current user |
| Body | The HTML content of the article |
| Expiration Date | The date the article information is expired |
| External Article | Determines if an article is visible through the Sugar Portal |
| Revision | The article's current revision number |
| Status | The current status of the article (e.g. Draft, Expired, In Review, Published) |
| | |

| | |
|---|---|
| Tags | Which topics or categories are assigned to the article |
| Teams | The Sugar team(s) assigned to the article |
| Title | The title or designation of the article |

## Knowledge Base Module Tab

The Knowledge Base module tab is typically found by clicking the arrow to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Knowledge Base" to access the list view. Once the Knowledge Base module tab displays on the navigation bar, you can click the triangle within the tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of articles you last viewed in the module.




The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|---|---|
| Create Article | Opens the edit view layout to create a new article |
| View Articles | Opens the list view layout to search and display articles |
| Administer Knowledge Base | Opens up the admin page to configure the Knowledge Base |

If you do not see the Knowledge Base module tab in Sugar, please check the following:

- The Knowledge Base module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Knowledge Base module in the Hide Modules list, simply move it to the Display Modules list. For more information

on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Knowledge Base module for your entire Sugar instance. Reach out to your Sugar administrator to have the Knowledge Base module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

## Creating Articles

There are a few methods for creating articles in Sugar including via the Knowledge Base module, duplication, and from a case record. The edit view layout opens when creating the article directly from the Knowledge Base menu and includes all of the relevant fields for your organization's articles.

- Draft : The article is still undergoing changes.
- Expired : The article is outdated.
- In Review : The article is being reviewed by the designated approver. When this status is set a notification email is sent to the Approver.
- Published : The article is finished.

In order for an article to be visible through the Sugar Portal, the article must meet both of the following requirements:

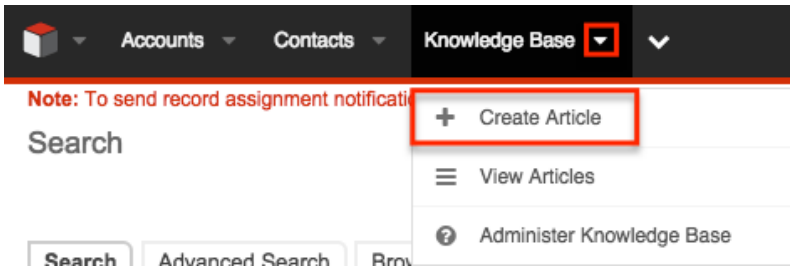
- External Article = Checked
- Status = Published

If either of these conditions is not met, the article will not be visible through the Sugar Portal.

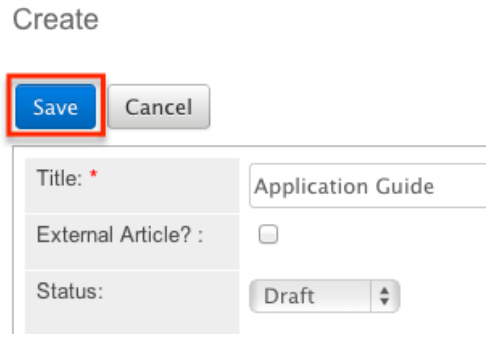
### Creating Via Knowledge Base Module

One of the most common methods of article creation is via the Create Article option in the Knowledge Base module tab. This opens up the edit view layout which allows you to enter in all the relevant information for the article.
Use the following steps to create an article via the Knowledge Base module:

1. Click the triangle in the Knowledge Base module tab and select "Create Article".




2. Enter appropriate values for the fields in the edit view layout. Fields marked with a red asterisk as well as the article body are required and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".



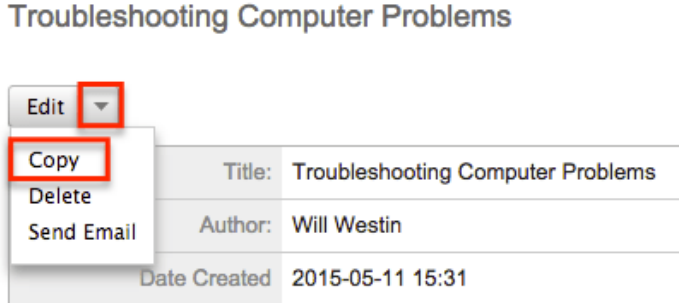

## Creating Via Duplication

You can also create a new article by duplicating an existing article. The Copy option is useful if the article you are creating has similar information to an existing article.

Note: Article tags do not copy over to the new article.

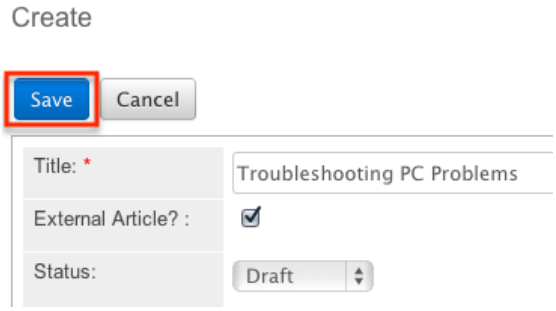
Use the following steps to create an article by duplicating an existing record:

1. Navigate to an article's detail view.
2. Click the Actions menu and select "Copy".




3. The displayed edit view is pre-populated with the original article's values. Update the necessary fields, then click "Save".
   Note: Duplicating a published article will default the new article to a status of

"Draft".

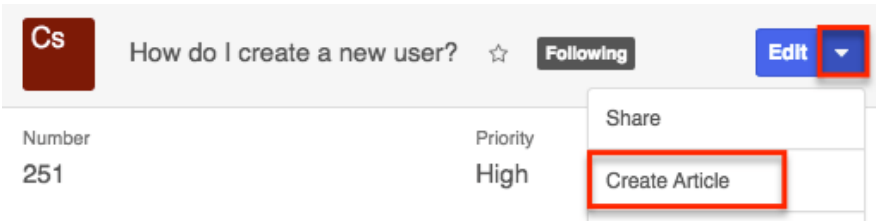



## Creating Via Cases

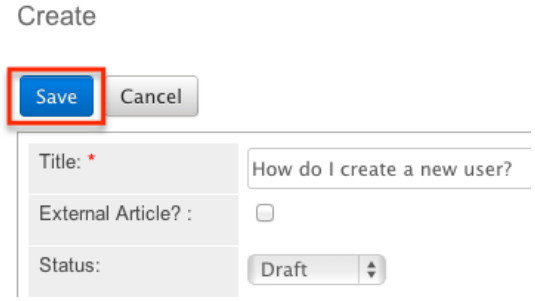
Sugar enables you to transfer details from a case record to create a knowledge base article. This is designed for situations where a case has documented a resolution to a problem. Creating an article from such records enables the user to share the information with other users without manually copying or duplicating the information. A new article is created using the subject of the case as the title of the article. The body of the new article is automatically populated with the case number, subject, description, and resolution from the case. For more information on creating and modifying cases, please refer to the Cases documentation.

Use the following steps to create an article from a case:

1. Navigate to a case's record view.
2. Select "Create Article" from the Actions menu.




3. Update the necessary fields, then click "Save".




# Viewing Articles

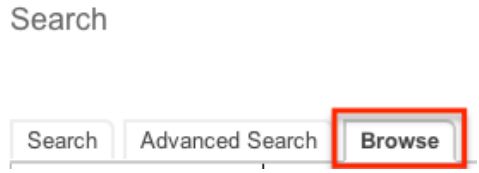
There are various options available for viewing articles in Sugar including via Knowledge Base list view, Knowledge Base detail view, Knowledge Base Last Viewed menu, and reports. Please note that you will only be able to see articles as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

## Viewing Via List View

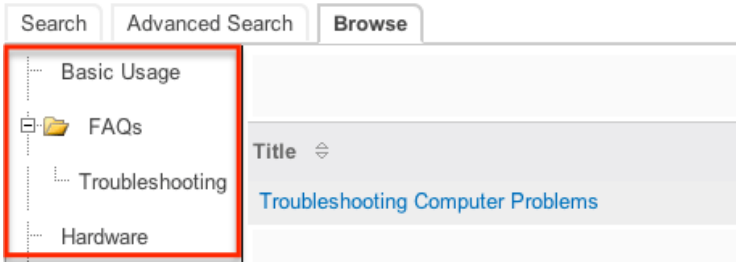
The Knowledge Base list view displays all articles meeting the current search criteria. To access the list view, simply click the Knowledge Base module tab. Before performing a search the list view populates with the top ten most viewed articles. While the list view shows key article fields, you can click the article's title to open the article in the detail view. For more information on viewing articles via list view, please refer to the Knowledge Base List View section of this documentation.

## Viewing Via Browsing

The Knowledge Base browse view displays all of the tags in a tree structure and all of the articles under each tag. To access the browse view, simply click the Browse tab on the Knowledge Base list view.




Select a tag on the left hand side of the page to view any articles assigned to that tag. If there are more tags nested under a tag, you can click the plus sign (+) to view the nested tags. All tags are visible to all users, but you will only be able to see articles as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.



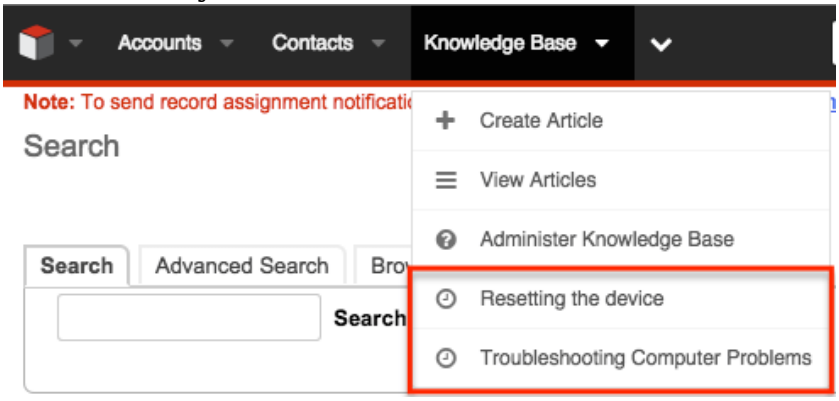

While the list view shows key article fields, you can click the article's title to open the article in the detail view. For more information on viewing articles via list view, please refer to the Knowledge Base List View section of this documentation.

### Viewing Via Detail View

The Knowledge Base detail view displays thorough article information including all article fields. The detail view can be reached by clicking an article's title link from anywhere in the application including from the Knowledge Base list view. For more information on viewing articles via detail view, please refer to the Knowledge Base Detail View section of this documentation.

### Viewing Via Recently Viewed

As you work, Sugar will keep track of which articles you have recently viewed. Click the Actions menu in the Knowledge Base module tab to see a list of your most recently viewed articles, and click each title to open the article in detail view.




### Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding articles and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. For more information on using reports, please refer to the Reports documentation.

Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

## Searching Articles

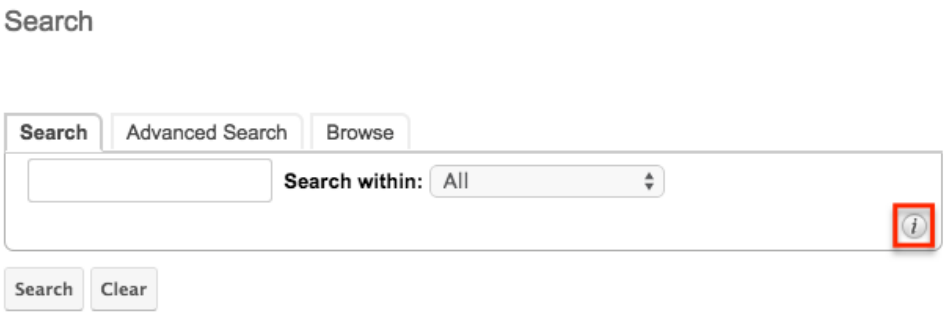
The Knowledge Base list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search

is performed, the relevant results will be displayed in the Knowledge Base list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module.

## Basic Search

The Basic Search in the Knowledge Base module utilizes the Full Text search built into the database. This is enabled and configured by default for On-Demand instances and On-Site instances running MySQL. For more information on how to enable Full Text search on MSSQL for On-Site instances, please refer to the Enabling Search on MSSQL section in the Knowledge Base Administration documentation in the Administration guide.

Basic Search offers a keyword search as well as a category option.



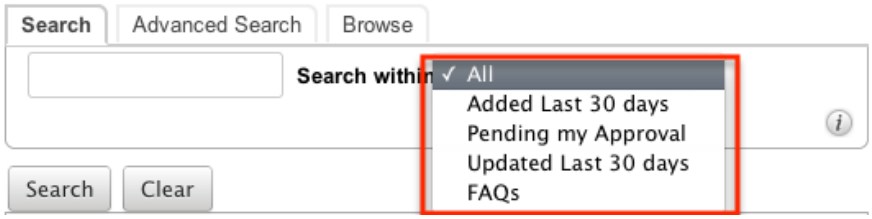

The keyword search uses syntax understood by the database sugar is running on and searches the full text index of the body of the article. Click the "i" icon to get some guidance on the syntax used for keyword searches.
The syntax listed below is specifically for MySQL although many, if not all, of these features will work on MSSQL as well:

- Case Insensitive : Searching for "device" will locate articles that contain "Device" as well.
- Phrase Search : Phrases can be searched, but must be enclosed by double quotes (e.g. "the settings screen").
- Multiple Keywords : Search for multiple keywords by separating them with a space. Sugar assumes an "or" operator between the words. For example : Search for "battery device" will find any article that contains the word "battery" or the word "device".
- Require Words or Phrases : To require a word or phrase in your results the word or phrase should be preceded by a plus sign (+). For example : Search for "+battery +device" will find any article that has the word "battery" and the word "device".
- Exclude Words or Phrases : To exclude a word or phrase in your results the word or phrase should be preceded by a minus sign (-). For example : Search for "+device -internet" will find any article that has the word "device" but

does not have the word "internet".
- Wildcards : Use an asterisk (*) to have your keyword return a partial match. For example : Search for "batt*" will return any article that contains a word that start with batt (e.g. battery).

Note: Words that contain less than four 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. There is also a list of default stop words that MySQL will exclude from Full Text Searching. For the complete list of default stop words in MySQL 5.5, please refer to the MySQL documentation location here: http://dev.mysql.com/doc/refman/5.5/en/fulltext-stopwords.html.

In addition to the keyword search you can also select a category to perform the search in.




The categories included by default are the following :

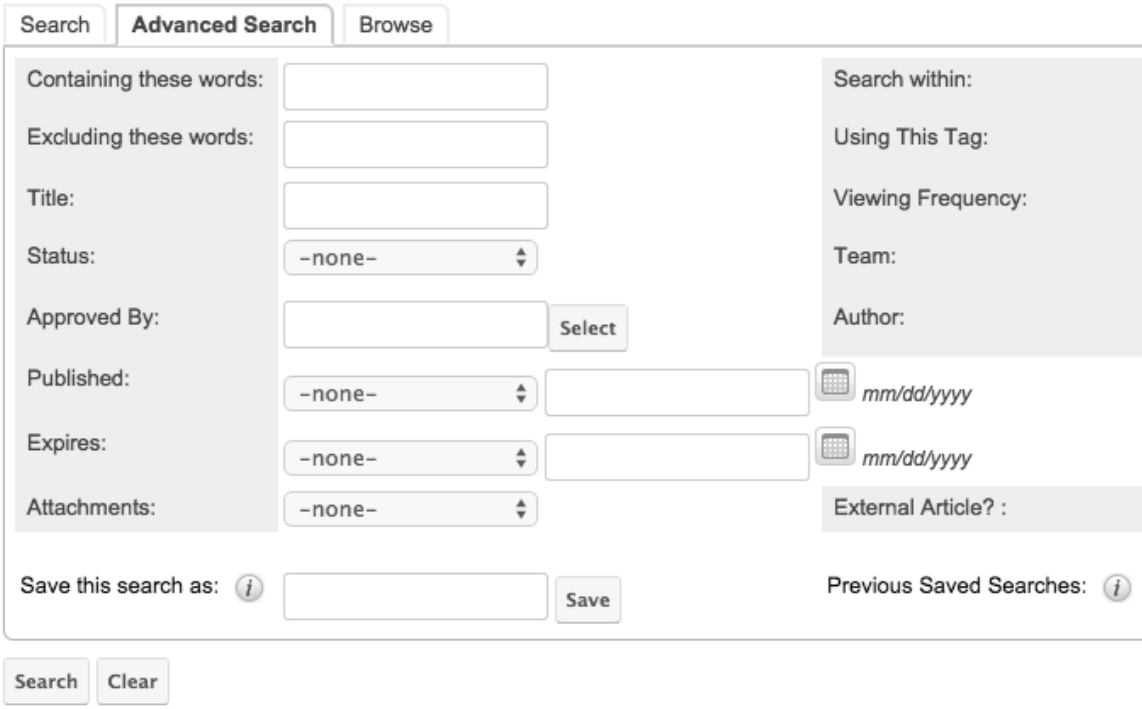
- All : Searches all articles.
- Added Last 30 days : Searches any articles created within the last 30 days.
- Pending my Approval : Searches any articles that have a status of "In Review" and the Approver are set to the current user.
- Updated Last 30 days : Searches any articles modified within the last 30 days.
- FAQs : Searches any articles currently set to the FAQ tag.

You can use the category search in coordination with the keyword search in order to find any articles containing the keyword that also matches one of the categories. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all articles to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see articles as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

## Advanced Search

Advanced Search offers a more in-depth search experience than Basic Search including additional fields and saved search capability. From the Advanced search panel, you can click "Search" for simplified searching.

The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:




- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section of the Search documentation.
- 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.
  Note: The plus sign (+) mentioned in Basic Search is not required in this section.
- Search within : Select the category to filter the results by (e.g. All, Added last 30 days, etc.).
- 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: The minus sign (-) mentioned in Basic Search is not required in this section.
- Using This Tag : Enter the tag name or click "Select" to choose the tag from the Tags list.
- Title : Enter a title name. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase.
- Viewing Frequency : Select the frequency category to filter the results by (e.g. Top 5, Top 10, Bottom 5, etc.).
- Status : Select the status to filter the results by (e.g. Draft, Expired, In

Review, or Published).

- Team : Enter the team name or click "Select" to choose the team from the Teams list.
- Approved By : Enter the person's name or click "Select" to choose a user from the Users list to see articles approved by a specific user.
- Author : Enter the person's name or click "Select" to choose a user from the Users list to see articles authored or assigned to a specific user.
- Published : Select an option from the dropdown to filter articles by published date (e.g. On a specific date, Is Between two specific dates, Last 7 days, etc.).
- Expires : Select an option from the dropdown to filter articles by expires date (e.g. On a specific date, Is Between two specific dates, Last 7 days, etc.).
- Attachments : Select an option from the dropdown to filter 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.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you filter on Status = "Published" and enter in a title to search, Sugar will only return articles with a matching title that have a Published status. Once the search completes, the relevant results will populate in the list view below the search panel. To see all articles to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see articles as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

## Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search may be used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right-hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.




To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. For more information on using and configuring Global Search, please refer to the Global Search section of the Search

documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the Search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

Note: Global Search is turned off for the Knowledge Base module by default. For more information on how to enable and disable modules for the global search, please refer to the System documentation in the Application guide.

## Knowledge Base List View

The Knowledge Base list view displays all articles meeting the current search criteria and to which your user has access. You can view the basic details of each article within the field columns. Please note that you will only be able to see articles as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

### Pagination

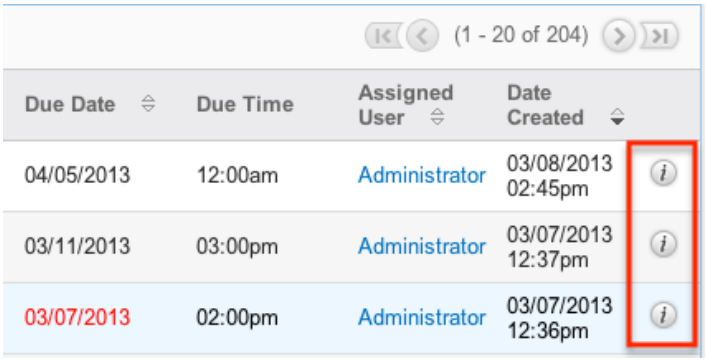
List view displays the current search results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. To the right just below the search panel you can see which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of your current results.

By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.



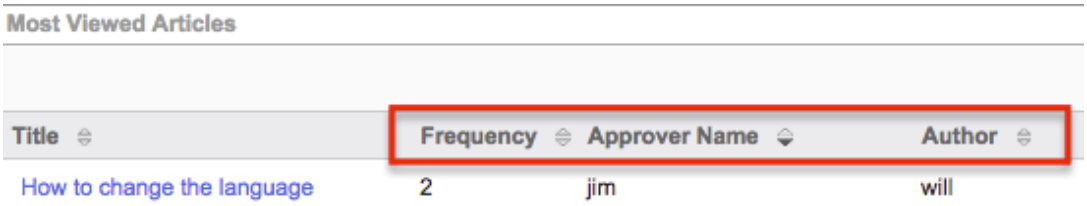

## More Information

Additional details for each article can be viewed by hovering over the title of the article. This provides users a quick view of additional information in addition to what appears in the display column fields. The resulting pop-up window will show the Publish Date, Expiration Date, External Article, and Body fields by default. The list of fields appearing here may only be configured through a code-level customization.




## Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time.



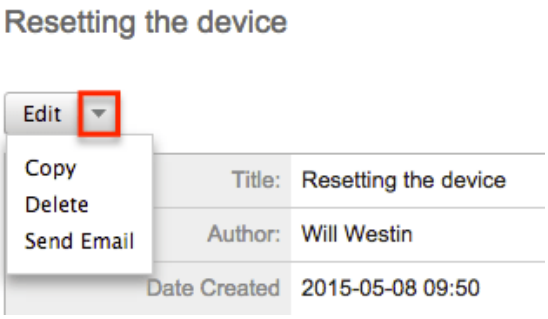

# Knowledge Base Detail View

The Knowledge Base detail view displays thorough article information including all knowledge base fields. The detail view can be reached by clicking an article's link from anywhere in the application including from the Knowledge Base list view.

Please note that you will only be able to view an article according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

## Actions Menu

The Actions menu on the top left of each article's detail view allows you to perform various actions on the current record. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the System documentation in the Administration guide.

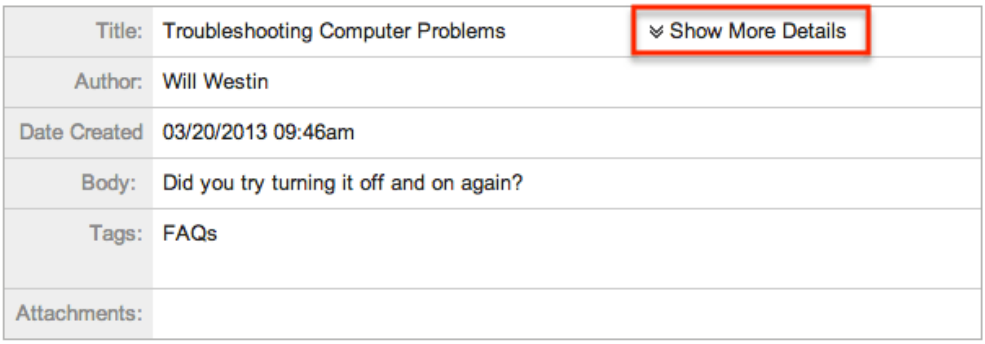



The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this article |
| Copy | Duplicate this article |
| Delete | Delete this article |
| Send Email | Send an email with the contents of this article |

## Show More Details

The Knowledge Base detail view hides some of the fields on the article by default. Click "Show More Details" to reveal the following fields: External Article?, Status, Team, Approver, Publish Date, Revision, and Expiration Date.




## Editing Articles

Articles may be edited at any time to update or add information to the record. You can make changes to existing articles via the Knowledge Base edit view. Edit view is available within the Knowledge Base module and includes all of the article fields you should need.




Please note that your ability to edit articles in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

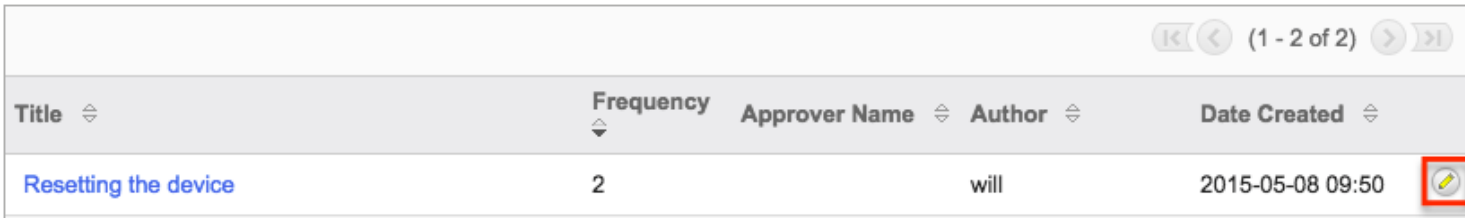
### Editing Via Detail View

You can edit articles via the detail view by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve the changes.




### Editing Via List View

You can edit articles via the list view by clicking the Pencil icon to the right of each row. The article will open directly to the edit view. Update the necessary fields, then click "Save" to preserve the changes.



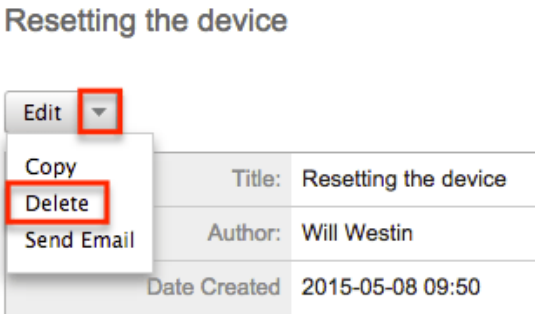

## Deleting Articles

If an article is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from the Knowledge Base detail view.
Please note that your ability to delete articles in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

### Deleting Via Detail View

Use the following steps to delete an article via the detail view:

1. Navigate to an article's detail view.
2. Select "Delete" from the Actions menu.

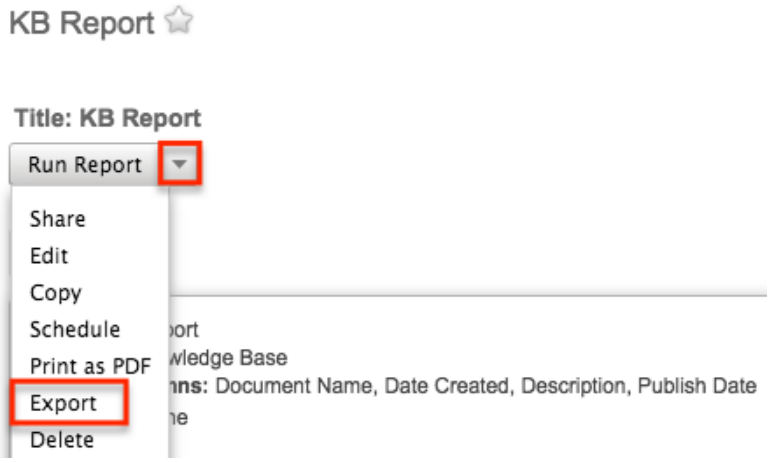



3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

## Exporting Articles

Sugar's Export option allows users to download all fields for articles to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use article data with other software such as Microsoft Excel. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of articles. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Users with access to the Reports module have the option of creating or accessing reports containing specifically chosen fields for articles and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the




Please note that your ability to export articles from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

## Tags

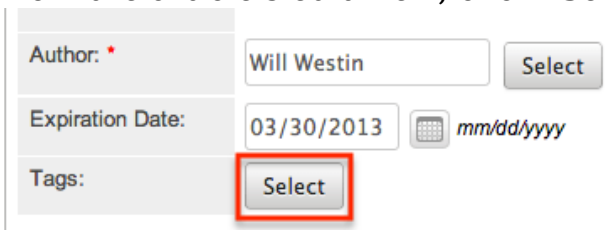
Tags are similar to folders and enable you to categorize articles according to specific criteria, such as a topic, to make locating articles easier. When you tag an article, the system creates a link between the tag and the article which resides in the Sugar database. An article can be linked with more than one tag. Similarly, a tag can be linked with multiple articles. Tags can be parent tags or child tags. Parent tags are the top most category and child tags are nested within parent tags.

## Creating Tags

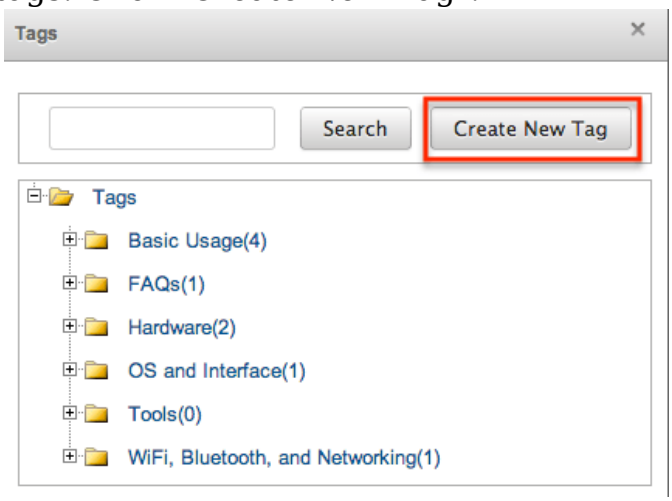
Administrative users can create tags from the Knowledge Base Administration page. For more information on how to create tags from Knowledge Base Administration please refer to the Knowledge Base Administration document in the administration guide. Users who do not have admin or developer access can create tags while creating or editing an article.

Use the following steps to create a tag while creating or editing an article:

1. From the article's edit view, click "Select" in the Tags field.

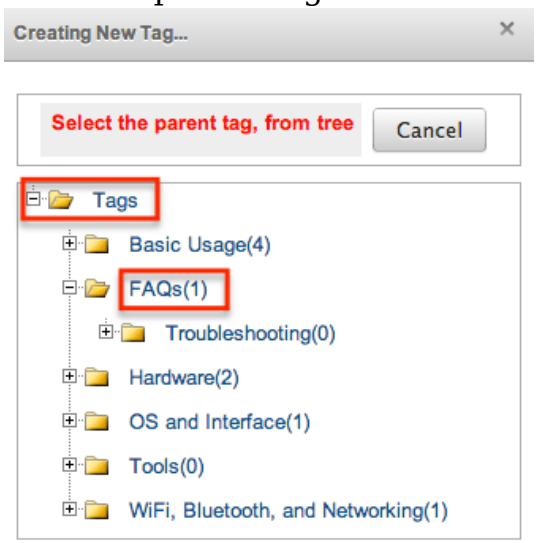



2. This opens up the tags dialog box where you can search and select existing tags. Click "Create New Tag".

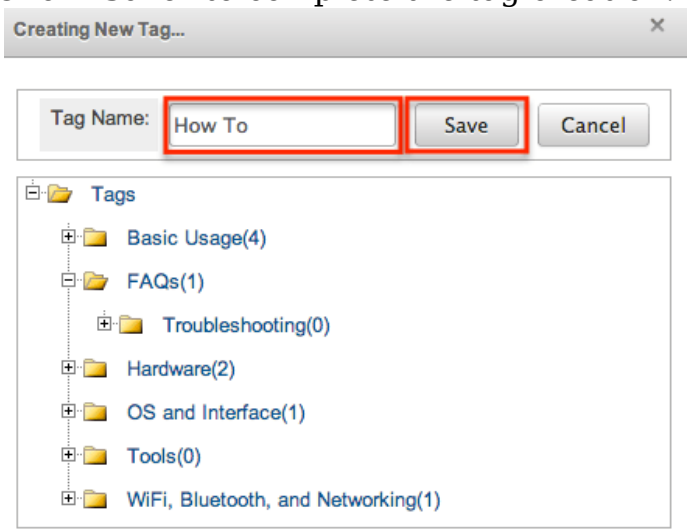



   Note: The numbers next to the tag name indicate the number of articles currently tagged.
3. The dialog then prompts you to select a parent tag. Click any tag in the tree to nest the new tag underneath. If the tag you are creating should be a new parent tag, select "Tags" in the tree to add the new tag to the same level as

the other parent tags.




4. Click "Save" to complete the tag creation.



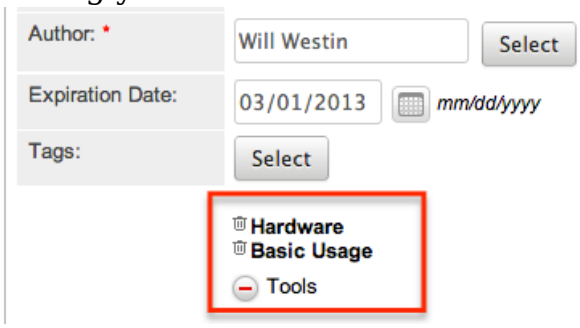

5. The tags dialog box remains open for you to continue creating new tags, or select the appropriate tag to add it to the article.

## Deleting Tags

Administrative users can delete tags entirely from the system, but only if the tag does not have any articles assigned to it. For more information on how to delete tags from Sugar, please refer to the Knowledge Base Administration documentation in the administration guide. Users who do not have admin or developer access can delete a tag off of an article while creating or editing an article.

Use the following steps to delete a tag from an article while creating or editing the article:

1. From the article's edit view, click the trash can icon in the Tags field next to the tag you wish to remove.

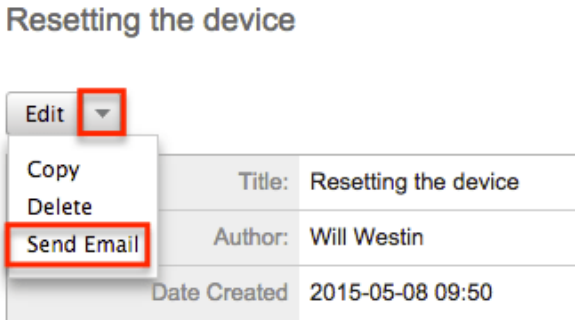



2. If you have added the tag during this edit of the article, the trash icon is replaced with a minus icon.
3. Once the necessary tags have been removed, click "Save".

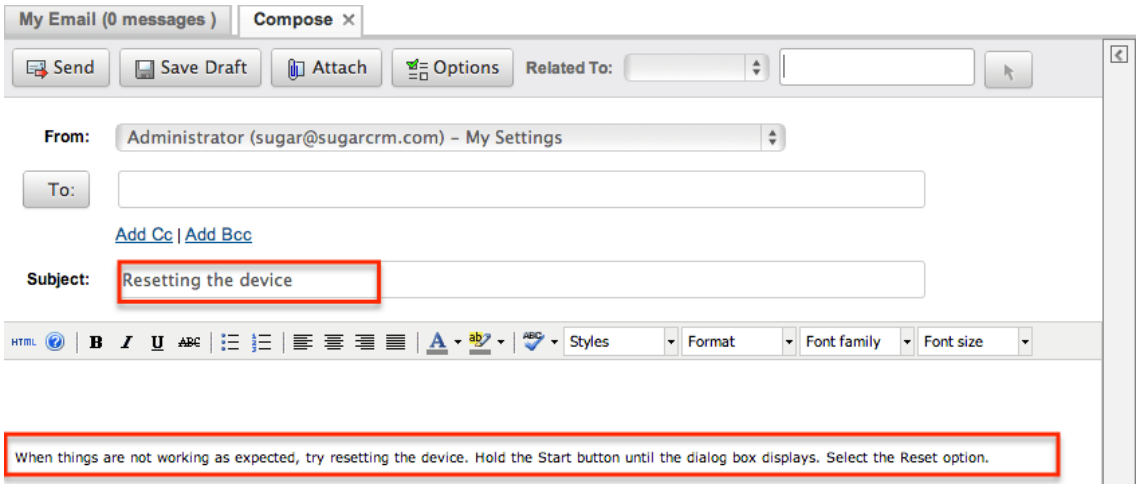
## Send Article as Email

Sugar allows users to create an email based off of the content of a Knowledge Base article. Please use the following steps to send an email from an article's detail view:

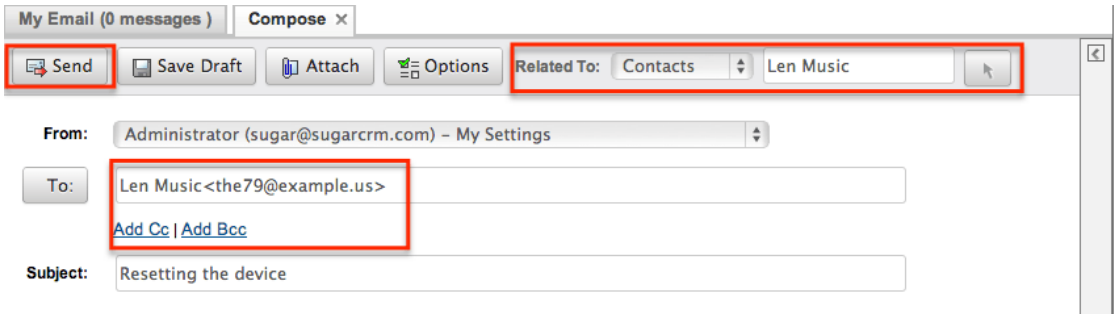
1. Navigate to an article's detail view.
2. Select "Send Email" from the Actions menu.




3. This launches a compose email within the emails module. The body of the article is automatically placed in the body of the email and the title of the article is set as the subject of the email.




4. Populate any recipients and optionally attach the email to a record in Sugar via the Related To field and click "Send"




For more information on sending emails from the Emails module, please refer to the Emails documentation.

Last Modified: 02/02/2017 01:11pm

# Bugs

## Overview

Sugar's Bugs module is used to track and manage product related problems, commonly referred to as bugs or defects, either found internally or reported by customers. The bugs can be further triaged by tracking the found and fixed in release. The Bugs module gives users a way to quickly review all details of the bug and the process being used to rectify it. Once a bug is created or submitted, you can view and edit information pertaining to the bug via the Bug's record view. Each bug record may then relate to other Sugar records such as calls, contacts, cases, and many others. This documentation will cover how to use the Bugs module as well as the various actions and options available from within the module.

Note: This module is hidden by default. The administrator must display it for your use.

## Bug Fields

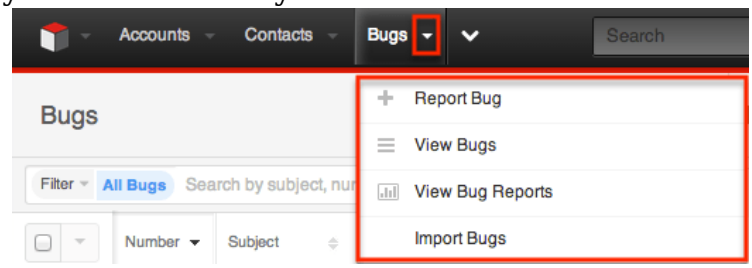
The Bugs module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

| Field | Description |
|---|---|
| Assigned To | The Sugar user assigned to the bug |
| Category | The general area of the product or service where the bug was discovered |
| Date Created | The date the bug report was created |
| Date Modified | The date the bug report was last modified |
| Description | Explanation of the details and reproduction steps of the bug when submitted |
| Fixed in Release | The version of product where the bug was fixed |
| Found in Release | The version of product where the bug was found |
| Number | An automatically incremented number to identify every bug, which cannot be edited through Sugar |
| Priority | Specify the urgency of the bug from this dropdown list |
| Resolution | Results of the investigation of the bug and how it can be fixed |
| Show in Portal | Check this checkbox if customers should be able to view this record via the Portal if applicable |
| Source | The method in which this bug was submitted, (e.g. internal, customer email, etc.) |

| | |
|---|---|
| Status | Specify the status of the bug as it moves along the process from submission to resolution |
| Subject | Brief statement of the problem |
| Teams | The Sugar team(s) assigned to the bug |
| Type | Type of categorization that this bug falls in to (e.g. Defect, Feature, etc.) |
| Work Log | Free form field to add activities and actions while working on the bug |

## Bugs Module Tab

The Bugs module tab is typically found by clicking the arrow to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Bugs" to access the list view. Once the Bugs tab displays on the navigation bar, you can click the triangle within the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of bugs you last viewed in the module. The Favorites menu displays the list of bugs you most recently marked as favorites in the module.




The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|---|---|
| Report Bug | Opens the record view layout to report a new bug |
| View Bugs | Opens the list view layout to search and display bugs |
| View Bug Reports | Displays existing reports based on the Bugs module |
| Import Bugs | Opens the import wizard to create or update bug reports using external data |

If you do not see the Bugs module tab in Sugar, please check the following:

- The Bugs module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Bugs module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Bugs module for your entire Sugar instance. Reach out to your Sugar administrator to have the Bugs module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

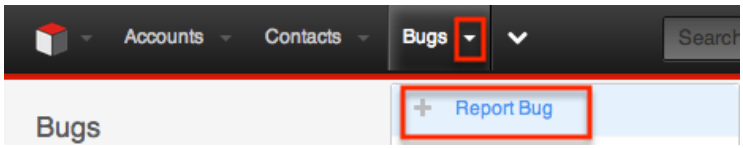
## Creating Bugs

There are various methods for reporting bugs in Sugar including via the Bugs module, quick create, duplication, and importing bugs. Customers can also submit bug reports via the Bug Portal. The full record view layout opens when creating the bug report directly from the Bugs module and includes all of the relevant fields for your organization's bugs. The quick create form is a shortened version of the bugs record view and typically contains fewer fields. When using quick create to submit a bug while viewing an existing record of another module, Sugar automatically creates a relationship between both records. For example, if you are viewing a case record and create a new bug report via the quick create form, the Cases subpanel in the bug record will automatically populate with the case you were working on, thus creating the relationship. Both the record view and quick create layouts can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

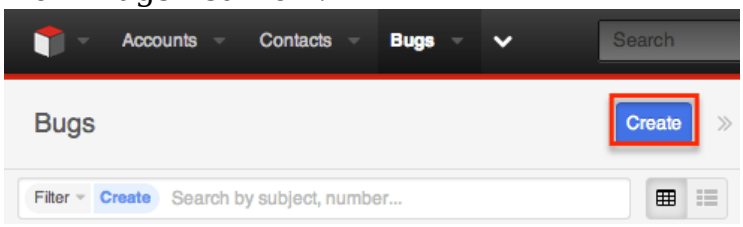
### Creating Via Bugs Module

One of the most common methods of bug submission is via the Report Bug option in the Bugs module tab. This opens up the record view layout which allows you to enter in all the relevant information for the bug.
Use the following steps to submit a bug via the Bugs module:

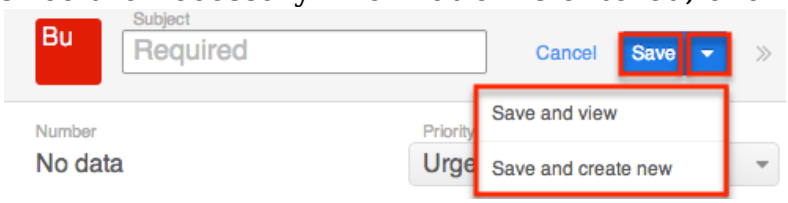
1. Click the triangle in the Bugs module tab to open the actions menu and select "Report Bug". You can also click the Create button on the upper right of the Bugs list view.
   From Bugs module tab:




From Bugs list view:



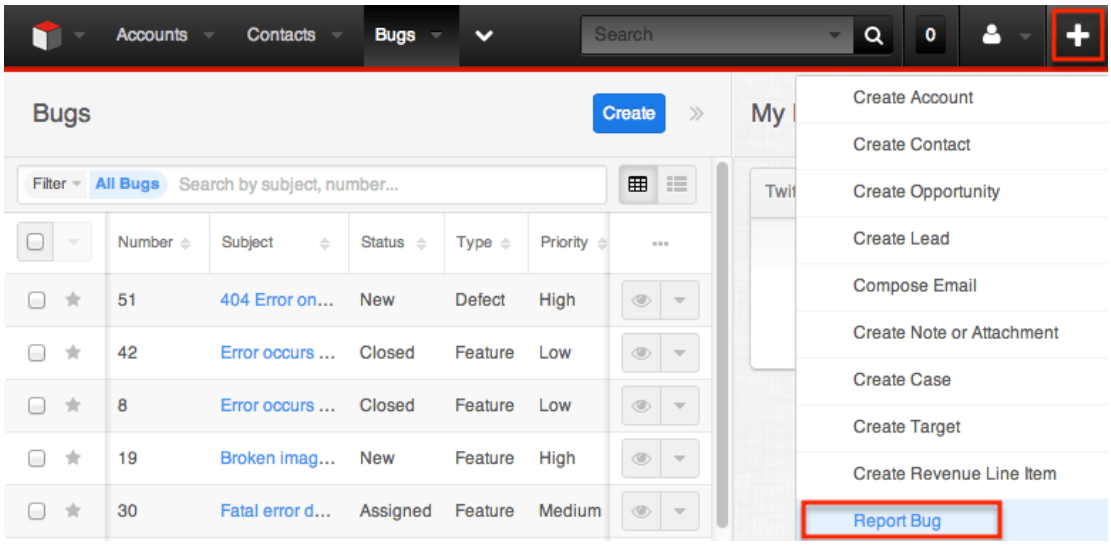

2. Enter appropriate values for the fields in the record view layout. All required fields are marked with a red asterisk and must be completed prior to saving. Note: Number is marked with a red asterisk as it is a required field, but no value is required to be added for the save to occur.
3. Once the necessary information is entered, click "Save".



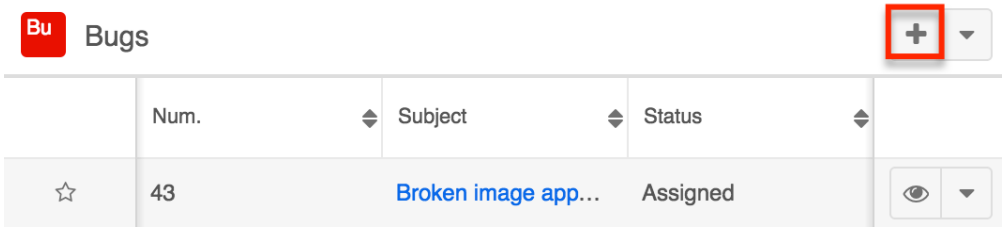

## Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also quick create a bug submission from any Bugs subpanel on related module records.
Use the following steps to submit a bug via Quick Create:

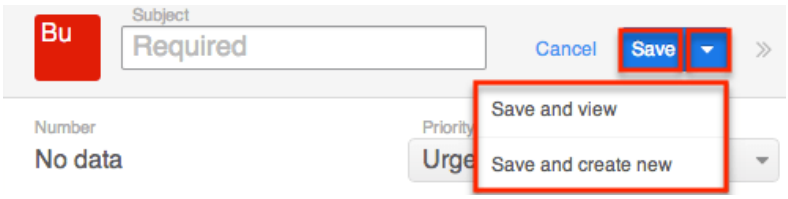
1. Open the Quick Create menu on the upper right of any Sugar page and select "Report Bug" or select "Create" on any Bugs subpanel on a related module's record view.
   Note: The Quick Create menu can be reconfigured by administrators via Admin > Configure Navigation Bar Quick Create. For more information on configuring layouts, please refer to the Configure Navigation Bar Quick Create documentation in the Administration guide.
   From Quick Create menu:




From subpanel:




2. Enter appropriate values in the fields in the quick create form. All required fields are marked with a red asterisk and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".
    - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.

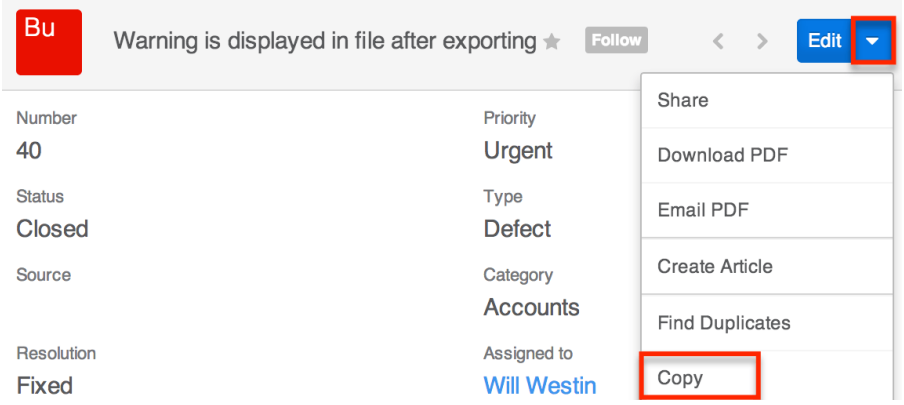



## Creating Via Duplication

You can also create a new bug report by duplicating an existing bug. The copy option is useful if the bug you are creating has similar information to an existing bug, such as similar reproduction steps, or you are creating it to tie it to a different version of your product.

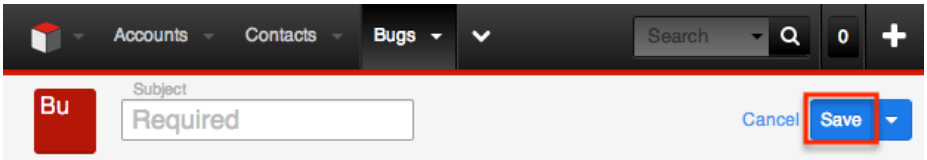
Use the following steps to create a bug by duplicating an existing record:

1. Navigate to a bug record's record view.
2. Click the Actions menu and select "Copy".



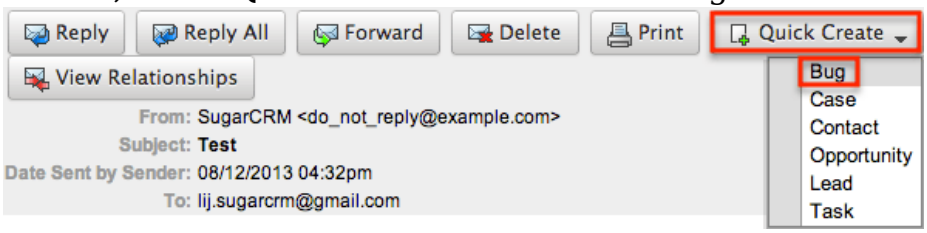

3. The displayed record view is pre-populated with the original bug's values. Update the necessary fields, then click "Save".
   Note: The bug number is not duplicated and a unique number is generated upon saving the duplicate bug record.

   - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.




## Creating Via Emails

Users in Sugar can launch a quick create form to create a bug report from an external email or from an imported email. From the emails pane in the Emails module, click "Quick Create" and select "Bug".




The quick create form opens in a popup window. The subject and description fields for the bug are populated by default with the subject and body of the email. All

required fields are marked with a red asterisk and must be completed prior to saving. Once the necessary information is entered, click "Save".

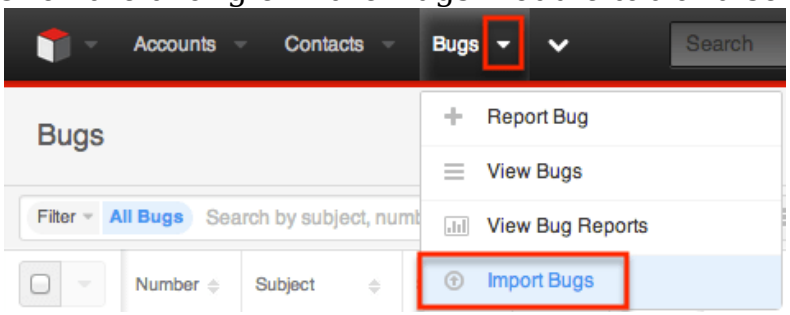
The email selected will then be imported, if not already, and will be related to the new bug report. A relationship will be made between the email and the bug created via the flex relate field.

## Importing Bugs

The import function allows you to push multiple bug reports into Sugar using a comma (or other character) delimited file instead of creating them one-by-one. For more information on importing, please refer to the Import documentation.

Use the following steps to import bug reports via the Import Bugs option:

1. Click the triangle in the Bugs module tab and select "Import Bugs".




2. In Step 1, select the source of the data you are importing. Click "Next".
3. In Step 2, select the import file and choose "Create new records only". Click "Next".
4. In Step 3, confirm the import file properties. Click "Next".
5. In Step 4, confirm the field mappings for the import. Click "Next".
6. In Step 6, view the import results.
    - The Created Records tab will show all of the new bug records.
    - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
    - The Errors tab will show records that were not imported due to errors detected during import.

## Creating Via Bug Portal

The Bug Portal allows a way for customers to submit a bug report directly into Sugar instead of a Sugar user having to input the information and report the bug manually. Customers will have to be registered users of the portal to be able to report bugs. For more information on using the Bug Portal, please refer to the Portal Deployment User Guide and Portal User Guide documentation.

# Viewing Bugs

There are various options available for viewing bug reports in Sugar including via Bugs list view, Bugs record view, Bugs Recently Viewed menu, dashlets, and reports. Please note that you will only be able to see bug records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles management documentation in the Administration guide.

## Viewing Via List View

The Bugs list view displays all bug reports meeting the current search criteria. Users can also access the activity stream to view posts specific to the bug record. For more information the Record View's Activity Stream, please refer to the Activity Stream section of this documentation. The Intelligence pane can also be viewed to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's sales, cases, activities, etc. For more information regarding the Record View's Intelligence Pane, please refer to the Intelligence Pane section of this documentation. To access the list view, simply click the Bugs module tab. While list view shows key bug fields, you can click the bug's subject to open the record in record view. For more information on viewing bugs via list view, please refer to the Bugs List View section of this documentation.

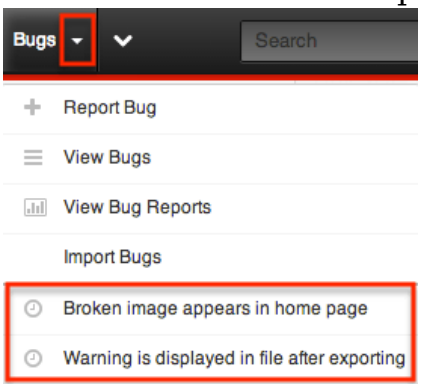
## Viewing Via Record View

The Bugs record view displays thorough bug information including all relevant bug fields followed by subpanels of the bug's related records belonging to various modules. Users can also access the activity stream to view posts specific to the bug record. For more information the Record View's Activity Stream, please refer to the Activity Stream section of this documentation. The Intelligence pane can also be viewed to the right of the record's details and allows users to view various dashlets that provide valuable data specific to the record's sales, cases, activities, etc. For more information regarding the Record View's Intelligence Pane, please refer to the Intelligence Pane section of this documentation. The record view can be reached by clicking an bug record's link from anywhere in the application including from the Bugs list view. For more information on viewing bugs via the record view, please refer to the Bugs Record View section of this documentation.

## Viewing Via Recently Viewed

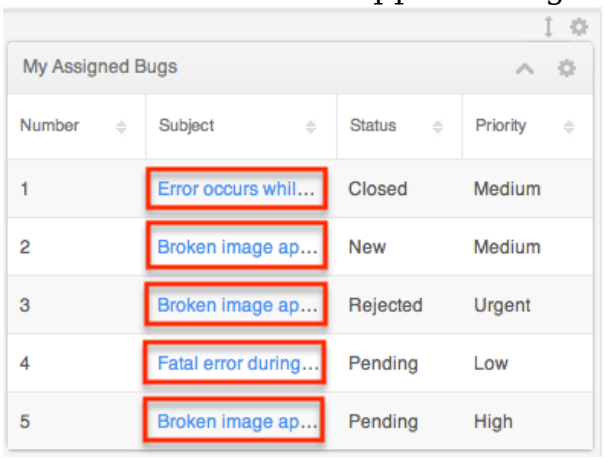
As you work, Sugar will keep track of which bugs you have recently viewed. Click

the triangle in the Bugs Module Tab to see a list of your most recently viewed bugs and click each name to open the bug in record view.



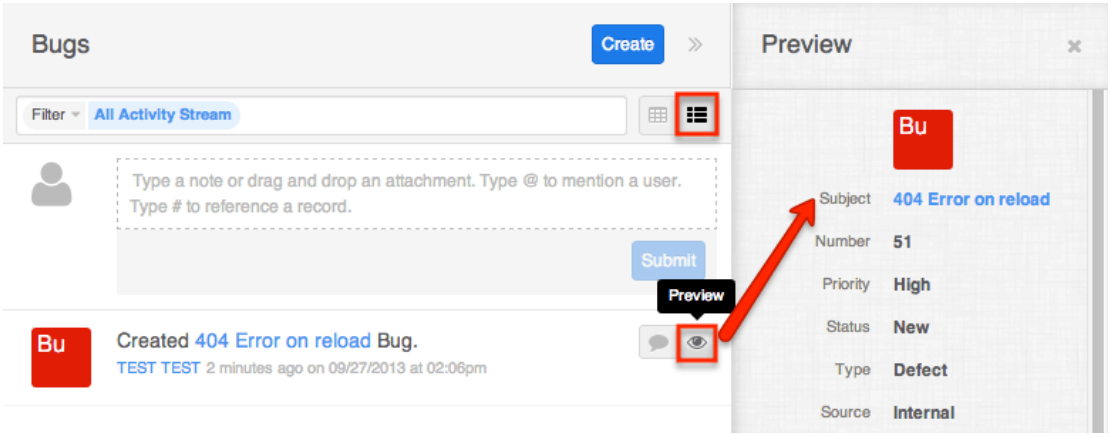

## Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets which allow users to get a quick view of various records, activities, reports, etc. You can view bug information in bug-based dashlets such as "My Assigned Bugs" as well as in dashlets based on other modules such as "My Calls". Clicking a bug's subject from any dashlet will open the bug report in record view. For more information on using dashlets and viewing bug records via dashlets, please refer to the Intelligence Pane documentation in the Application guide.



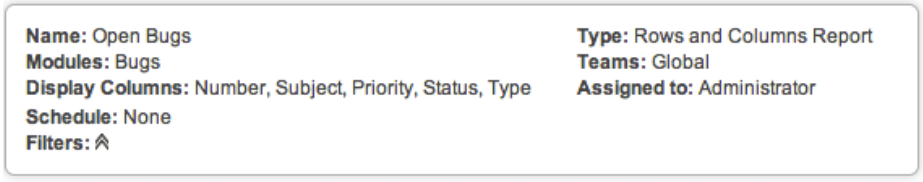

## Viewing Via Activity Streams

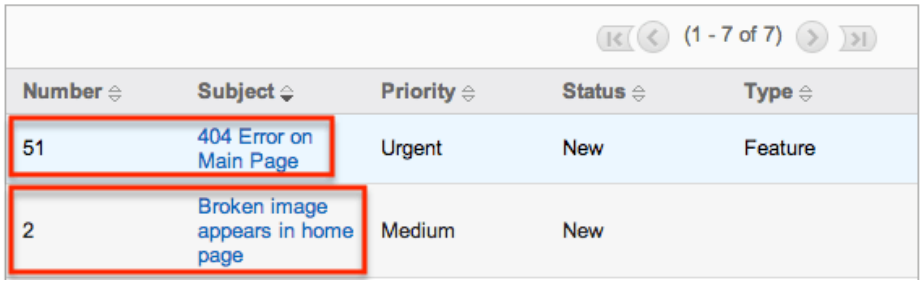
The activity stream allows users to view each other's activities in Sugar and the actions that took place for the various modules (e.g. Bugs, etc.) via posts (record post, user post, etc). You can access the Bugs record view by clicking the bug's name referenced in the post. You can also preview the bug record's detail directly from the activity stream by clicking the Preview button to the right of the post. For more information on viewing records via the activity stream, please refer to the Activity Streams Documentation.



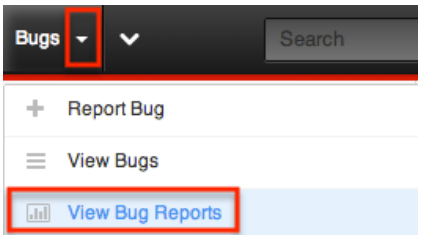

## Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding bugs and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the bug report's record view by clicking the bug's subject in the report results. Please note that you can only directly access bug record views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation.




In addition to navigating to the Reports module and finding or building relevant reports, you can use the Bugs module tab's View Bug Reports option to see all bug-based reports to which you have access.




Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

## Searching Bugs

The Bugs list view includes a module search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Bugs list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %smith). This will pull up any record that has the word "smith" in the name, regardless of how it starts or ends.

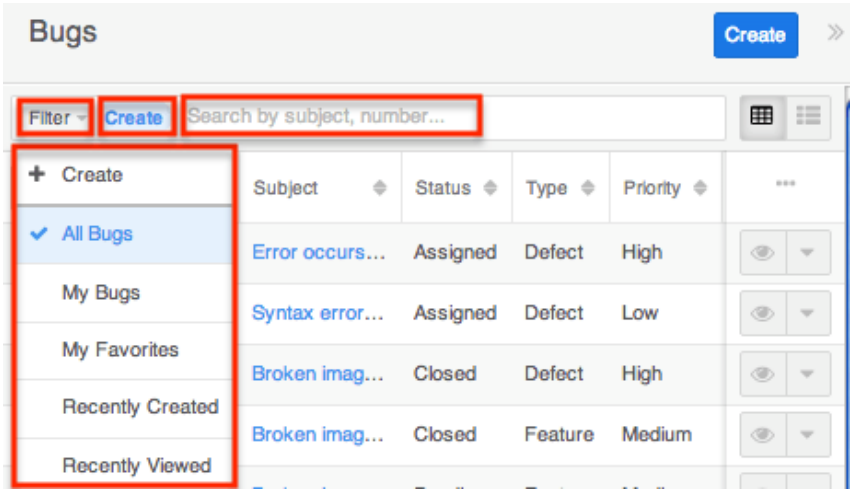
For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

### Module Search

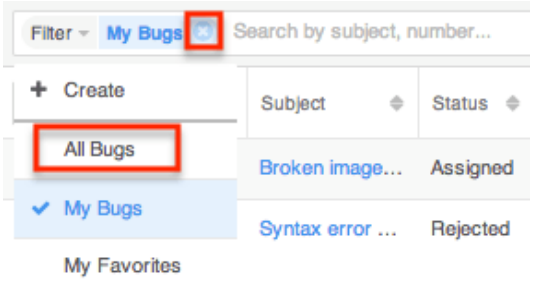
Module search enables users to easily search by bug number within the Bugs module and pull up matching records in the list view. The search also provides a Filter option which can be used in combination with the open Search box to narrow your search further using the available options as follows:

- Create : Create a new custom filter which you can use to filter your search
  - Note: You can also click "Create" to the right of the Filter option.
- All Bugs : Returns all records in the module to which you have access
- My Bugs : Returns only records assigned to you
- My Favorites : Returns only records you have marked as favorites
- Recently Created : Returns only records you created in the module within the

last 7 days
- Recently Viewed : Returns only records you have viewed in the module within the last 7 days




When you choose a filter, Sugar will return bugs which match both the selected filter and any name provided in the "Search by subject, number..." bar in the filtered list view results. For example, if you select "My Bugs" in the Filter options and enter a bug name, Sugar will only return bug records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search bar. To see all bug records to which you have access, simply select the All Bugs option in the filter and remove any text from the search bar. You can also click the Clear icon within the selected filter option (e.g. My Bugs) in the Search bar to clear the filter and pull up all list view search results. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.




Please note that you will only be able to see bug records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles management documentation in the Administration guide. Administrators can configure what fields appear on the Bugs Module Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

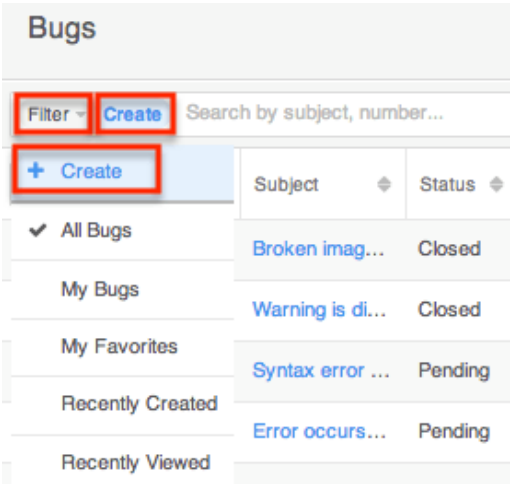
Creating a Filter

Users can also create new filters via the Create option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the Bugs list view. You have the option to add multiple fields to your new filter by clicking the Plus button to the right of the filter selection dropdown lists and set select operators along with their value(s). A filter's criteria need to be true for a record in order for it to appear in the list view search result. Additionally, filters with no specified values may be saved as a custom filter to act as a filter template when a user often searches using the same fields but with varying values. Please note that only fields you have view access for will appear in the Filter list when creating a search filter.

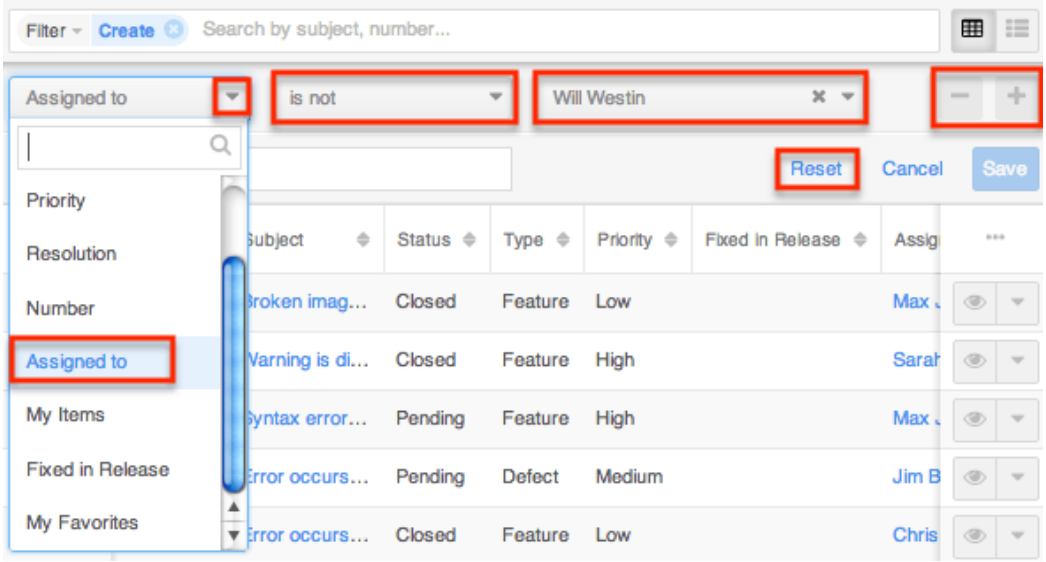
When you run a search using a created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away

The following steps cover creating a new Assigned to filter as an example:

1. Click the Filter option on the Bugs search bar then select "Create".
    - You can also click "Create" to the right of the Filter option.




2. Select the field you wish to add to your filter as well as the condition and matching criteria.
    - Note: Only fields you have view access for will be available to add in the Filter list.
3. To add additional fields to the new filter, click the Plus button to the right of the filter.
    - To remove fields from the new filter, click the Minus button to the right of the filter.
    - To clear any filter values (e.g. Will Westin), simply click the "x" to the right of the value or select "Reset" to the left of the Save button.

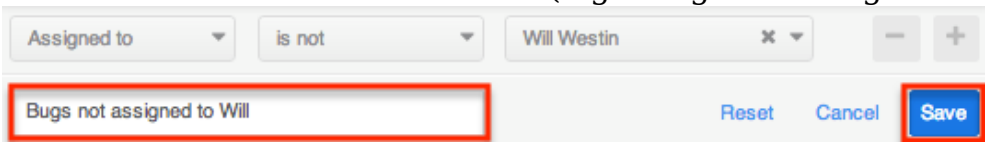



The list view will automatically display results matching your filters as you create and modify the criteria.

### Saving a Filter

Saving a filter will preserve the chosen fields as well as the condition(s) of the matching value(s). Additionally, it will allow users to easily select previously created and saved filters from the Filter options.

The following steps cover saving a new search by Name filter as an example:

1. Create a new filter to perform a search on your desired fields.
2. Enter in a name for the new filter (e.g. "Bugs not assigned to Will").


3. Click "Save" to add this filter to the module's Filter options.

## Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search may be used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.




To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the Search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

## Bugs List View

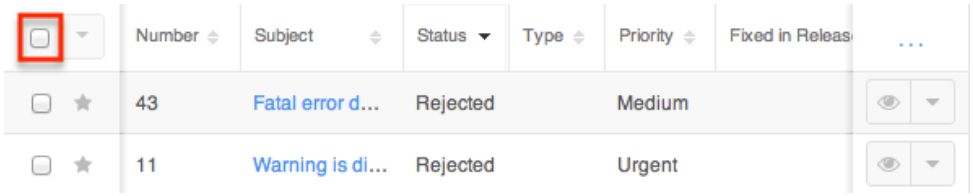
The Bugs list view displays all bug reports meeting the current search criteria and to which your user has access. You can view the basic details of each bug within the field columns. Please note that you will only be able to see bug records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles management documentation in the Administration guide.

Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

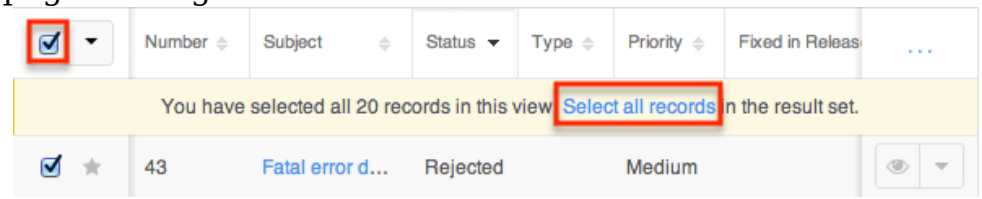
### Checkbox Selection

You can perform several actions on bug reports directly from the list view by first selecting the desired records. To select individual bug reports on the Bugs list view, mark the checkbox on the left of each row. To select or deselect multiple bug reports on the list view, use the options in the checkbox dropdown menu:

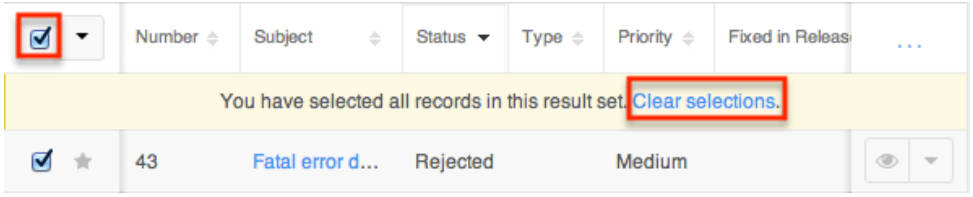
- Select This Page : Selects all records shown on the current page of bug results.




- Select all records : Selects all records in the current search results across all pages of bug results.

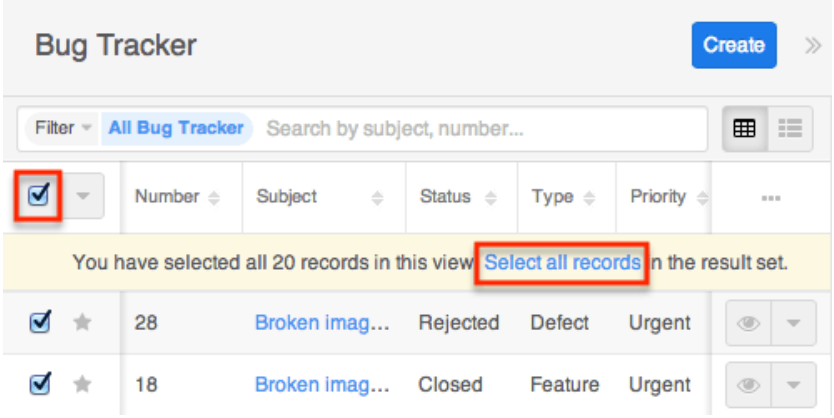



- Clear selections : Deselects all records that are currently selected.

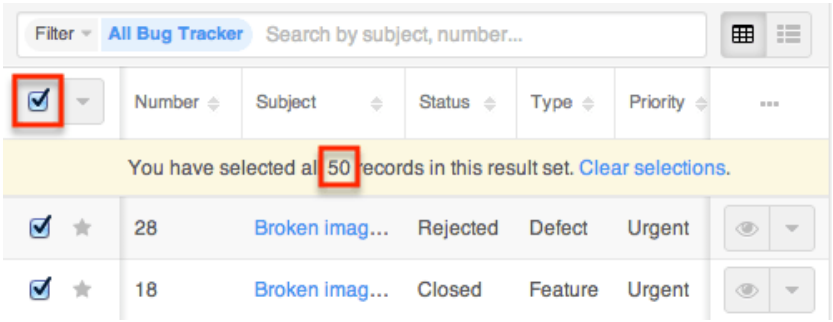



## Total Record Count

You can view the total record count on the Bugs list view by selecting all records displayed on the current set of list view results. Once the records are selected, a dialog will appear allowing you to select all records in the results set.

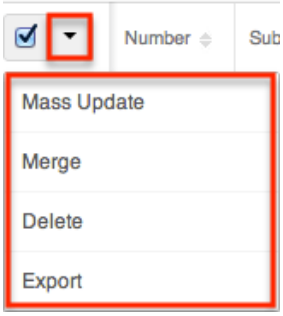



The total count of all records on the list view result set will appear in the dialog.




## Mass Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.



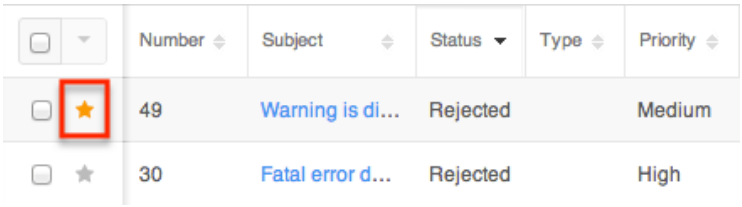

The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Mass Update | Mass update one or more but reports at a time |
| Delete | Delete one or more bug reports at a time |
| Merge | Merge two or more duplicate bug reports |
| Export | Export one or more bug reports to a CSV file |
| Recalculate Values | (Available in certain circumstances) Updates calculated values to reflect changes to calculated fields made in Studio |

## Favorite Designation

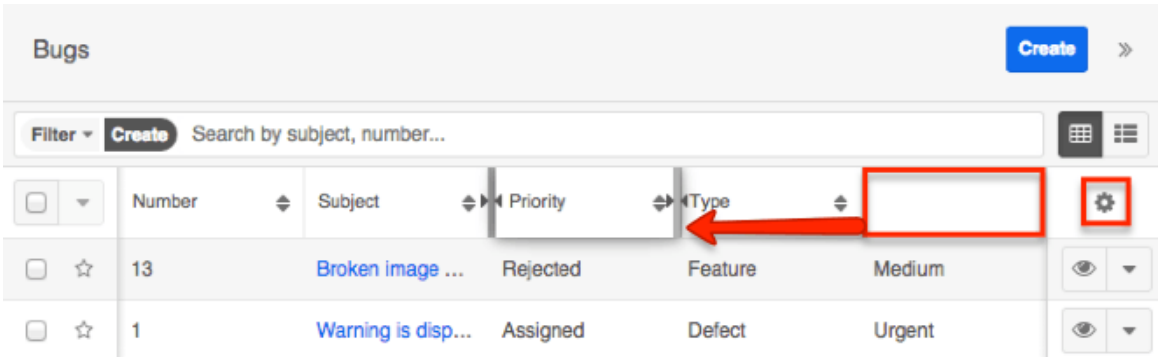
Users have the option to mark bug reports as favorites via the list view as well as

the record view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Bugs module tab. In the Bugs list view, the star on the left of each bug's row is yellow once marked to indicate a favorite bug. For more information on how to mark records as favorites, please refer to the Favoriting Bugs section of this documentation.




## Column Reordering

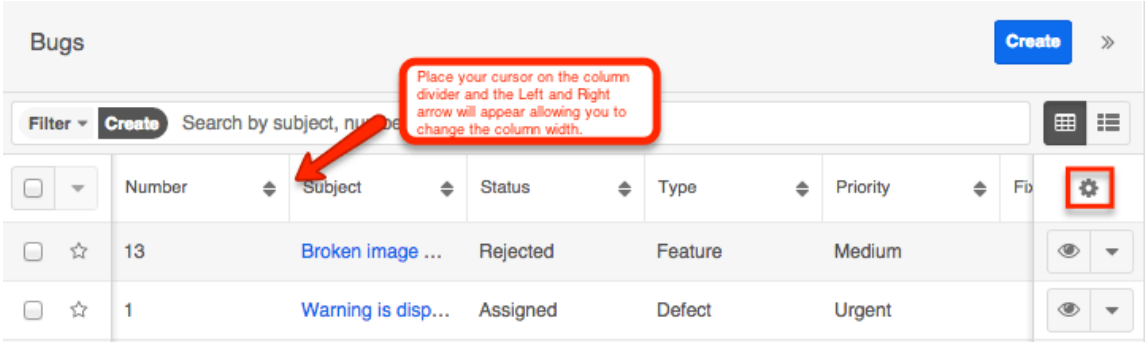
List view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the default column order.




## Column Resizing

Users can easily adjust the size of columns in the Bugs list view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the current list view is different from the default column width. Changes to the column width made by administrators in Studio are

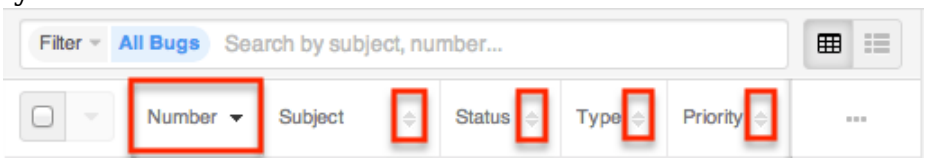
only respected if the user has not resized the specific column in the list view. The column size set by the user will supersede the default column width configured in Studio until the user resets the list view back to the default widths.




## Column Sorting

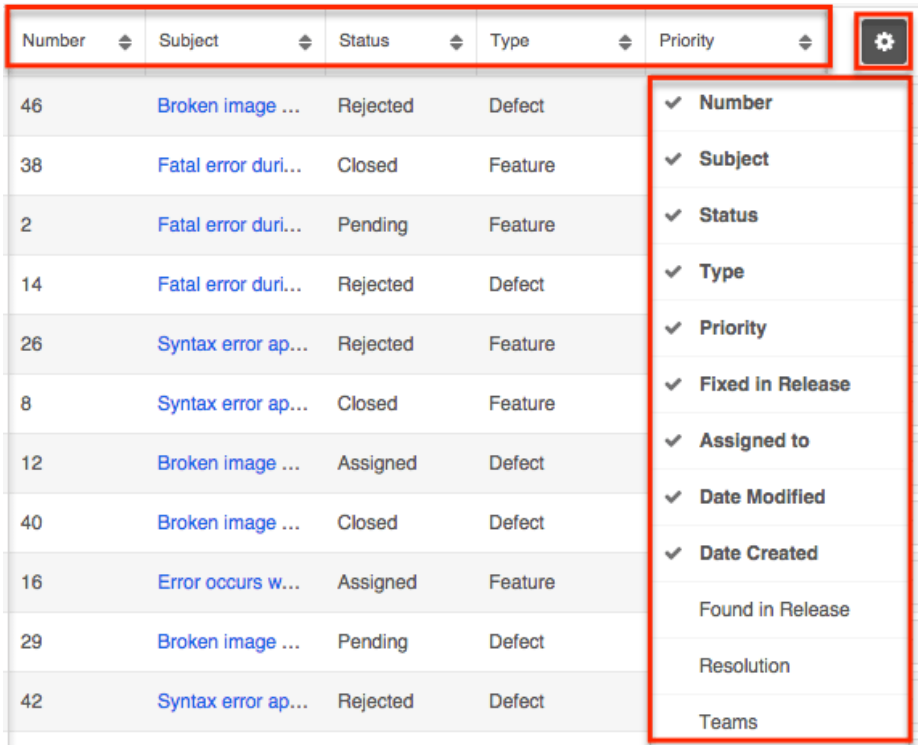
List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows.

Note: List views may only be sorted by one column at a time and cannot be sorted by custom relate fields.



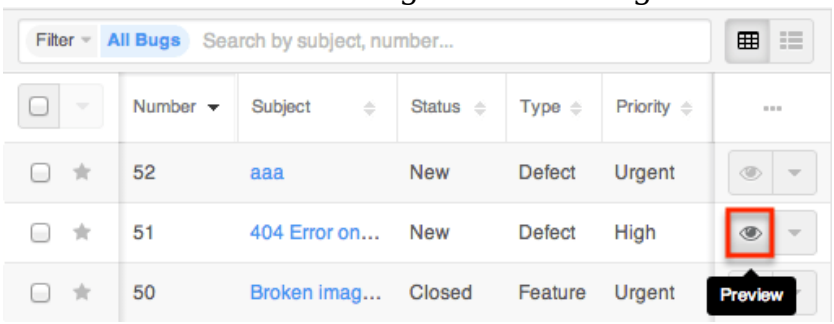

## Column Selection

Sugar gives users the ability to personalize the list view by specifying which fields they want to be displayed in the list view. You can click the Column Selection icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column on your list view. Please note that administrators have the ability to configure what fields are available to display in the list view via Admin > Studio. For more information on configuring fields to display in the list view, please refer to the Studio documentation in the Administration guide.

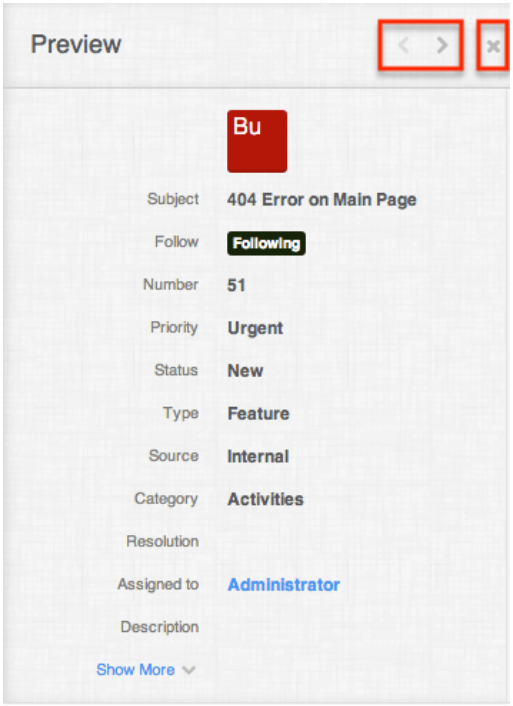



## Preview

Users can view a record's details directly from the Bugs list view by clicking the Preview icon to the far right of each bug's row.

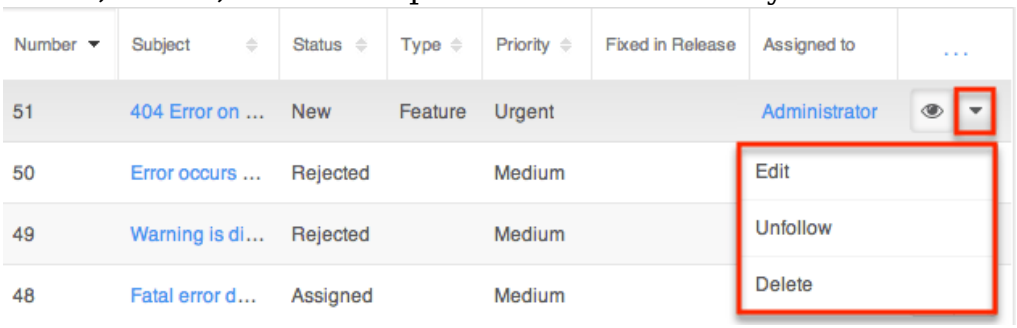



The record's data will display to the right of the list view providing key information regarding the record as well as the related activity stream information. On the upper right of the preview pane, there is a Left and Right arrow button that allows you to scroll through the list view's current search results by previewing the next or previous record. To close the preview, simply click the "X" on the upper right of the preview pane.




## Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to edit, follow, or delete specific records directly from the list view.

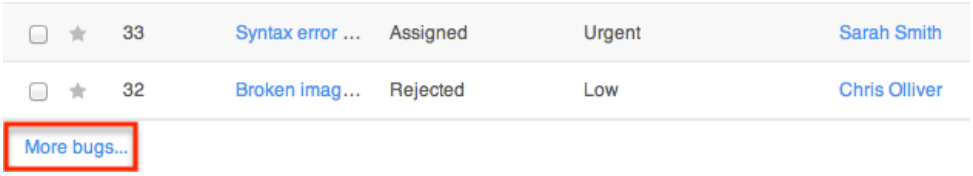



The options in the Record Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this bug |
| Follow | Follow / Unfollow this bug |
| Delete | Delete this bug |

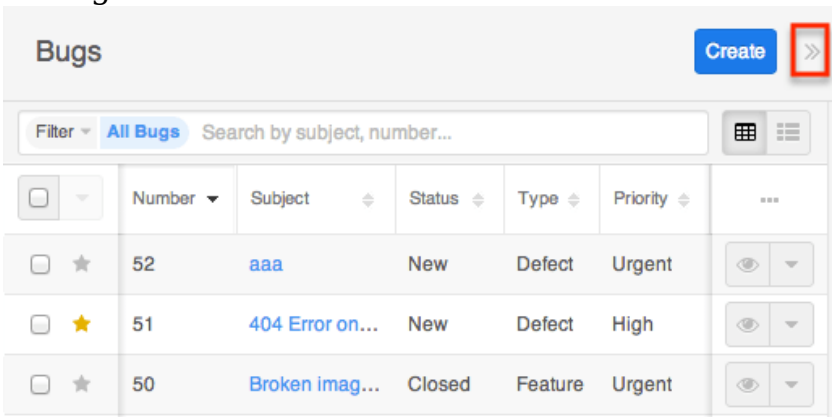
## More Bugs

The list view loads an initial number of records meeting the current search criteria with the option to show additional results at the user's request. By default, Sugar displays 20 records per list view results set, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide. To load the next set of list view results, simply click the More Bugs link at the bottom of the list view.



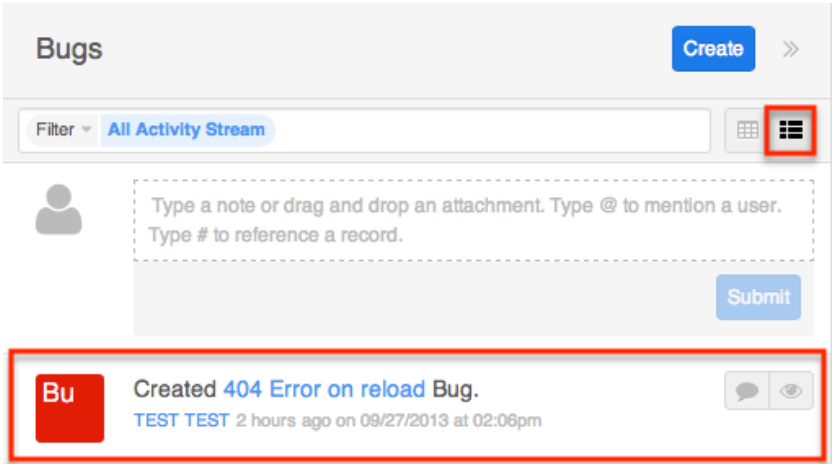

## Right Hand Side Drawer

On the upper right of the Bugs list view there is a Double arrow icon which allows users to expand the list view to the full screen width. The intelligence pane to the right of the list view will be hidden when the list view is expanded. To reduce the list view's width and reveal the intelligence pane, simply click the Double arrow icon again.




## Activity Stream

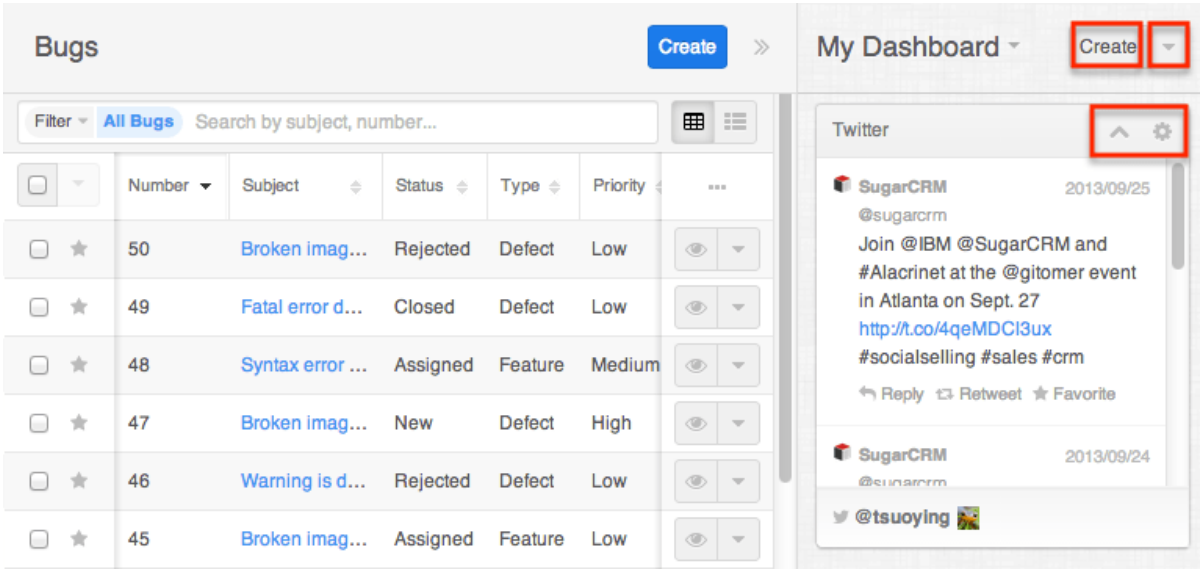
The Bug module's activity stream displays user posts made on the Bugs module and record posts relevant to an bug record. To view the module's activity stream simply click the Activity Stream button to the right of the list view's search bar. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts using the comment button to the far right of each post. You can also preview the record referenced in record posts by clicking the Preview button to the right of each post. The activity stream can be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box and selecting the desired message type.




## Intelligence Pane

An intelligence pane displays to the right of the Bugs list view and provides users with valuable record information via various dashlets. The Help dashboard normally displays by default along with the List View Help dashlet and Learning Resources dashlet. The List View Help dashlet provides users with a brief introduction to the module along with a link (e.g. Bugs documentation) to the corresponding documentation in the Application guide. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may create other dashboards for use with the Bugs module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets (e.g. My Contacts, etc.) to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do no wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Bugs module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.



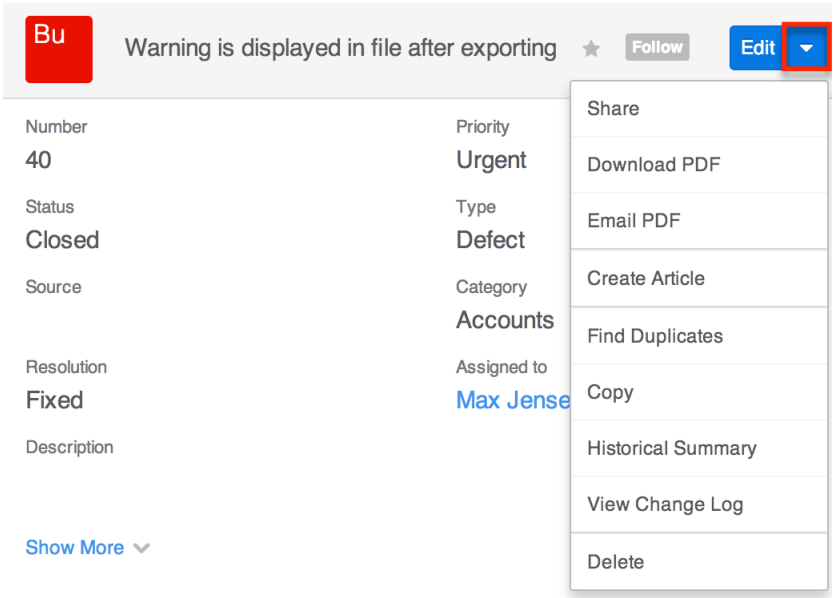

# Bugs Record View

The Bugs record view displays thorough bug report information including all bug fields which are grouped by default into the Overview and Other panels. You can also view a bug's related records (Activities, Contacts, Cases, etc.) which appear in subpanels beneath the bug fields. The record view can be reached by clicking a bug report's link from anywhere in the application including from the Bugs list view.

Please note that you will only be able to view a bug report according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Teams and Roles management documentation in the Administration guide. Users with administrator or developer access have the ability to change the record view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Actions Menu

The Actions menu on the top right of each bug's record view allows you to perform various actions on the current record.

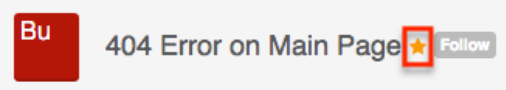



The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Edit | Edit this bug report |
| Share | Share a link to this bug report via email |
| Download PDF | Download bug information as a PDF file |
| Email PDF | Email bug information as a PDF attachment |
| Create Article | Converts information from the case to the record view of a Knowledge Base article. Please refer to the Knowledge Base documentation in the Application Guide |
| Find Duplicates | Locate potential duplicates of this bug |
| Copy | Duplicate this bug report |
| Historical Summary | View a historical summary of activities (e.g. calls, meetings, etc.) related to this bug |
| View Change Log | View a record of changes to this bug report |
| Delete | Delete this bug report |

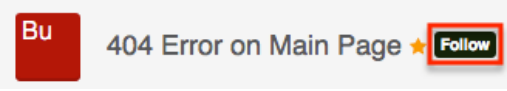
## Favorite Designation

Users have the option to mark bug records as a favorite via the record view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Bugs module tab. In the Bugs record view, the star on the right of the bug's subject is yellow once marked to indicate a favorite bug. For more information on how to mark records as favorites, please refer to the Favoriting Bugs section of this documentation.



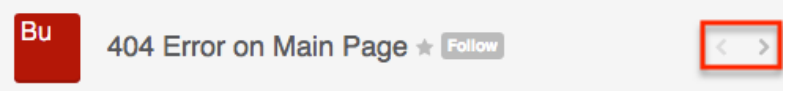

## Following Designation

Users also have the option to follow bug records via the record view or list view. This allows users to view record posts from followed bugs on their Home page and Bugs list view activity stream. Each user can personalize their activity streams by viewing posts for records that are most important to them. From the record view, users may follow or unfollow bugs to which they have access using the Follow button to the right of the bug's name. For more information on how to mark records to follow via the list view, please refer to the Record Actions Menu section of this documentation. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. If you wish to stop following a specific bug record, click the Following button to revert it to gray. Should a user lose access to a record in Sugar, they will automatically stop following that record.




## Next or Previous Record

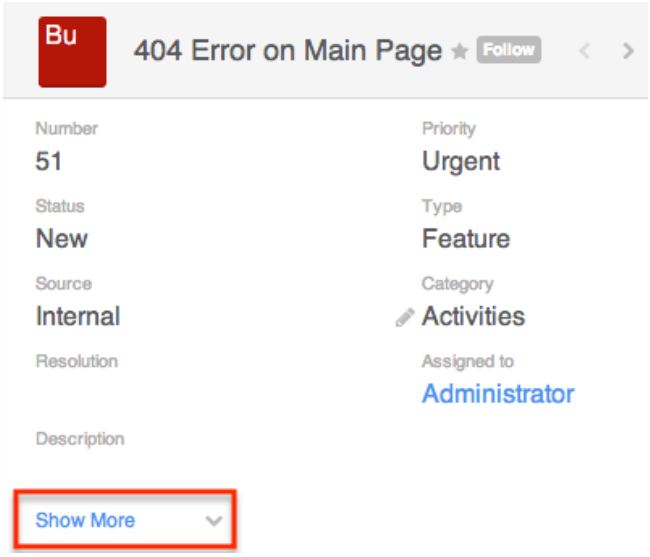
On the upper right of the Bugs record view, there are two buttons that allow you to page through each bug in the Bugs list view's current search results. Clicking the Previous button displays the previous bug report of the current search results while clicking the Next button displays the next bug report of the current search results. The text in between shows which bug result you are currently viewing within the total number of current results.




## Show More

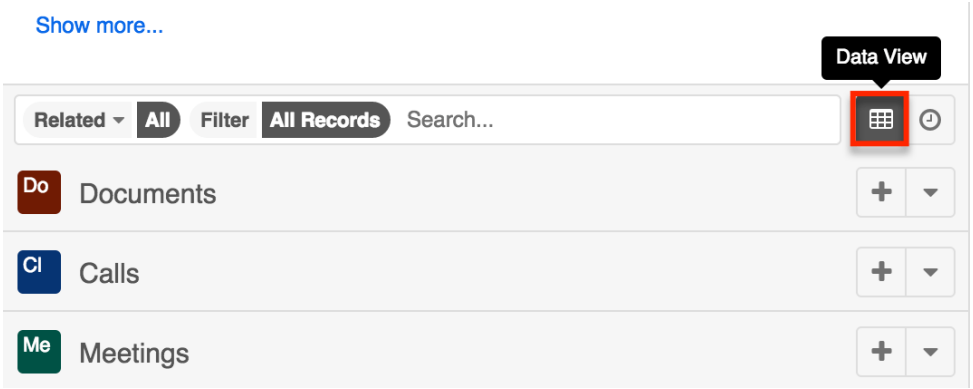
The Bugs record view typically display a few key fields (e.g. number, priority, type,

category, etc.) on the business card panel with the option to view more fields by clicking the Show More link on the bottom left. Please note that administrators can configure what fields appear on the business card panel via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.




## Subpanels

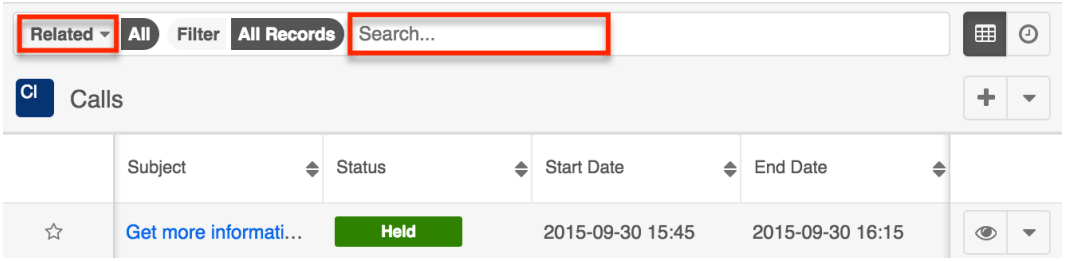
Beneath a bug report's fields are subpanels containing related records from various modules, communication history regarding the bug, documents and screen captures of the defect, and what customer cases are instances of the bug.



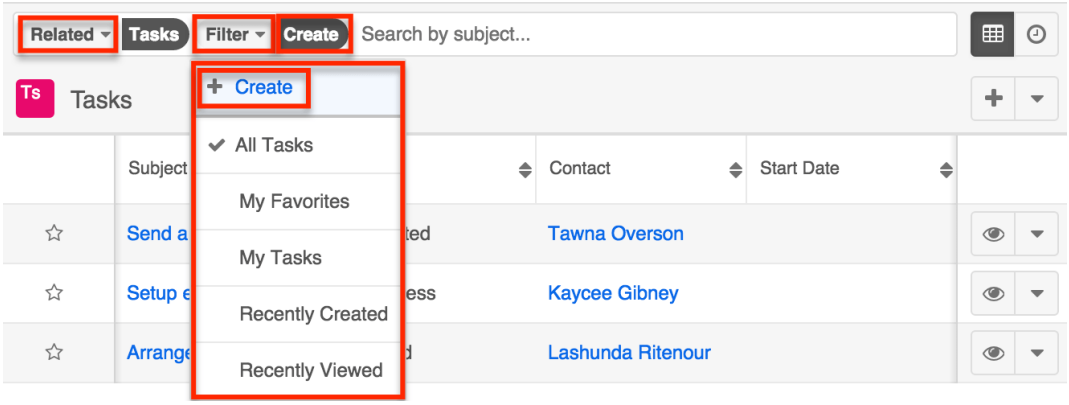

### Filter Options

While in Data View, all of the bug record's related records will be displayed beneath the bug record's fields. Users have the ability to search for records which appear in the subpanels as well as filter the view to only display a specific module (e.g. Contacts, Cases, etc.). To locate a record by name, enter the keyword into the Search bar, and the subpanel(s) with the matching record(s) will appear below. To filter, simply click the Related option to the far left of the Search bar and select the

module whose subpanel you wish to view. Filter and search may be combined to only display matching records within a selected module. To see all subpanels to which you have access, simply select "All" in the Related options and remove any text from the search bar. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the page. Returning to the page will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.

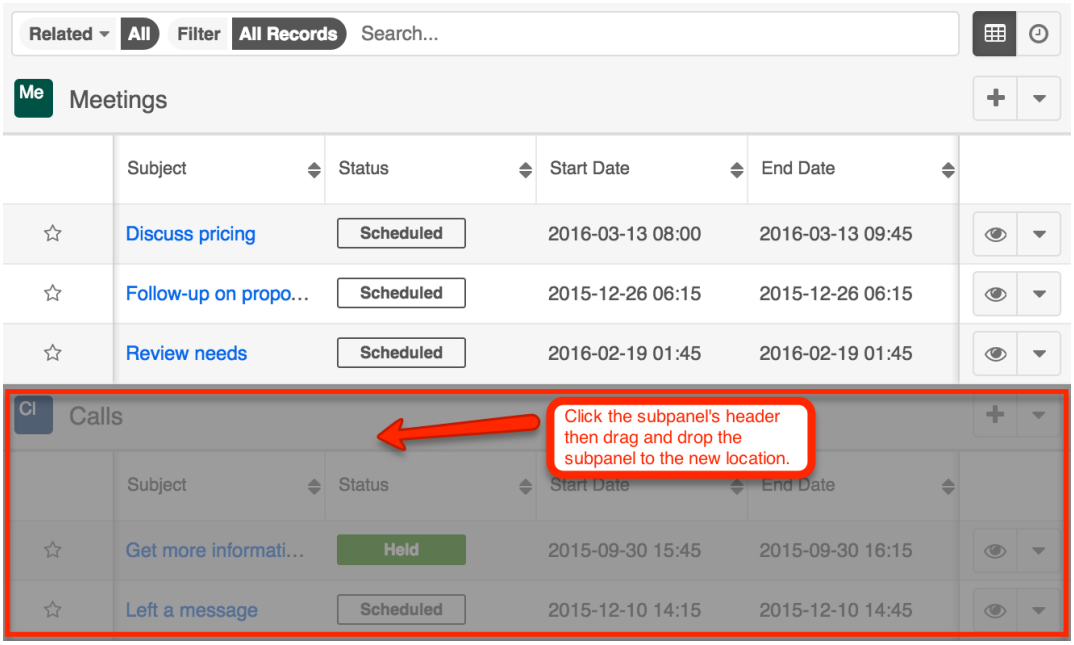



When a Sidecar module (e.g. Contacts, Accounts, Cases, etc.) is selected from the Related options, you have the option to filter the related subpanels further using one of the available options (e.g. My Favorites, Recently Created, etc.). Please note that you can also create custom filters for related Sidecar modules. Once the related module (e.g. Contacts) is selected, either click the Filter option and select "Create" or click "Create" to the right of the Filter option. For more information on creating related records filter, please refer to the Creating a Related Records Filter section of the Search documentation.




## Reordering Subpanels

Users can easily move subpanels to a new location on the record view by dragging and dropping the subpanel's header. The new subpanel order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared.




Related Module Subpanels

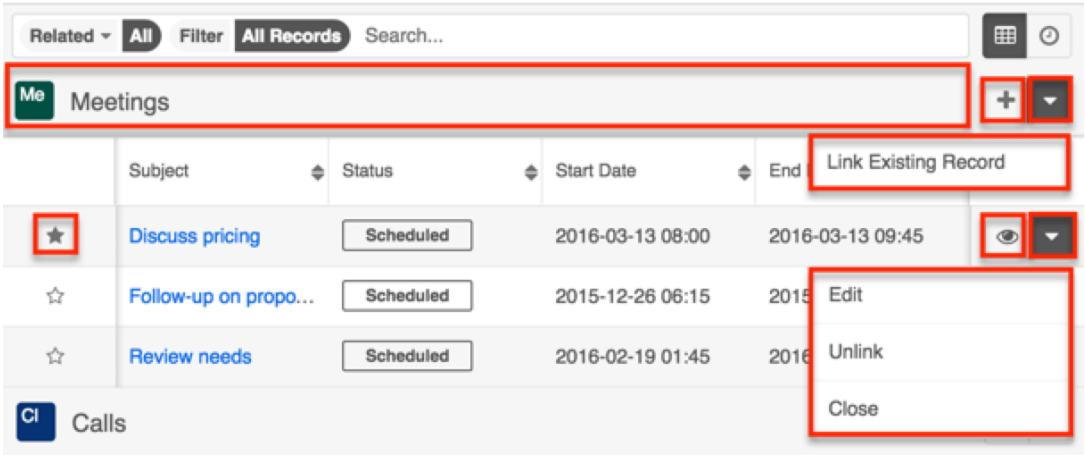
The most common type of subpanels displayed on a bug's record view contains the bug's related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. Out of the box, the Bugs module does not include any relationships to other modules that would cause a related record to be displayed in the field listing. However, for example, a bug may be related to multiple cases. This means that the cases will be displayed in a subpanel beneath the fields listing.

Users with administrator or developer access have the ability to change the fields (e.g. Subject, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.

Related record subpanels allow the following operations to be performed:

- To view the details of a related record, click the record's name in the subpanel to open it in record view.
- To relate an existing record to the bug, choose "Link Existing Record" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the bug, click the Plus button to the left of the Actions menu, then complete the record view layout and click "Save".
- To preview the related record, click the Preview icon to the far right of the record's row in the subpanel.

- To inline edit the record directly from the subpanel, choose "Edit" from the Actions menu on the far right of the record's row and click "Save" to preserve the change.
- To delete the bug's relationship to a record, choose "Unlink" from the Actions menu on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To mark the record as a favorite, click the star icon to the left of the desired record's row.
- To collapse or expand the subpanel, click anywhere on the subpanel's header.
- To change the column size in the subpanel, place your cursor on the column divider and when the Left and Right arrow appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.



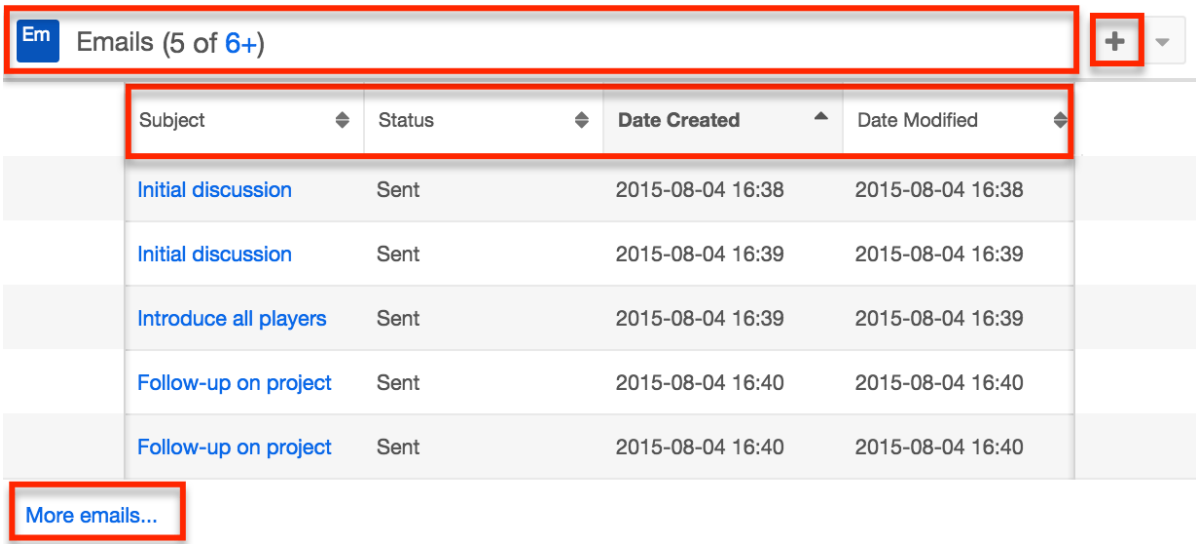

## Emails Subpanel

The Emails subpanel in the Bugs module displays both emails implicitly and explicitly related to the account record. Emails in Sugar are implicitly related to records in Sugar that match an email address in the From, To, or Cc fields in the email. This implicit relationship is made for emails sent from Sugar as well as any email imported into Sugar via Inbound email accounts or email archiving. While composing an email or relating an existing email to a record, users have the ability to set an explicit relationship via the flex relate field by Relating Emails. This allows the email to be explicitly related to a single record from one of many modules.

The Emails subpanel allows the following functions to be performed:

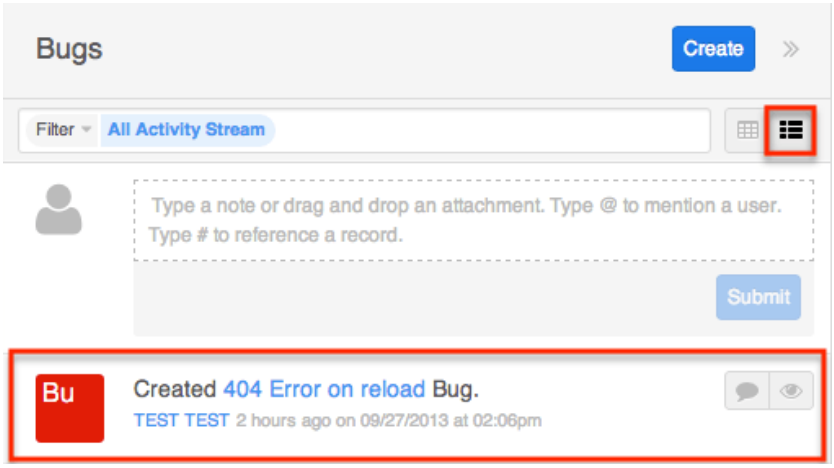
- To view the details of an email, click the subject in the subpanel to open it in detail view.
- To collapse or expand the subpanel, click anywhere on the subpanel's header.

- Click "+" to create a new email that will have an implicit relationship with this record.
- Sort the emails by Subject, Status, Date Created, Date Modified, or Assigned User.
- Click "More emails" to see any additional emails hidden by the default view.
- To change the column size in the subpanel, place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. For more information on resizing columns, please refer to the Column Resizing section of this documentation.
    - Note: The subpanel column width will not be preserved when you navigate away from the page.




## Activity Stream

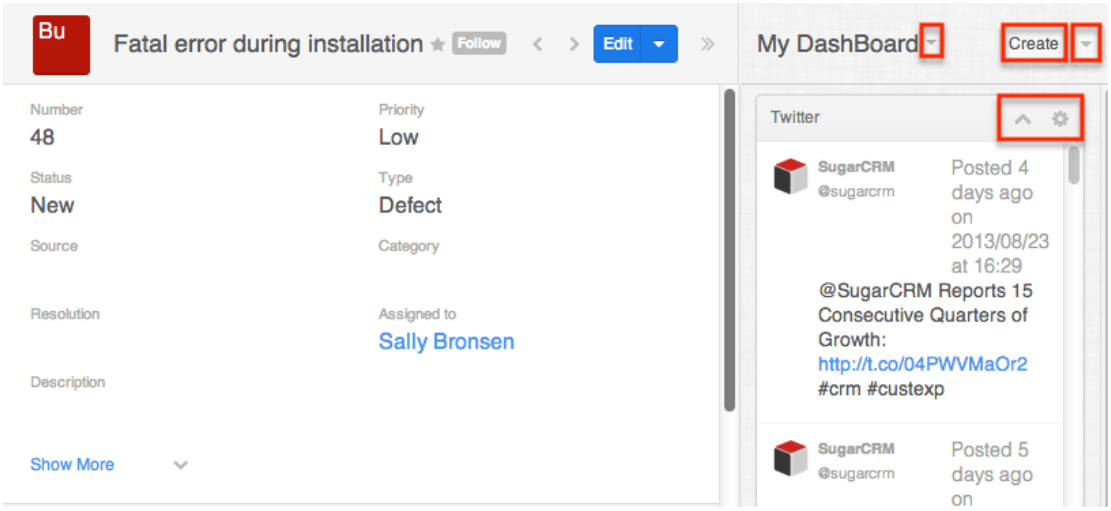
Record view's activity stream displays user posts and record posts specific to the individual bug record. To view the record's activity stream, simply click the Activity Stream button below the bug's fields. Users can view all posts in the record view's activity stream even if they do not follow the record in Sugar. Please note that you must follow the record if you wish to view the record view posts via the Home page or List View activity stream. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts by clicking the Comment button to the far right of each post, entering in your comment, then clicking "Reply". You can also preview the record referenced in the record post by clicking the Preview button. The activity stream can also be filtered to only display certain messages (e.g. Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box then selecting the desired message type.




## Intelligence Pane

An intelligence pane displays to the right of the bug's record view and provides users with valuable information specific to the bug. The Help Dashboard normally displays by default along with the Record View Help dashlet and Learning Resources dashlet. The Record View Help dashlet provides users with a brief introduction to the module along with some instructions to help users utilize and navigate around the record view. A link to the corresponding documentation (e.g. Bugs documentation) in the Application guide is also provided within the Help dashlet. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the Intelligence Pane documentation. You can access the My Dashboard, which will display some stock dashlets (e.g. Planned Activities dashlet, History dashlet , etc.) by clicking the triangle to the right of "Help Dashboard" and selecting "My Dashboard". Users may choose to view any of their dashboards using the triangle to the right of the current dashboard's name and may create other dashboards for use with the Bugs module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do not wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Bugs module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the Intelligence Pane documentation.




# Editing Bugs

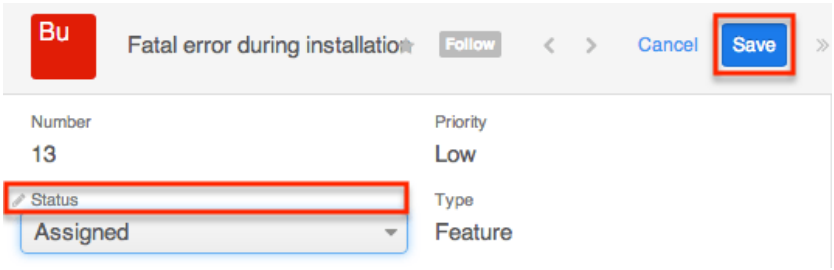
Bugs may be edited at any time to update or add information to the record. You can make changes to existing bug records via the Bugs record view and quick create forms. Record view is available within the Bugs module and includes all of the Bugs fields you should need.

Please note that your ability to edit bug reports in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure both the Bugs record view and quick create via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

## Editing Inline Via Record View

Users can edit individual fields on a Bug's record view without entering the full edit mode by clicking the field name. Fields which are available for inline editing will display a pencil icon when hovering on the field name or value. This will allow users to type or select a new value. Click "Save" to preserve the changes made to the field.

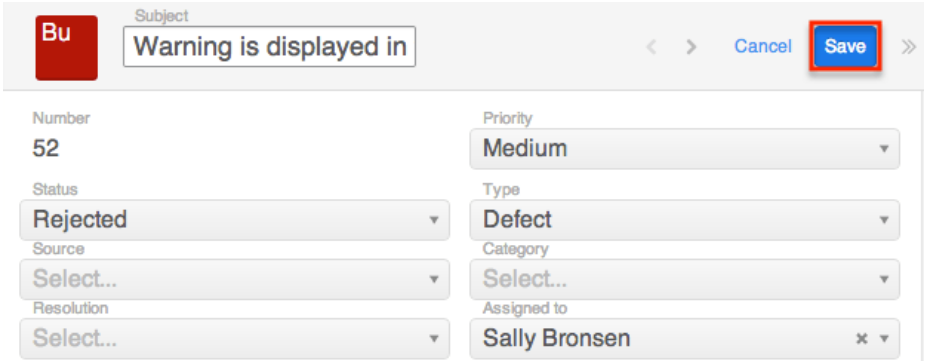



## Editing Via Record View

You can edit bugs via the Record View by clicking the Edit button to the right of the bug subject line.

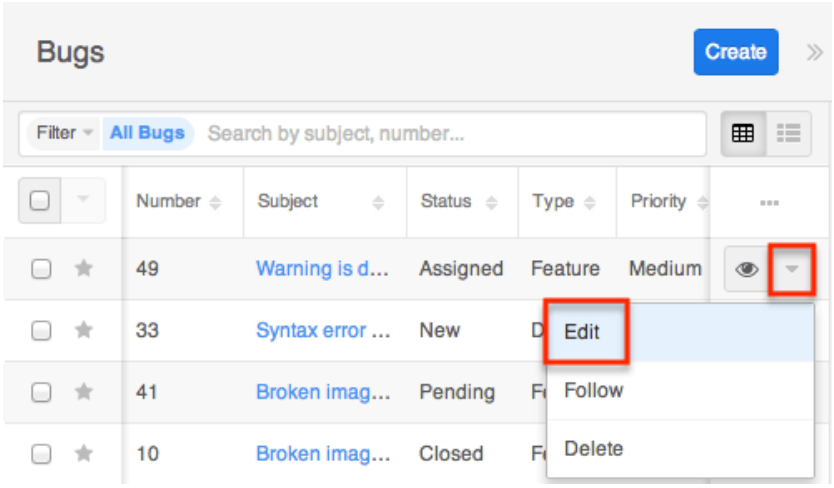



Once the record view layout is open, update the necessary fields, then click "Save" to preserve the changes made.

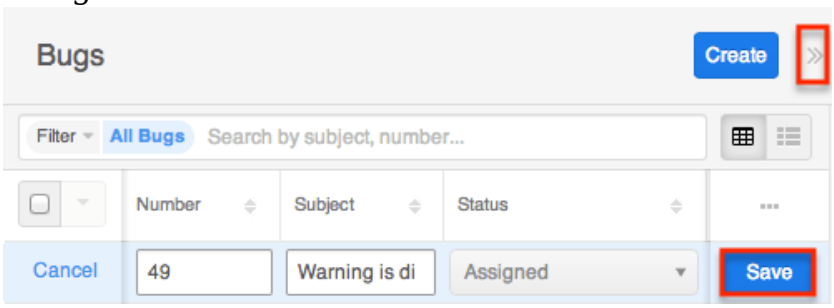



## Editing Inline Via List View

You can edit bugs via the list view by clicking the triangle icon to the right of each bug's preview and choose "Edit".



The bug will become editable, inline as a shortened version of the record view layout. Click the double arrows to the right of the "Create" button to expand the editing window. Update the necessary fields, then click "Save" to preserve the changes.




Note: Text area fields are not inline editable from list views.

## Deleting Bugs

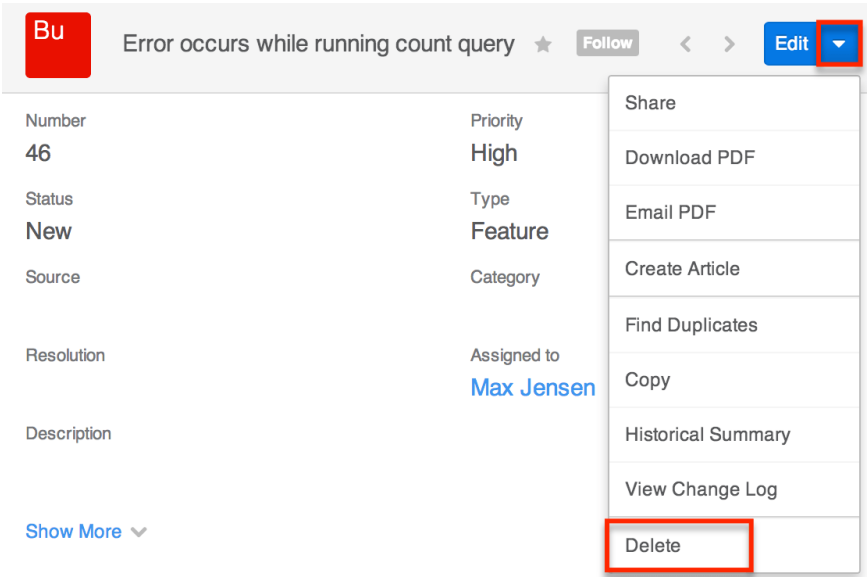
If a bug report is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Bugs record view or list view. Deleting via the record view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting bug records will not delete the related records and will only remove the relationship.

Please note that your ability to delete bugs in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

### Deleting Via Record View

Use the following steps to delete a bug report via the record view:

1. Navigate to a bug report's record view.
2. Select "Delete" from the Actions menu.

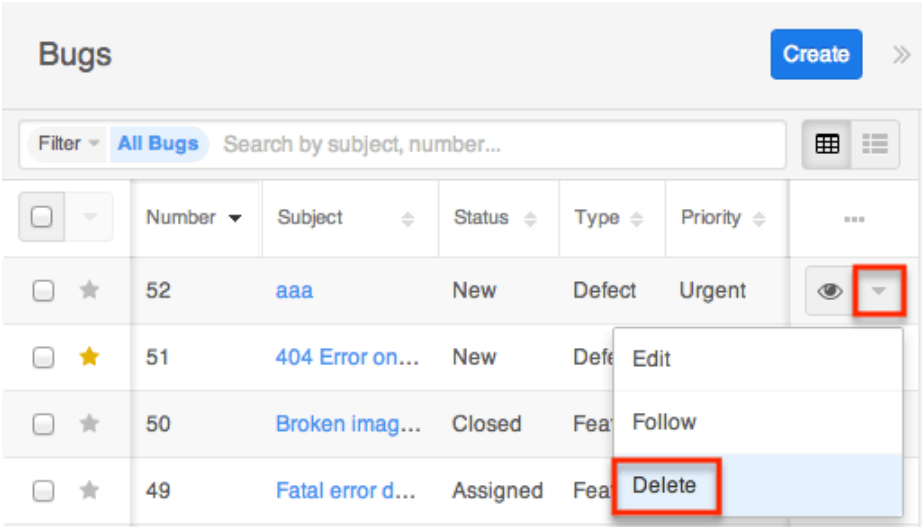



3. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

## Deleting Via List View

Use the following steps to delete a specific bugs via the list view:

1. Navigate to the Bugs list view by clicking the Bugs module tab.
2. Use the Module Search to find the Bug records you wish to delete.
3. Click the triangle to the right of the preview button of the bug you want to delete.

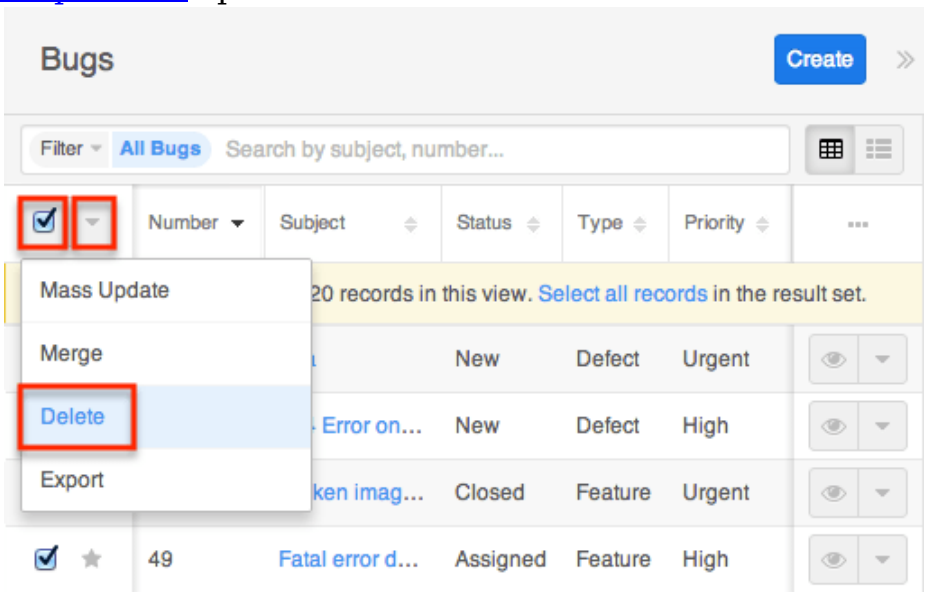



4. Choose "Delete" from the Actions menu.

## Mass Deleting Via List View

Use the following steps to delete one or more bugs via the list view:

1. Navigate to the Bugs list view by clicking the Bugs module tab.
2. Use the Module Search to find the Bug records you wish to delete.
3. Select the desired bug records individually or using the Checkbox Dropdown's options then choose "Delete" from the Actions menu.




4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

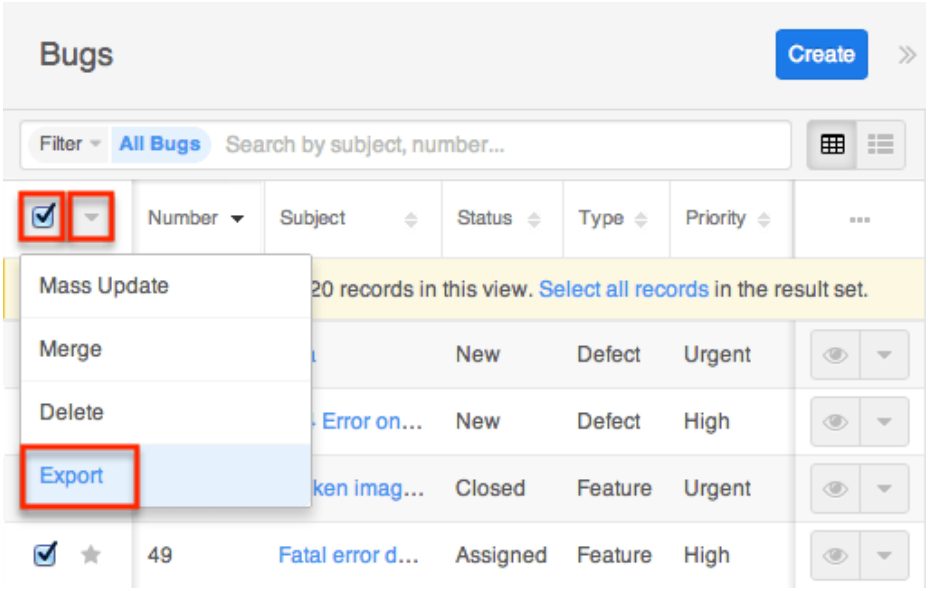
You can also use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to delete more than 1000 records or delete a specific group of records on the list view, please use the in module search to perform the deletions in smaller batches.

## Exporting Bugs

Sugar's Export option allows users to download all fields for the selected bugs to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Bug Report data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered bugs back into Sugar. For more information on updating existing records via import, please refer to the Import documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of bug reports. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Bugs may be exported from the Bugs list view by selecting "Export" from the

Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for bugs and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.




Please note that your ability to export bugs from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

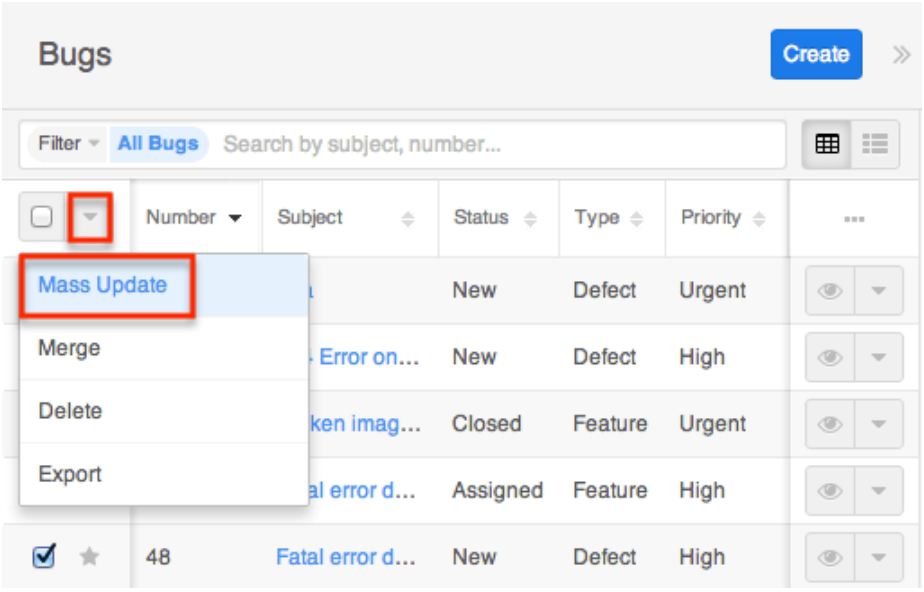
## Mass Updating Bugs

Mass Updating allows users to make the same change to multiple bug reports at once from the Bugs list view. Users with administrator or developer level access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide.You can use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to update more than 1000 records or update a specific group of records on the list view, please use the filter option in module search to perform the updates in smaller batches.

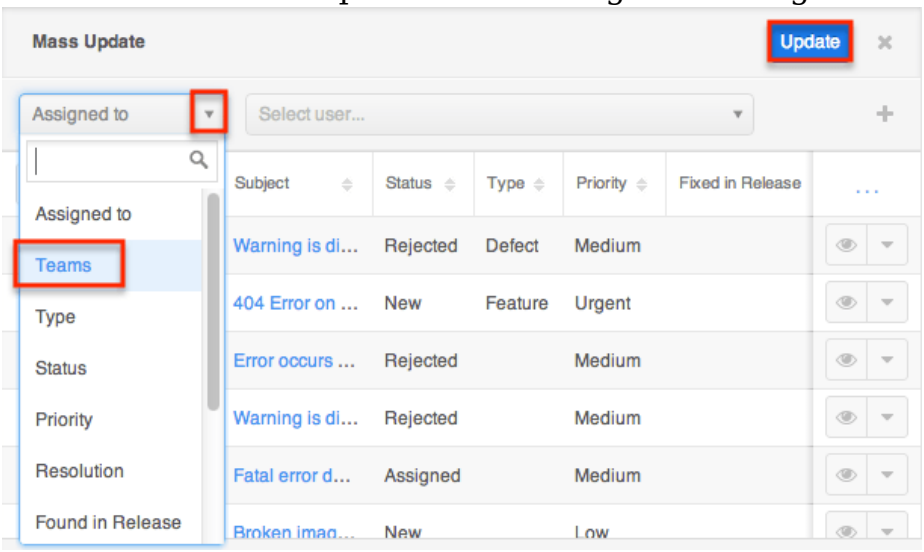
Please note that your ability to mass update bugs may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

Use the following steps to mass update bug reports from the list view:

1. Navigate to the Bugs list view by clicking the Bugs module tab.
2. Use the Module Search to identify Bug records you wish to modify.
3. Select the desired bugs individually or using the Checkbox Dropdown's options then choose "Mass Update" from the Actions menu.




4. The Mass Update panel will appear below the search bar. Set values for the field(s) you wish to alter.
   - To add additional fields for mass update, click the Plus icon to the right of the dropdown list.
   - Note: For the Teams field, mark "Append Team(s)" to add the teams specified here to any existing team assignments. Not marking the checkbox will replace the existing team assignment with the new one.




5. Click "Update" to save the changes to all of the currently selected bug reports.

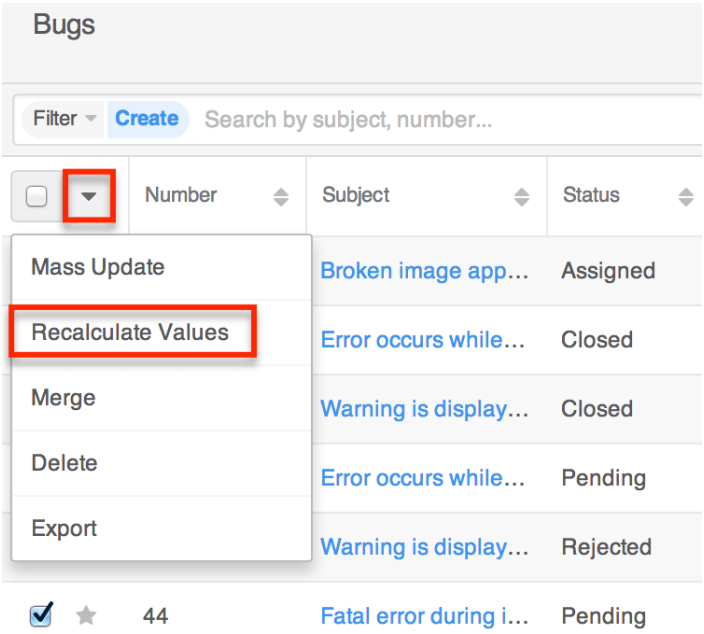
## Recalculating Calculated Values

This feature allows calculated values to be recalculated following the addition or alteration of a calculated field in Studio. For more information on calculated fields, please refer to the Studio documentation in the Administration guide. Sugar allows you to select up to 1000 records at a time for recalculating values. If you desire to recalculate values for more than 1000 records, you will need to perform the recalculation in several batches.

Note: This action will not appear unless the user is an Admin or has developer-level access to the module and if there is at least one calculated value in that module. Please note that your ability to recalculate values may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Recalculate Values option.

The following steps cover recalculating values for records from the Bugs list view as an example:

1. Navigate to the Bugs list view by clicking the Bugs module tab.
2. Use the list view's Module Search to identify bugs you wish to update.
3. Select the desired bugs then choose "Recalculate Values" from the Actions menu.



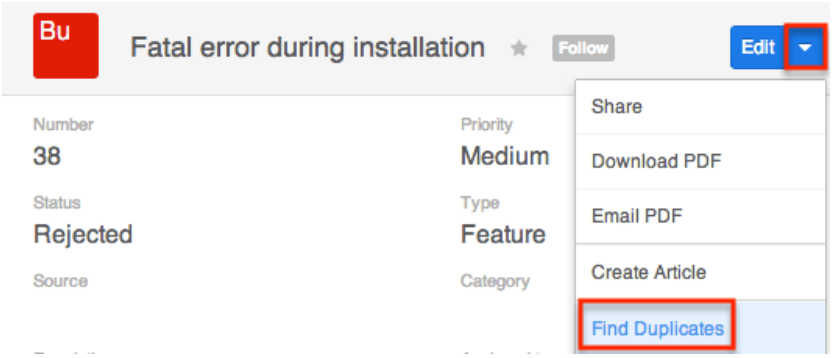

## Finding Duplicate Bugs

Between multiple users working in Sugar, importing new records, and converting leads, it is possible for duplicate bug records to be accidentally input to the system. Before creating a new bug record, a good practice is to first check that the bug does not already exist in Sugar. You can locate duplicate records for cleanup using module search from the Bugs list view. Searching for bugs with similar names or other information can turn search into a powerful, duplicates-finding tool. Sugar also provides a wizard for finding potential duplicates that is available from the Bugs record view and may be used as shown below. If duplicate bug records are detected, you can perform a merge per the Merging Bugs section of this documentation.

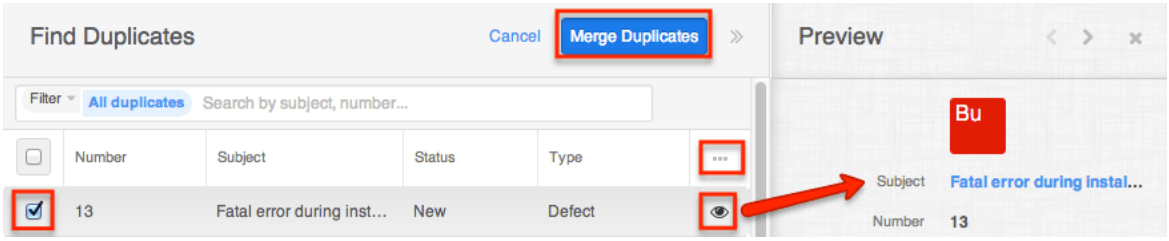
Please note that your ability to use the Find Duplicates action may be restricted by any role which prevents bug deletion. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Find Duplicates option.

Use the following steps to locate duplicate bugs using the Find Duplicates option from the Bugs record view:

1. Navigate to an bug's record view.
2. Choose "Find Duplicates" from the Actions menu.




3. Potential duplicate bug records will be listed on the Find Duplicates page. Select the duplicate record(s) you wish to merge then click "Merge Duplicates".
    - You can preview the duplicate record's details by clicking the Preview button to the far right of the records row.
    - You can search for specific records from the Bugs list view if you wish to check for more possible duplicates. For more information on performing a search, please refer to the Module Search section of this documentation.
    - You can also click the Column Selection icon above the Preview button to change the list of fields that display on the list view column headers.




Once you click "Merge Duplicates", the merging process with the current record will begin. For instructions on performing the merge that follows, please refer to Steps 3-9 of the Merging Via List View section of this documentation.

# Merging Bugs

When duplicate records are identified in Sugar, you have the option to merge two or more bugs into a single record. Once the merge is complete, the duplicate bug report(s) will be deleted, and the primary record will remain. Please note that all relationships belonging to the duplicate bugs will be merged to the primary record meaning that any cases, meetings, contacts, etc. related to the duplicate bug report(s) will automatically be related to the resulting, merged bug report.

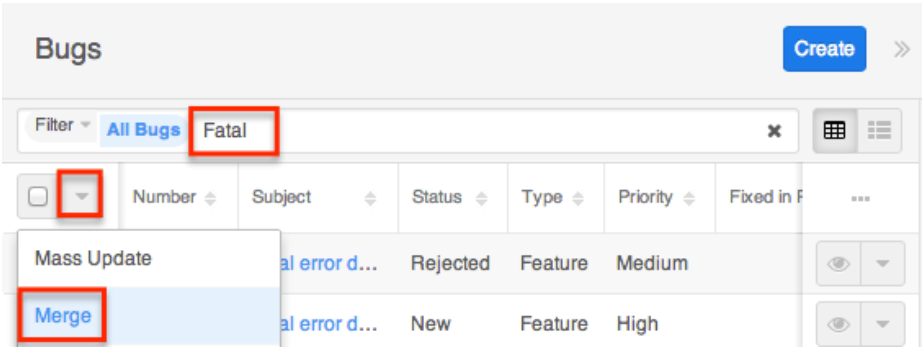
Note: Date Created, Date Modified, and Password field types are not supported when merging duplicate records in Sugar.

## Merging Via List View

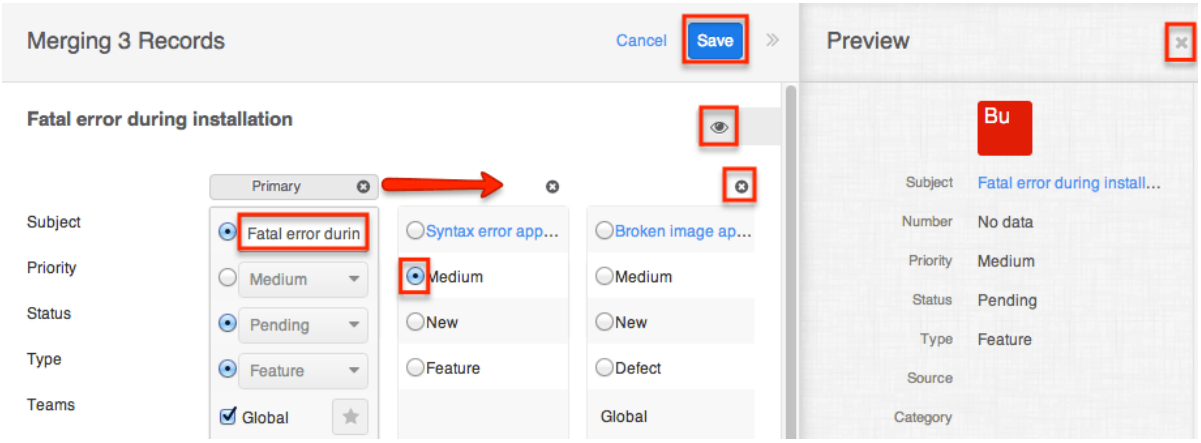
Module Search may be used to identify duplicate bugs by, for example, searching for bugs with similar names or categories. Once your search has identified duplicate bug reports, you can merge them directly from the Bugs list view.

Use the following steps to merge bugs via the list view:

1. Use the Module Search to identify duplicate bug reports.
2. Possible duplicates will be displayed in the list view. Select the duplicate record(s) that you wish to merge.
    - Please note that up to five records may be merged at once in Sugar. An error message ("Invalid number of records passed. The valid range is from 2 to 5 records.") will appear if more than five records are selected when attempting to perform a merge.




3. Select "Merge" from the Actions menu to display the Merging Records page. The primary record's field values are displayed on the left while other record's values are in columns to the right. For convenience, fields with differing values will appear on the top of the list. Saving the merge will preserve only the field values marked with the radio button into a single record.




If 3 or more records are selected to be merged, an X icon will appear at the top right of each record. Clicking the "X" will remove the record from the merge process but will not delete the record.

4. To change which record is considered the primary, drag and drop the Primary label on the top of a different column.
5. Review the field values in each column and click the radio button to the left of the value that should appear on the final record. You can also manually type or select a new value for any field as necessary.
    - Note: Fields you do not have Edit access for cannot be edited on the merging records page.
6. Preview what the final, merged record will contain as you work by clicking the eye icon to display the preview in the Intelligence Pane.
7. Click "Save" once all fields you wish to appear on the single, merged record have their radio buttons selected.
8. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Confirm" to proceed.

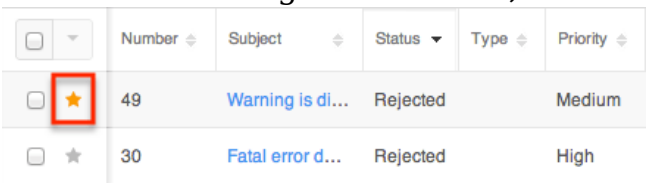
# Favoriting Bugs

Each Sugar user has the option to designate their own favorite bugs which are important or will be viewed often so that they can easily be accessed via search or from the Bugs module tab. Once records are marked as favorites, use the My Favorites filter in Module Search to retrieve your favorites or select from your most recent favorites directly from the Bugs Module Tab.

## Favoriting Via List View

Use the following steps to mark records as favorites via the Bugs list view:

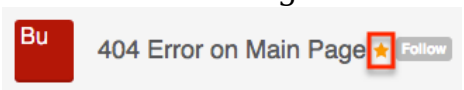
1. Navigate to the Bugs list view by clicking the Bugs module tab.
2. Use the Module Search to find the Bug reports you wish to mark as favorites.
3. Mark the star icon on the left of each desired bug's row.
4. To remove the bug as a favorite, click the star again to revert it to white.




## Favoriting Via Record View

Use the following steps to mark records as favorites via the Bugs record view:

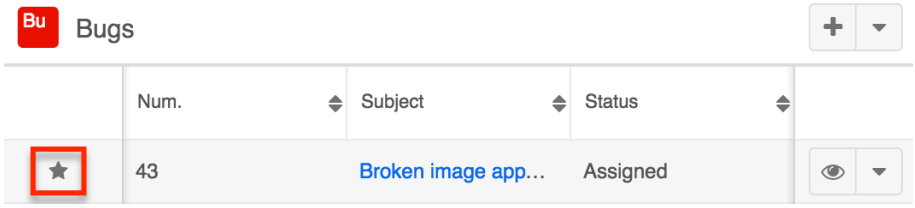
1. Navigate to a bug report's record view.
2. Click the star icon to the right of the bug's name in the upper left of the record view to designate it as a favorite.
3. To remove the bug as a favorite, click the star again to revert it to white.




## Favoriting Via Subpanel

Use the following steps to mark bug records as favorites via the subpanel in related modules:

1. Navigate to a related module's record view.
2. Click the star icon to the left of the desired record's row in the Bugs subpanel.




3. To remove the bug as a favorite, click the star again to revert it to white.

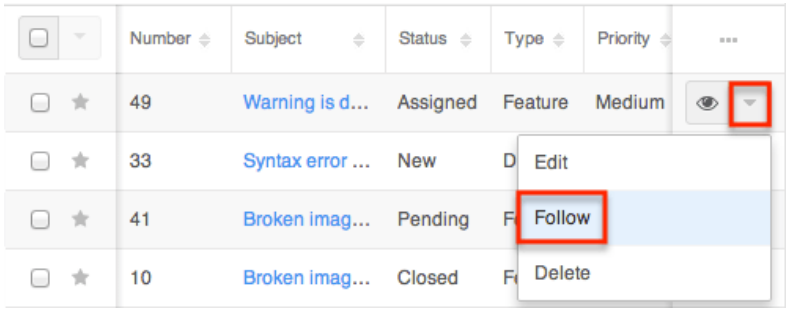
## Following Bugs

Users can also choose to follow specific bug records to which they have access to in Sugar by clicking the Follow button (If grayed out) to the right of the bug's name. This allows each user to personalize their activity streams by specifying which records' posts should appear on the activity stream displayed on their Home page and Bugs list view. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. Should a user lose access to a record in Sugar, they will automatically stop following that record.

### Following Via List View

Use the following steps to mark a record to follow via the Bug's list view:

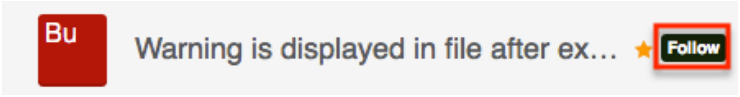
1. Navigate to the Bug's list view by clicking the Bugs module tab.
2. Use the Module Search to find the Bug records you wish to follow.
3. Click the Record Actions menu to the far right of the records row and select "Follow".



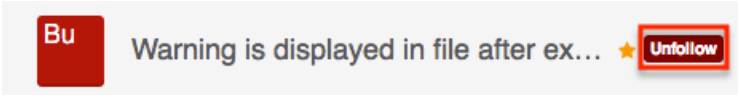

### Following Via Record View

Use the following steps to mark a record to follow via the Bug's record view:

1. Navigate to a Bug's record view.
2. Click the Follow button to the right of the Bug's name.




3. To unfollow the bug, click the Follow button again to revert it to gray.




## Create Article

You can create Knowledge Base articles relating to specific bugs and cases. This is particularly useful when the bug fix or situation will not be resolved until a later date, but a work-around currently exits.

Please note that your ability to edit bug reports in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

The record view layout opens when creating the article directly from the Knowledge Base menu and includes all of the relevant fields for your organization's articles.

- Draft : The article is still undergoing changes.
- Expired : The article is outdated.
- In Review : The article is being reviewed by the designated approver. When this status is set a notification email is sent to the Approver.
- Published : The article is finished.

In order for an article to be visible through the Sugar Portal, the article must meet all of the following requirements:

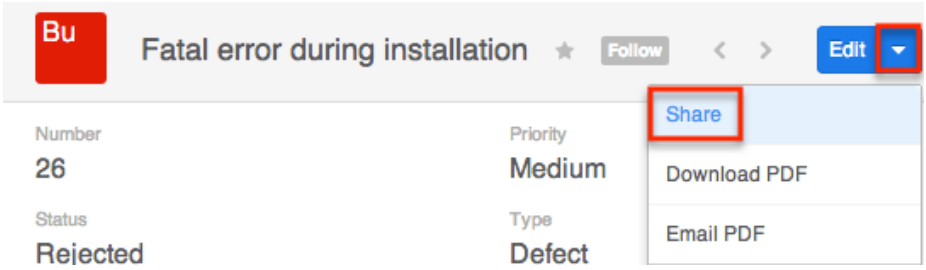
- External Article = Checked
- Status = Published
- Expiration Date = In the Future

If any one of these conditions is not met, the article will not be visible through the Sugar Portal.

For more information please refer to the Knowledge Base.

## Sharing Bugs

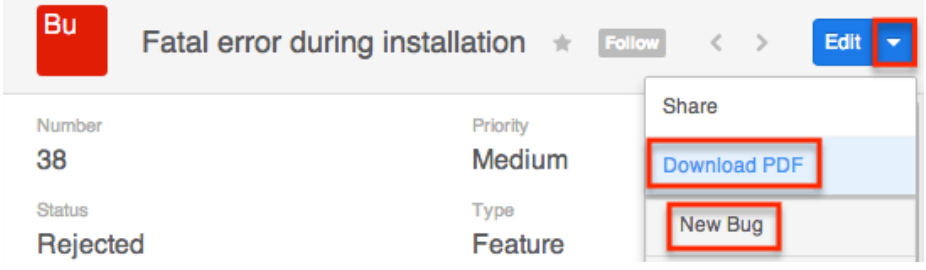
Individual Bug records can be shared with other users in your organization by sending an email with the record's link directly from the record view. In the bug's record view, select "Share" from the Actions menu which will open a Compose Email window including the URL of the bug record. Enter the recipient(s) email address in the To field then click "Send".




Users can simply click the link in the email to access the bug record in Sugar. Please note that the user must be logged into Sugar in order to access the record. Users will only be able to view the shared record as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management management documentation in the Administration guide.

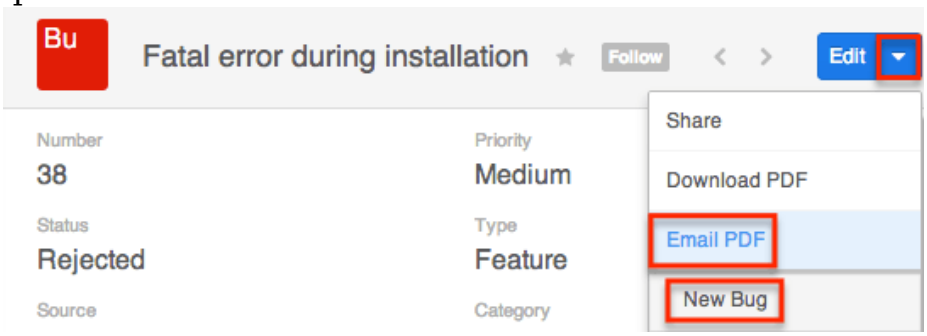
## Downloading Bug Information as a PDF

Users have the option to download bug information as a PDF file via the Bugs record view by clicking the Actions menu and selecting "Download PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Download PDF option in the Actions menu. Simply select one of the templates to generate the PDF file to view or save onto your local machine. Please note that the Download PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.

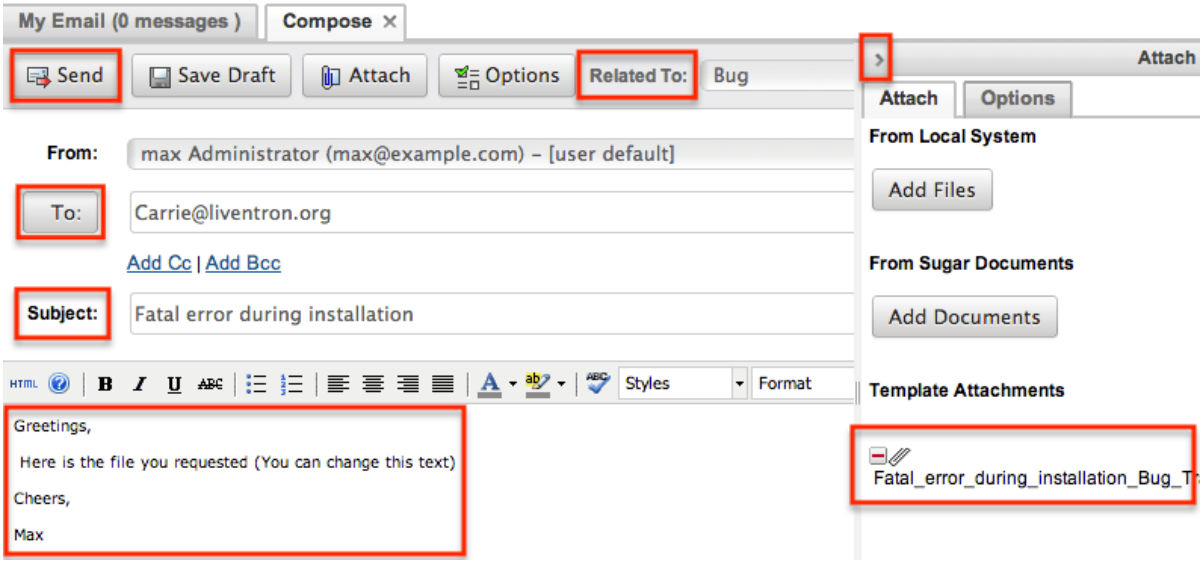


# Emailing Bug Information as a PDF

Users also have the option to email bug information as a PDF file using any of the available Bugs module templates using Sugar's email client. Simply click the Actions menu and select "Email PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Email PDF option in the Actions menu.



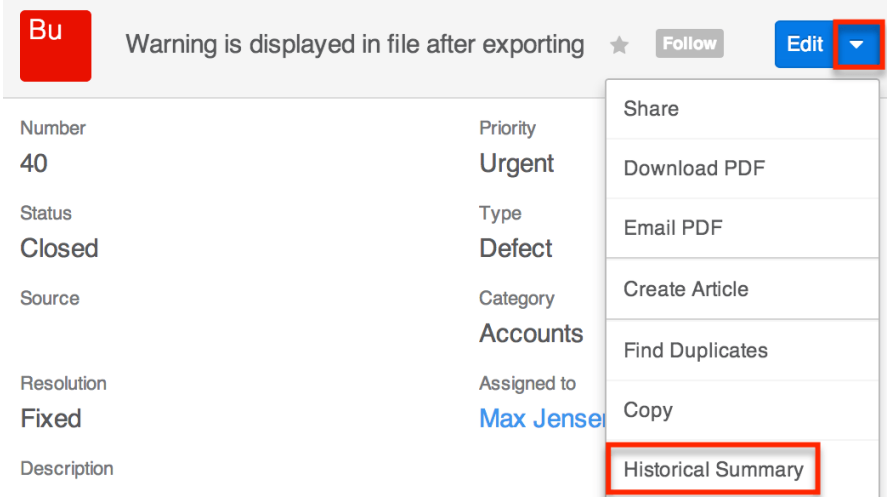

Select one of the templates to open a Compose window in the Emails module. The email's To field will automatically populate with the email address of the bug record, and the Subject field will display the bug's name. The email is automatically related to the bug record, and the chosen bug PDF will be attached. You can update the fields as necessary and enter a body for the email message then click "Send". For more information on sending emails via the Emails module, please refer to the Emails documentation.




Please note that the Email PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation.

# Viewing Activities' Historical Summary

Users can easily view quick details for the various related activities (e.g. tasks, notes, emails, etc.) that have taken place via the Historical Summary option. Simply navigate to the bug's record view and select "Historical Summary" from the Actions menu to view the historical activities related to the bug in one place.

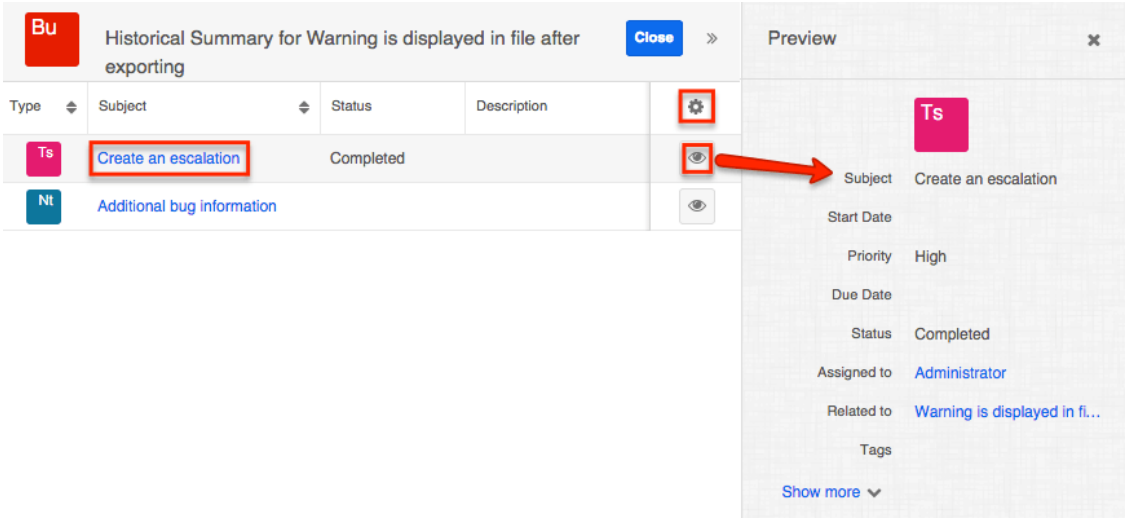



The Historical Summary page will display each activity's type, subject, status, description, date modified, etc. and you can simply click the activity's name to view the full details for each activity. Please note that you can add Date Created and User fields by clicking the Column Selection icon to the far right of the list view column headers. You can also preview the activity record via the intelligence pane by clicking the Preview icon to the far right of each record's row. It will provide users with key information regarding the record as well as the related activity stream information (if any). For more information on activity streams, please refer to the Activity Streams documentation. Please note that preview is only available for modules (e.g. Task, Note) using the Sidecar user interface.

The historical summary list view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the system's default column order.

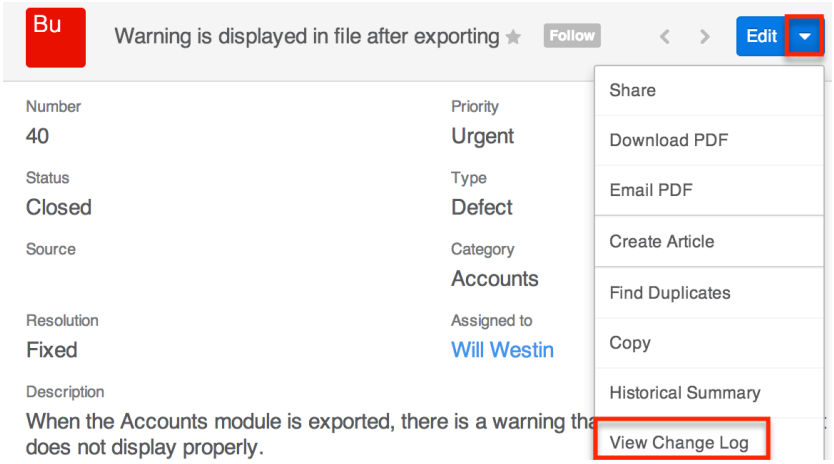
Users can also easily adjust the size of columns in the historical summary list view per their viewing preference. Simply place your cursor on the column divider, and when the Left and Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user

removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the Historical Summary list view is different from the default column width.

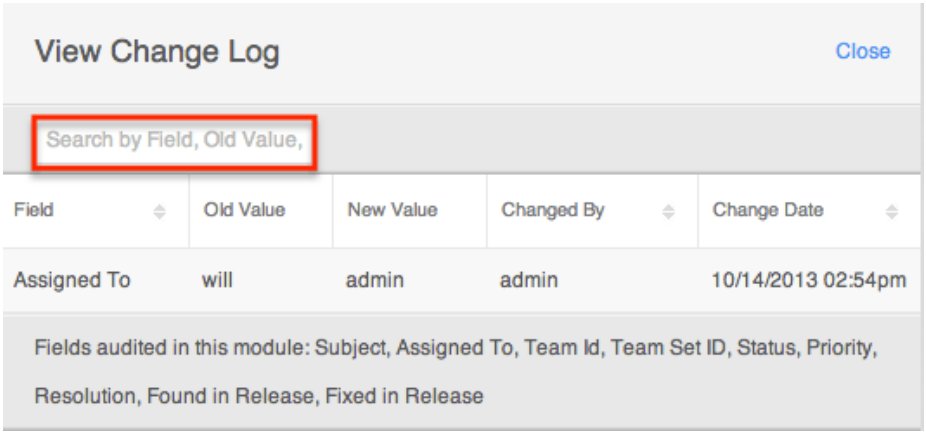



## Viewing Bugs Change Logs

Changes made to each bug record are tracked over time, and users are able to view the history of changes via the change log in each bug's record view. To view the change log, navigate to a bug in record view and select "View Change Log" from the Actions menu. Please note that only fields marked as "Audit" in Admin > Studio will be displayed in the change log. For more information on designating for audit, please refer to the Studio documentation in the Administration guide.




Once the change log opens, you can view the details of historical changes and can search by field name, old value, etc. by entering the keyword into the search box.




## Communicating Regarding Bugs

Sugar includes the functionality to allow users to communicate with customers and keep an archive of communication between your users and the customers with regards to bugs. Communication regarding bugs can be performed using the Bug Portal.

The Bug Portal can be used to both view and submit bugs from a customer to engineering or QA departments, but can also be used as a method of communication regarding a bug. Both customers and Sugar users have the option to add notes to bugs. Users can do this via the History Dashlet. Customers have this as an available option when viewing the details of a bug. For more information on using the Bug Portal, please refer to the Portal Deployment User Guide. When a customer adds a note to the portal, the note will be available for viewing inside Sugar. In addition, when a user adds a note to a bug from Sugar, the note will be available to be viewed in the Bug Portal assuming the Display in Portal field is checked on the note. These notes are visible by anyone with access to the support portal.

Last Modified: 12/21/2015 06:13pm

# Projects

## Overview

Sugar's Projects module is used to track a variety of tasks in order for a project manager to properly organize and complete a given project. Projects are tracked using both a project grid and a Gantt chart. Resources (e.g. contacts and users) can be allocated to the tasks of each project to help ensure your deadlines are met.

Projects are also able to be associated to different accounts, contacts, opportunities, or other modules so that if a project is a direct result of one of these modules, such as the project being performed that was purchased through an opportunity, the relationship will show and alternate details be made available.

Note: This module is hidden by default. The administrator must enable it for your use.

## Project Fields

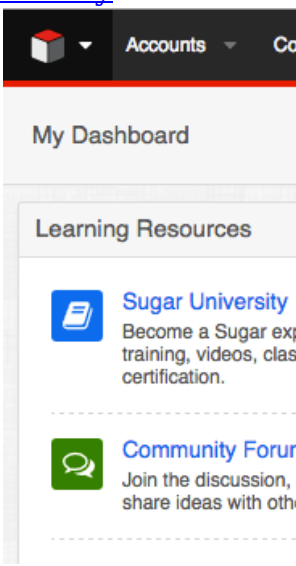
The Projects module contains the following fields which enable users to create and properly organize projects.

| Field | Description |
|---|---|
| Assigned to | Enter the name of the user who has ownership of the project, which is assigned to you by default |
| Date Created | The date the project record was created |
| Date Modified | The date the project record was last modified |
| Description | Enter a brief description of the project |
| End Date | Click the Calendar icon and select the project end date |
| Name | Enter a name for the project |
| Priority | Select the importance of the project from the dropdown list, such as Low, Medium, or High |
| Start Date | Click the Calendar icon and select the project start date |
| Status | Select a value from the dropdown list such as Draft, In Review, or Published to show the approval status of the project |
| Team | The Sugar team(s) assigned to the project |

## Projects Module Tab

The Projects module tab is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access the Projects list view. You may also click the

triangle on the tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of projects you last viewed in the module.




The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|---|---|
| Create Project | Opens the edit view layout to create a new project |
| Create Project Template | Opens the edit view layout to create a new project template |
| View Project List | Opens the list view layout to search and display projects |
| View Project Templates | Opens the list view layout to display project templates |
| View Project Tasks | Opens the list view layout to search and display project tasks |
| View My Projects Dashboard | Opens the Projects Dashboard |

If you do not see the Projects module tab in Sugar, please check the following:

- The Projects module may be marked as hidden in your user preferences, which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Projects module in the Hide Modules list, simply move it to the Display Modules list and save. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Projects module for your entire Sugar instance. Reach out to your Sugar administrator to have the Projects

module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

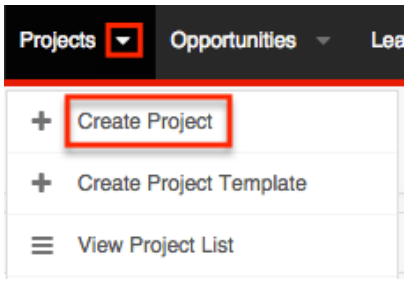
## Creating Projects

There are three methods for creating projects in Sugar including via the Projects module, quick create, and Project Templates. The full edit view layout opens when creating the project directly from the Projects menu as well as via the Quick Create menu and includes all of the relevant fields for your organization. You can quick create a project while viewing an existing record (e.g. Accounts) of another module and Sugar will automatically create a relationship between both records. For example, if you are viewing an account record (e.g. ABC Company) and create a new project via the Projects subpanel, the project record's Accounts subpanel will automatically populate with "ABC Company", thus creating the relationship. Please note that administrators can configure both the Edit View and Quick Create layouts via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

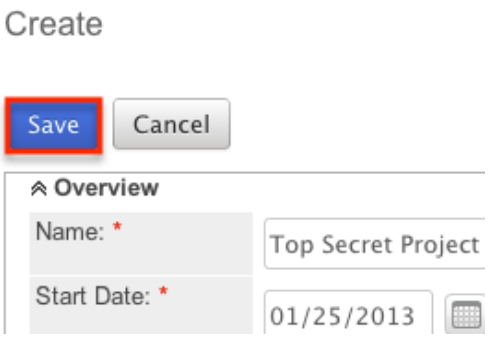
### Creating Via Projects Module

One of the most common methods of project creation is via the Create Project option in the Projects module tab. This opens up the edit view layout, which allows you to enter in all the relevant information for the project.
Use the following steps to create a project via the Projects module:

1. Click the triangle on the Projects module and select "Create Project".




2. Enter appropriate values for the fields in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".

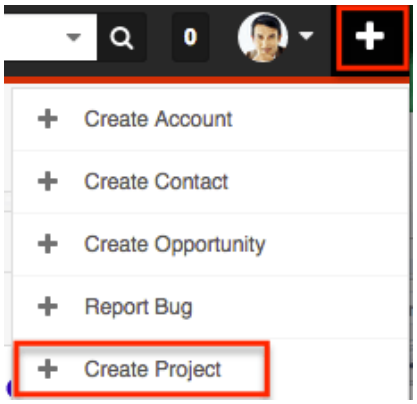



## Creating Via Quick Create

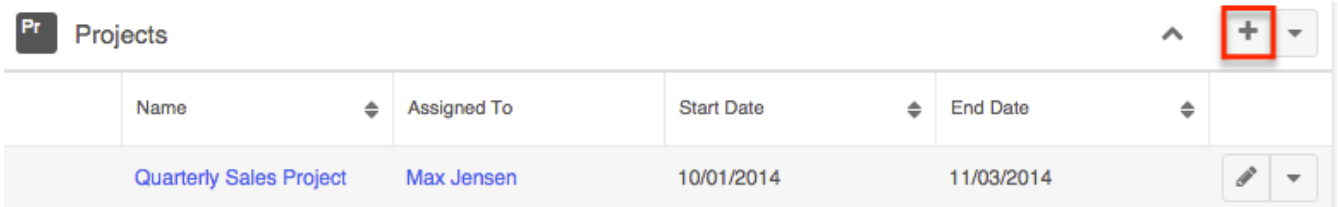
The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also easily create new records from any Projects subpanel on related module records.

Use the following steps to create a project via Quick Create:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Project". You can also quick create projects using the following methods below:
   From Quick Create menu:

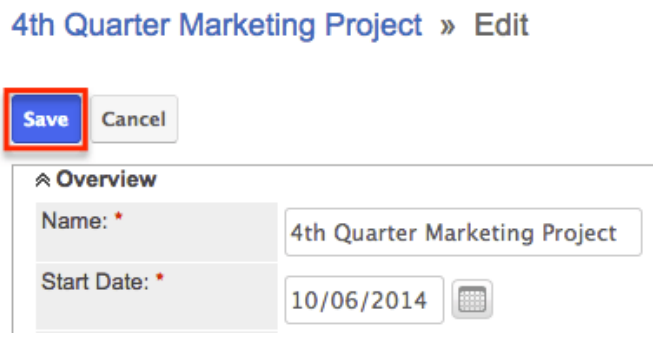
   From Projects Subpanel (Sidecar modules):

   From Projects Subpanel (Legacy modules):



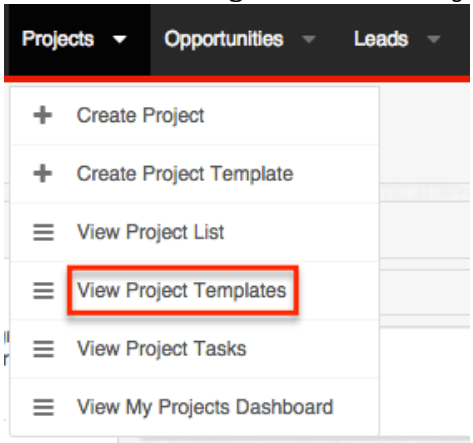

2. Enter appropriate values in the fields in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
3. If creating the project via the Projects subpanel in a Legacy module and additional fields are desired, click the Full Form button to use edit view instead.
4. Once the necessary information is entered, click "Save".




## Creating Via Project Template

Project Templates are used when a similar project is going to be configured time and time again. See Project Templates for more information. After you have a template already created, you can use the template to create additional projects, following these steps:

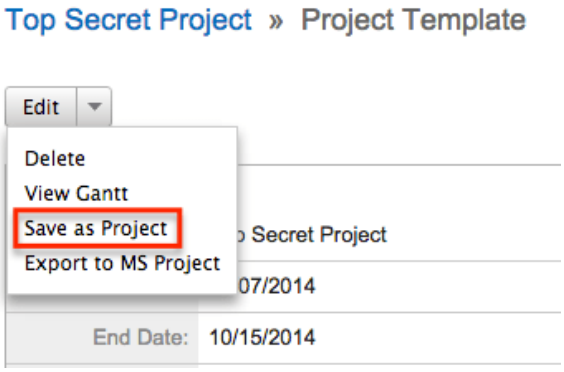
1. Click the triangle on the Projects module and select "View Project Templates".




2. While on the Project Template list view, click the name of your template to

open the template's detail view.

3. Select "Save as Project" from the Actions menu.




4. Change the name of your new project as need be and click "Save as New Project", where you will be brought to the detail view of your new project.

## Viewing Projects

There are various options available for viewing projects in Sugar including via Projects list view, Projects detail view, Projects Recently Viewed menu, the Project Dashboard, dashlets, and reports. Please note that you will only be able to see projects records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide.

### Viewing Via List View

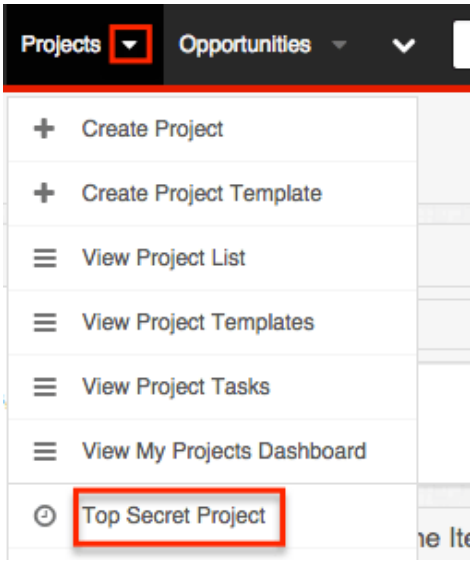
The Projects list view displays all project records meeting the current search criteria. To access the list view, simply click the Projects module tab. While list view shows key project fields, you can click the project's name to open the record in detail view. For more information on viewing project via list view, please refer to the Projects List View section.

### Viewing Via Detail View

The Projects detail view displays thorough projects information including all project fields followed by subpanels of the project's related records belonging to various modules. The detail view can be reached by clicking a project record's link from anywhere in the application including from the Projects list view. For more information on viewing projects via detail view, please refer to the Projects Detail View section.

### Viewing Via Recently Viewed

As you work, Sugar will keep track of which projects and project templates you have recently viewed. Click the triangle on the Projects module tab to see a list of your most recently viewed projects and click each name to open the project in detail view.



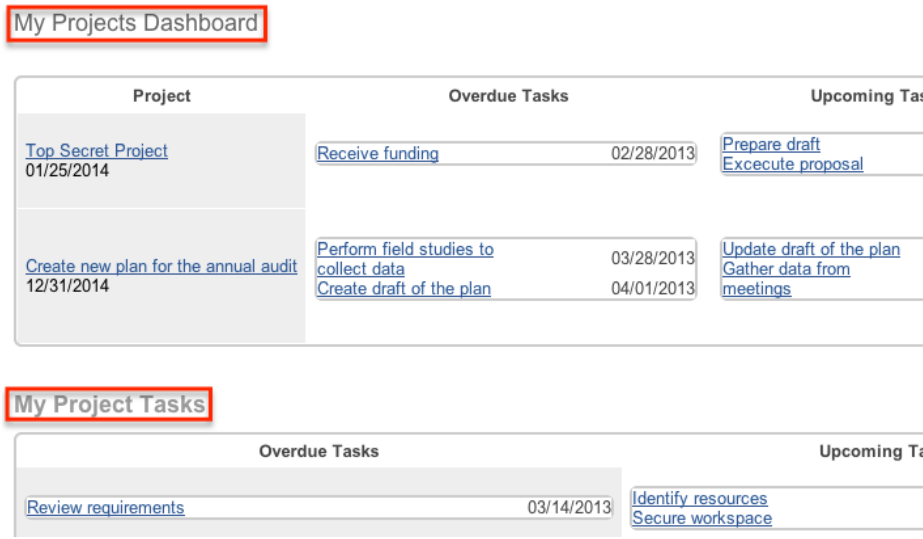

## Viewing Via Project Dashboard

The Project Dashboard allows users to view upcoming and overdue project tasks, as well as any support cases related to projects the user is assigned to. It also allows an option for users to view any upcoming or overdue project tasks that are assigned to the user. The Project Dashboard can be reached by clicking the appropriate link in the Projects module tab .

The "My Projects Dashboard" panel shows four columns, showing projects that are assigned to you, any overdue project tasks where the Finish Date is in the past, any upcoming project tasks where the Start Date is within the next week, and any cases that are open related to the project.

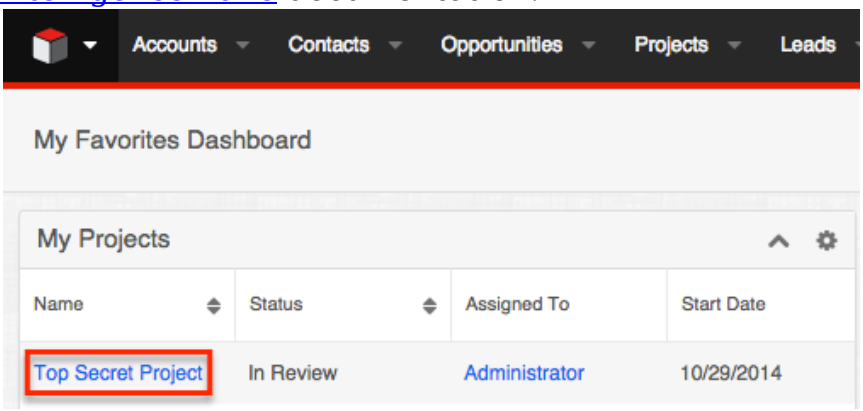
The "My Project Tasks" panel shows two columns, showing any overdue project tasks assigned to you where the Start Date is in the past, any upcoming project tasks assigned to you where the Finish Date is within the next week.

All record references, for projects, project tasks, or cases, on either panel, are clickable and will bring you to either the detail view for the specific record or the Gantt chart of the parent project.




## Viewing Via Dashlets

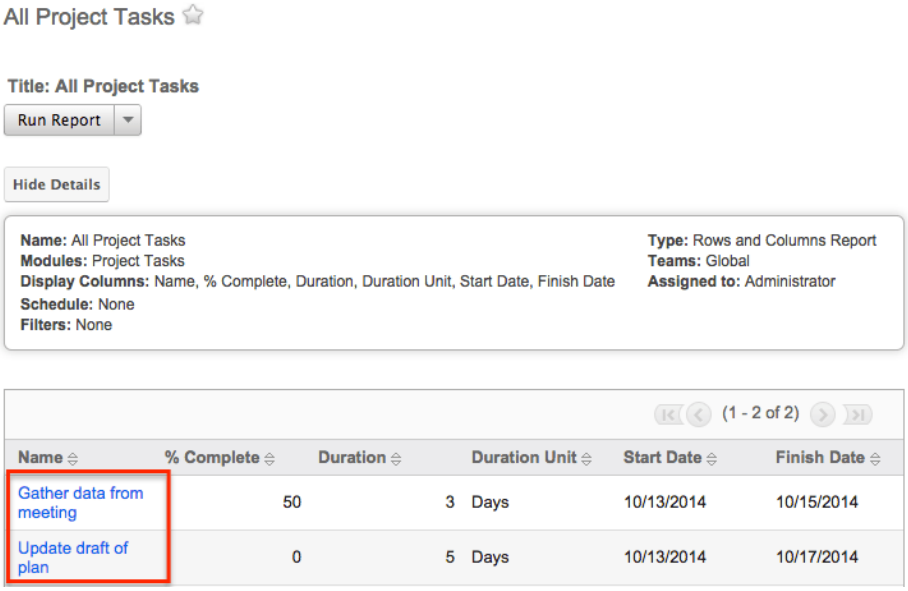
Sugar Dashlets allow users to get a quick view of various records, activities, reports, etc. Dashlets may be added to a user's Home page or to the intelligence pane of any module. You can view account information in List View dashlets specific to the Projects module (e.g. My Projects dashlet). Clicking a project's name from any dashlet will open the Project record view. For more information on using dashlets and viewing account records via dashlets, please refer to the Intelligence Pane documentation.




## Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding projects and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the project record's detail view by clicking the project's name in the report results. Please note that you can only directly access project detail views with Rows and Columns-type and Summation with Details-type reports as

Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation.




Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Roles documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

## Searching Projects

The Projects list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Projects list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.

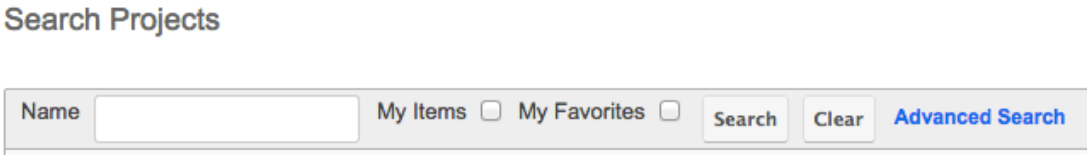
For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.
Note: Projects is hidden from Global Search by default. The administrator must enable it for your use.

## Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.

The buttons and checkboxes available in Basic Search panel have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Items : Select this box to return only records assigned to you.
- My Favorites : Select this box to return only your favorite records.




When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Items" and enter a project name, Sugar will only return projects with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all projects to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see projects as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide.

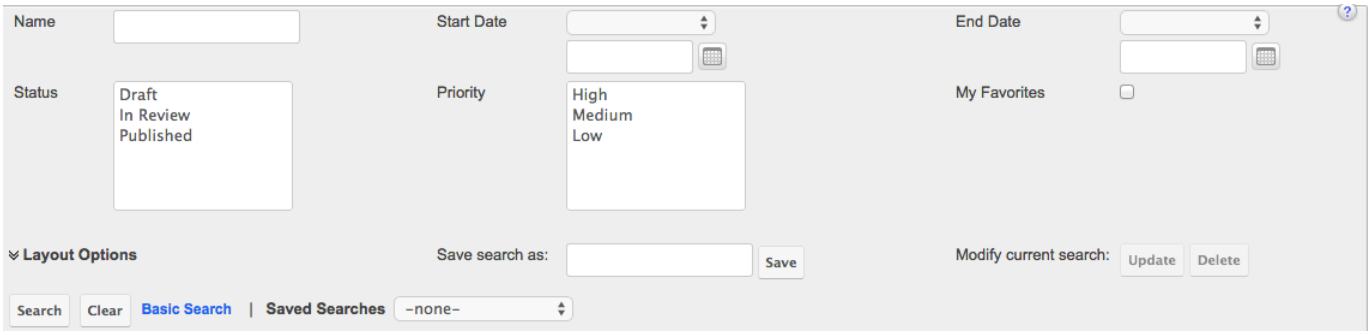
Administrators can configure what fields appear on the Projects Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Advanced Search

Advanced Search offers a more in-depth search experience than Basic Search including additional fields, layout options, and saved search capability. From the Advanced search panel, you can click "Basic Search" for simplified searching.

The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the Layout Options section of the Search documentation.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section of the Search documentation.




When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select "My Items" and enter in a project name to search, Sugar will only return projects with a matching name that are assigned to you. When searching by a multiselect or dropdown field (e.g. "Status"), however, Sugar will return records matching any of these selections. Once the search completes, the relevant results will populate in the list view below the search panel. To see all projects to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see projects as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide.

Administrators can configure what fields appear on the Projects Advanced Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search may be used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text

string is entered in the search box.




To use global search, you need to first enter the keyword into the search box. With Full Text Search enabled, pop-up results will begin appearing once you input three or more characters. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. When Full Text Search is not enabled, results starting with your keyword will appear after clicking the magnifying glass icon or hitting your Return/Enter key. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Studio documentation as well as the Search section of the System documentation in the Administration guide.

## Projects List View

The Projects list view displays all projects meeting the current search criteria and to which your user has access. You can view the basic details of each project within the field columns. Please note that you will only be able to see projects as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide.

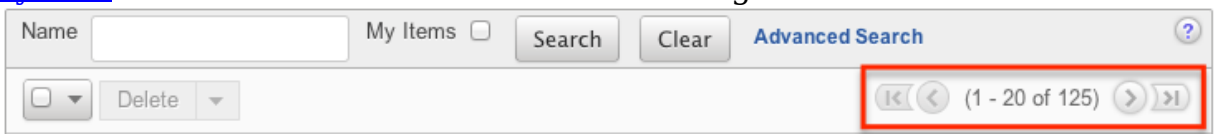
You have the option to change what fields are displayed in list view by configuring your layout options in the Projects Advanced Search. For more information on configuring your list view, please refer to the Layout Options section of the Search documentation. Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

### Pagination

List view displays the current search results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. To the right

just below the search panel you can see which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of your current results.

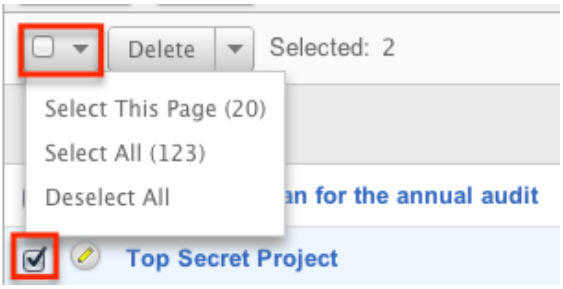
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.




## Checkbox Selection

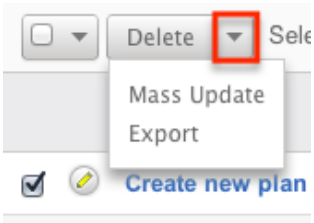
You can perform several actions on projects directly from the list view by first selecting the desired records. To select individual projects on the Projects list view, mark the checkbox on the left of each row. To select or deselect multiple projects on the list view, use the options in the checkbox dropdown menu:

- Select This Page : Selects all records shown on the current page of project results.
- Select All : Selects all records in the current search results across all pages of project results.
- Deselect All : Deselects all records that are currently selected.




## Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.




The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---|---|
| Delete | Delete one or more projects at a time |
| Mass Update | Mass update one or more projects at a time |
| Export | Export one or more projects to a CSV file |

## Favorite Designation

Users have the option to mark project records as favorites via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Projects module tab. In the Projects list view, the star on the left of each record's row is yellow once marked to indicate a favorite project. For more information on how to mark records as favorites, please refer to the Favoriting Projects section of this documentation.

## More Information

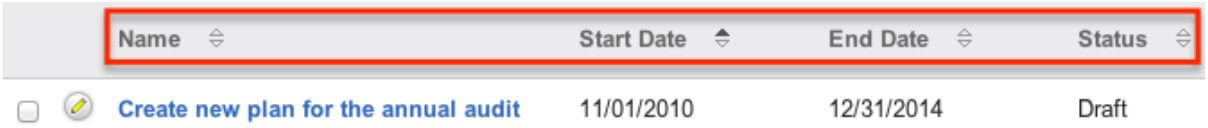
Additional details for each project can be viewed by clicking the "i" icon to the far right of each list view row. This provides users a quick view of additional project information in addition to what appears in the display column fields. The resulting pop-up window will show the Description field by default. The list of fields appearing here may only be configured through a code-level customization.




## Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the

sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time. You can also set a default order-by column using the layout options in Advanced Search. For more information on setting a default column sort, please refer to the Layout Options section of the Search documentation.



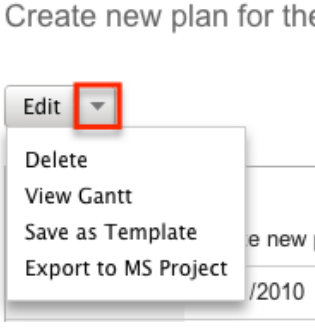

## Projects Detail View

The Projects detail view displays thorough project information including all project fields, which are grouped by default into the Overview and Other panels. You can also view a project's related records (Activities, Opportunities, Cases, etc.), which appear in subpanels beneath the project fields. The detail view can be reached by clicking a project's link from anywhere in the application including from the Projects list view.

Please note that you will only be able to view a project record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

### Actions Menu

The Actions menu on the top left of each project's detail view allows you to perform various actions on the current record. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the System documentation in the Administration guide.




The options in the Actions menu allow you to perform the following operations:

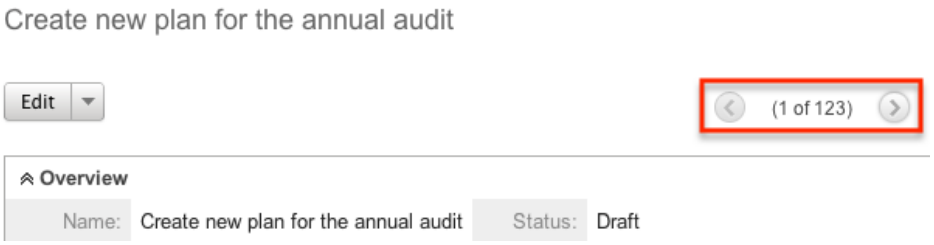
| Menu Item | Description |
| --- | --- |
| Edit | Edit this project |
| Delete | Delete this project |
| View Gantt | View the project's Gantt chart |
| Save As Template | Save this project as a template for future use |
| Export To MS Project | Export this project to an MPX file for use with Microsoft Project |

## Favorite Designation

Users have the option to mark project records as a favorite via the detail view as well as the list view. This allows users to designate records that are important or will be viewed often as they can easily be accessed via search or from the Projects module tab. In the Projects detail view, the star on the right of the record's name is yellow once marked to indicate a favorite project. For more information on how to mark records as favorites, please refer to the Favoriting Projects section of this documentation.

## Next or Previous Record

On the upper right of the Projects detail view, there are two buttons that allow you to page through each project in the Project list view's current search results. Clicking the Previous button displays the previous project of the current search results while clicking the Next button displays the next project of the current search results. The text in between shows which project result you are currently viewing within the total number of current results.




## Subpanels

Beneath a project's fields are subpanels containing all of the users and contacts that are working on the project, the project's tasks that need to be done, any holidays or days off of the project so they will not be included in the date and time calculations, and related records from various modules.

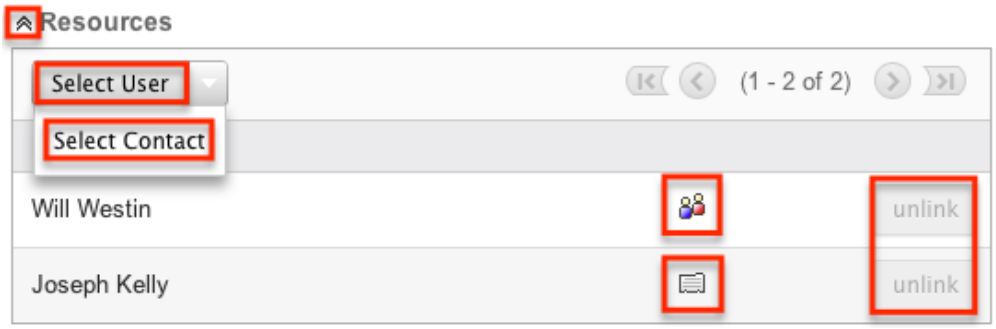
Please note that administrators can prevent users from moving subpanels to different locations in the detail view. For more information on preventing rearranging of subpanels, please refer to the System documentation in the Administration guide. Check with your system administrator if you are not able to rearrange your subpanels.

Resources Subpanel

The Resources subpanel is used to add specific Sugar users and contacts to the project. When these users and contacts are added to the project, they will be available to be added as resources on project tasks via the Gantt chart, meaning they are the responsible party for the task. For more information on project resources, please review the Project Resources section of this documentation.

The Resources subpanel allows the following operations to be performed:

- To view the details of a related user or contact, click the Users or Contacts icon in the subpanel to open it in detail view.
- To relate an existing user or contact to the project, choose the appropriate "Select" option from the subpanel's Action menu, then locate and select the desired record.
- To remove the resource from the project, click "Unlink" from the dropdown on the far right of the record's row. This removes the relationship, but does not delete any actual records.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.




Note: If you are not able to view this subpanel, the administrator may have disabled the Projects subpanel for your entire Sugar instance. Reach out to your Sugar administrator to have the subpanel displayed. For more information on displaying and hiding subpanels throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

## Project Tasks Subpanel

The Project Tasks supbanel lists all of the project's Project Tasks and basic details of each task. When a task is added to the project via the Gantt chart, the project task will appear on this subpanel. The Project Tasks subpanel allows the following operations to be performed:

- To view the details of a project task, click the record's name in the subpanel to open it in detail view.
- To add additional tasks to the project, click the "View Gantt" button from the subpanel's header and follow the information provided in Creating Project Tasks section of this documentation.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

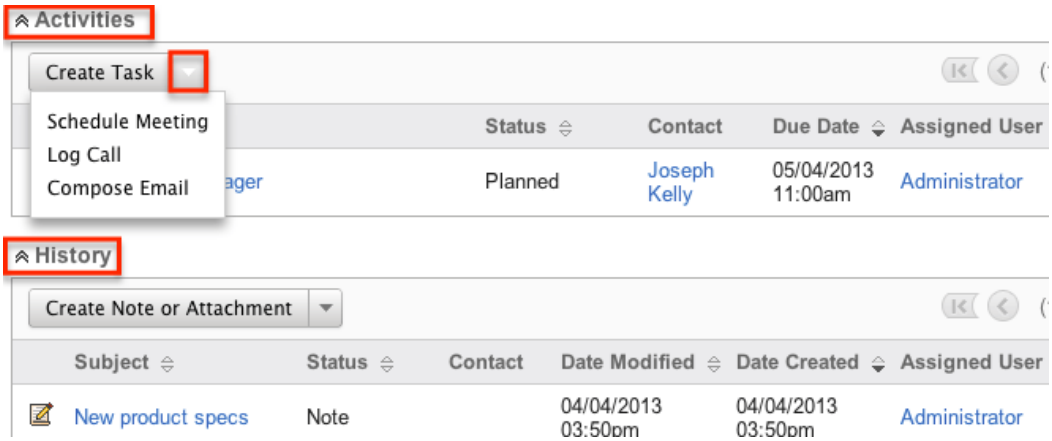
## Project Holidays Subpanel

The Project Holidays subpanel lists all of the resources' days that they will not be working. The subpanel includes columns showing the resource's name, the date of the holiday, and a description of the holiday. For more information on Project Holidays, please refer to the Project Holidays section of this documentation. The Project Holiday's subpanel allows the following operations to be performed:

- To add additional holidays to the project, click the "Create" button from the subpanel's header and fill in the necessary fields.
- To remove the holiday from the project, click "Unlink" from the dropdown on the far right of the record's row.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

## Activities and History Subpanels

The Activities subpanel lists open or upcoming tasks, calls, and meetings that are related to the project. Once the activities have taken place or are completed, they will instead appear within the History subpanel. The History subpanel also includes notes and emails associated with the project. For more information on the history and activities subpanel, please refer to the User Interface documentation.




Related Record Subpanels

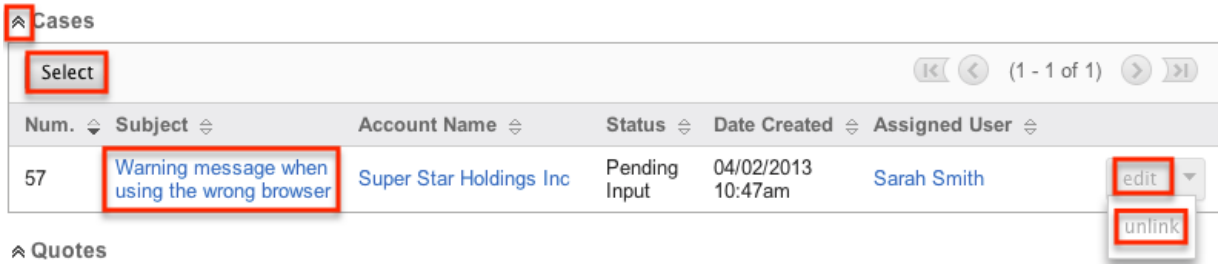
The most common type of subpanels displayed on a project's detail view contain the project's related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. Out-of-the-box, the Projects module does not include any relationships to other modules that would cause a related record to be displayed in the field listing. However, for example, a project may be related to multiple cases. This means that the cases will be displayed in a subpanel beneath the fields listing.

Users with administrator or developer access have the ability to change the fields (e.g. Name, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.

Related record subpanels allow the following operations to be performed. Please note that administrators in Sugar can change the subpanel's Action menu to be displayed as separate buttons instead of a dropdown via Admin > System Settings. For more information, please refer to the System documentation in the Administration guide.

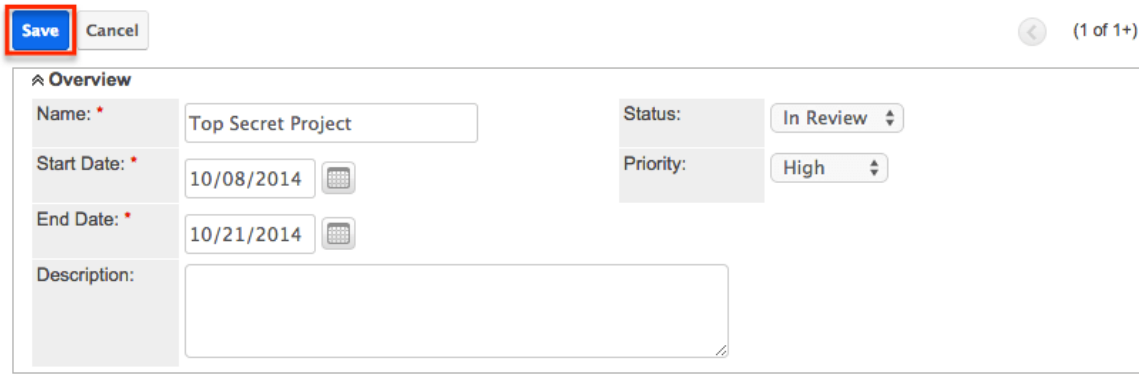
- To view the details of a related record, click the record's name in the subpanel to open it in record view (for Sidecar modules) or detail view (for Legacy modules).
- To relate an existing record to the project, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the project, choose the Create option (e.g. Create Task) from the subpanel's Action menu, then complete the record view layout and click "Save".
- To edit the project's related record, choose "Edit" on the far right of the record's row.

- To delete the project's relationship to a record, choose "Unlink" from the dropdown on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

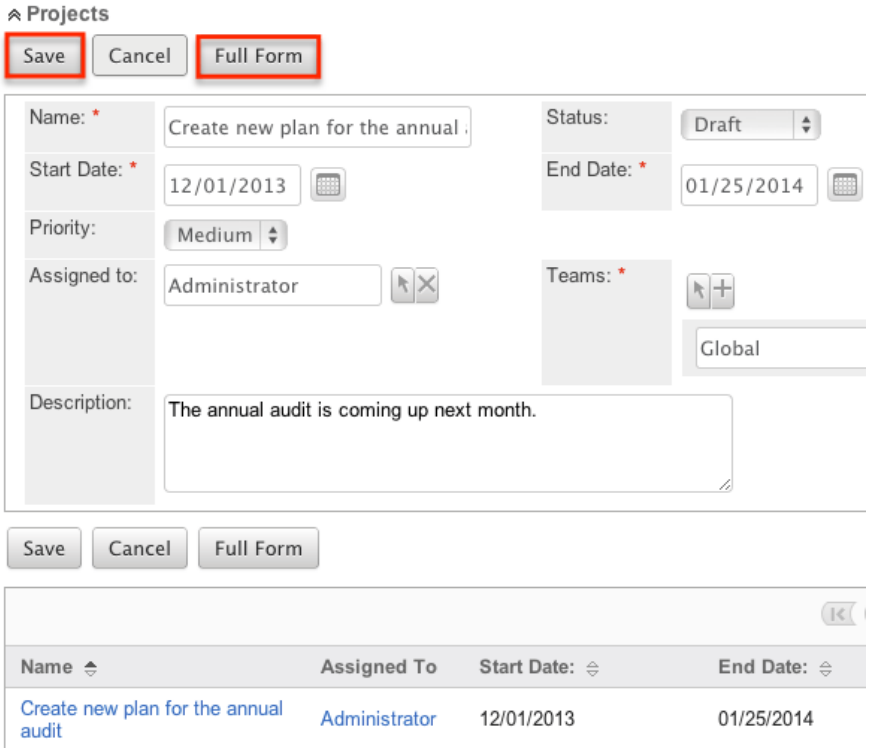



## Editing Projects

Projects may be edited at any time to update or add information to the record. You can make changes to existing project records via the Projects edit view and quick create forms (for Legacy modules). Edit view is available within the Projects module and includes all of the Project fields you should need. To edit the Project Tasks related to this project, please refer to the Editing Project Tasks section of this documentation. Top Secret Project » Edit




Quick create is available for editing projects from outside the Projects module and opens as a pop-up without navigating away from your current page. It generally contains fewer fields, but the Full Form button may be used to access the full edit view should you need to edit additional fields. Please note that the quick create form is only available when viewing Legacy module records (e.g. Quotes).

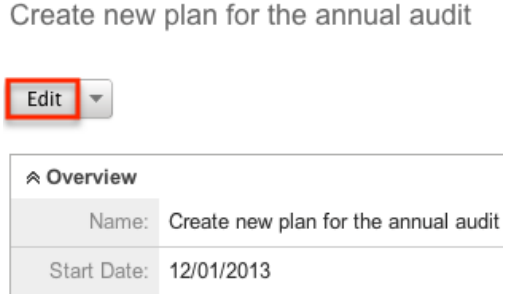



Please note that your ability to edit projects in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure both the Projects edit view and quick create via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

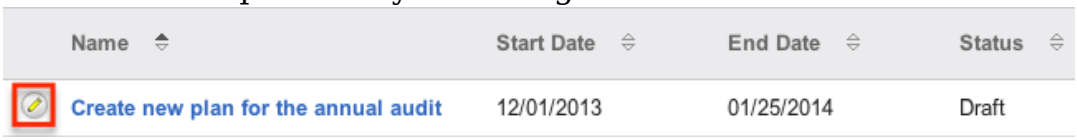
## Editing Via Detail View

You can edit projects via the detail view by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve your changes.




## Editing Via List View

You can edit projects via the list view by clicking the Pencil icon to the left of each project's name. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve your changes.




## Deleting Projects

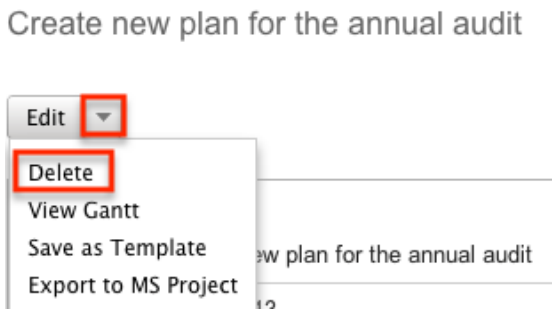
If a project record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Projects detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting projects will not delete related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records if necessary.

Please note that your ability to delete projects may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

### Deleting Via Detail View

Use the following steps to delete a project via the detail view:

1. Navigate to a project's detail view.
2. Select "Delete" from the Actions menu.

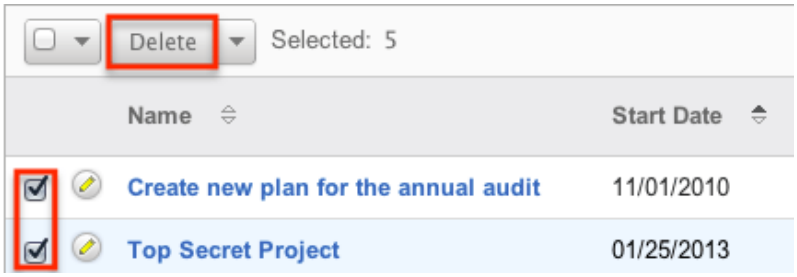



3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

### Mass Deleting Via List View

Use the following steps to delete one or more projects via the list view:

1. Navigate to the Projects list view by clicking the Projects module tab.
2. Use the Basic or Advanced Search to find the project records you wish to delete.
3. Select the desired project records individually or using the Checkbox Dropdown's options.
4. Choose "Delete" from the Actions menu.



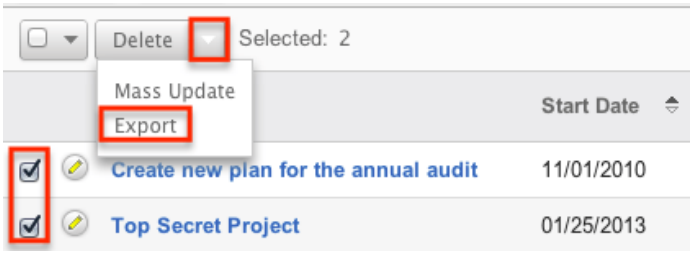

5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Due to PHP memory limitations on the server, there may be occasions when the application times out while deleting a large number of project records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

## Exporting Projects

Sugar's Export option allows users to download all fields for the selected projects to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Project data with other software such as Microsoft Excel. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of project records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Projects may be exported from the Projects list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for projects and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.




Please note that your ability to export projects from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

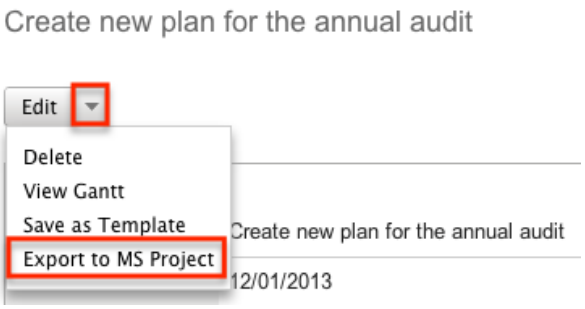
### Exporting to Microsoft Project

Sugar includes the functionality to export projects not just in CSV format, but also in .MPX format. MPX is the standard format used by Microsoft Project. Upon exporting this file, you will be able to open the file in Microsoft Project, which allows people who are not Sugar users to be able to view this project information.

Note: MPX file format is not supported by MS Project 2013.

The following steps cover exporting a project to Microsoft Project:

1. Navigate to a project's detail view.
2. Select "Export to MS Project" from the Actions menu.




3. Open the downloaded file in Microsoft Project.

## Mass Updating Projects

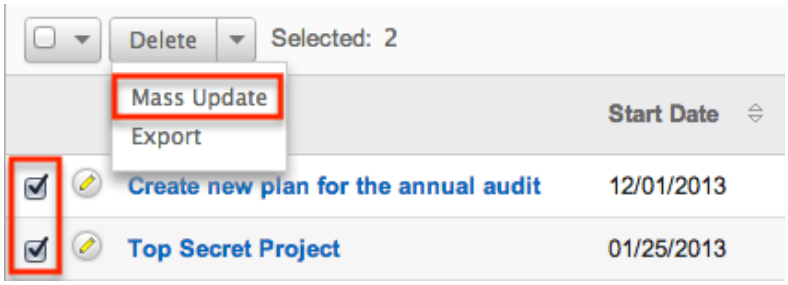
Mass Updating allows users to make the same change to multiple projects at once from the Projects list view. Users with administrator or developer access can control which fields are available to change during mass update via Admin >

Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide. Due to the PHP memory limitations on the server, there may be occasions when the application times out while mass updating a large number of project records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

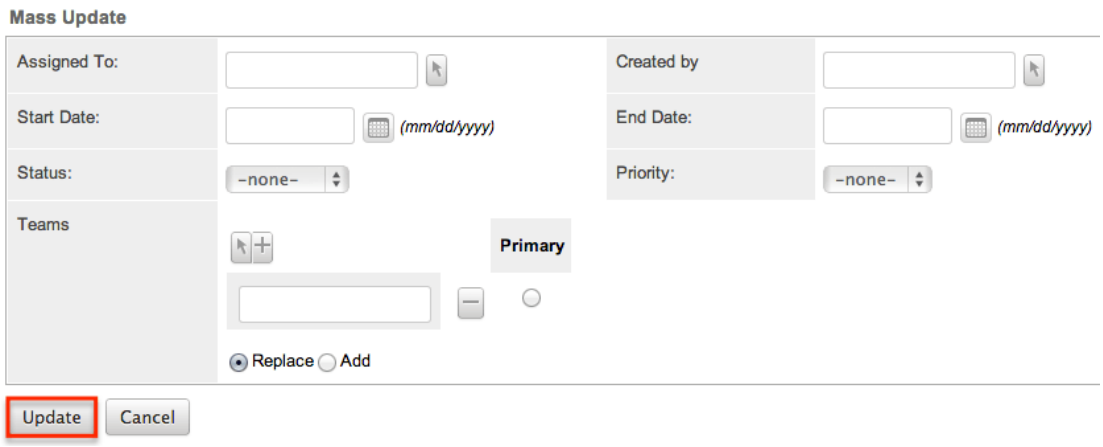
Please note that your ability to mass update projects may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

Use the following steps to mass update projects from the list view:

1. Navigate to the Projects list view by clicking the Projects module tab.
2. Use the list view's Basic or Advanced Search to find projects you wish to modify.
3. Select the desired project individually or using the Checkbox Dropdown's options.
4. Choose "Mass Update" from the Actions menu.




5. Scroll to the Mass Update panel and set values for the fields you wish to alter. Note: For the Teams field, use "Replace" to remove existing team assignments before adding those specified here. Use "Add" to add the teams specified here to any existing team assignments.




6. Click "Update" to save the changes to all of the currently selected project.

## Favoriting Projects

Each Sugar user has the option to designate their own favorite projects which are important or will be viewed often so that they can easily be accessed via search or from the Projects module tab. Once records are marked as favorites, use the My Favorites checkbox in the Projects Basic or Advanced Search to retrieve your favorites or select from your most recent favorites directly from the Projects module tab.

### Favoriting Via List View

Use the following steps to mark records as favorites via the Projects list view:

1. Navigate to the Projects list view by clicking the Projects module tab.
2. Use the Basic or Advanced Search to find the Project records you wish to mark as favorites.
3. Mark the star icon on the left of each desired project's row.
4. To remove the project as a favorite, click the star again to revert it to gray.

### Favoriting Via Detail View

Use the following steps to mark records as favorites via the Projects detail view:

1. Navigate to a project's detail view.
2. Click the star icon to the right of the project's name in the upper left of the detail view to designate it as a favorite.

3. To remove the project as a favorite, click the star again to revert it to gray.

### Favoriting Via Subpanel

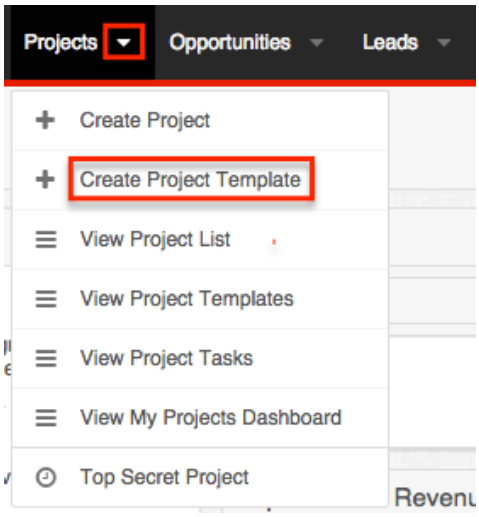
Use the following steps to mark project records as favorites via the subpanel in related modules:

1. Navigate to a related module's record view (e.g. Contacts).
2. Click the star icon to the left of the desired record's row in the Projects subpanel.
3. To remove the project as a favorite, click the star again to revert it to gray.

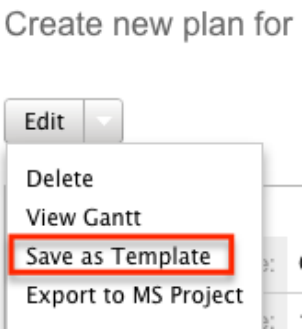
## Project Templates

Project Templates are used when a similar project is used multiple times. Project Templates will save you from recreating the project each time. Instead, the template can be used to create a new project which will have the same information from the detail view and the same Project Tasks . Templates can be reused as often as need be. They can be created using two different ways:

- The module tab's Action Menu



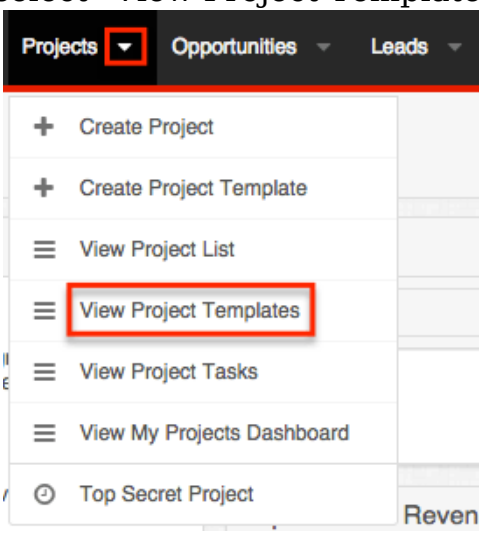

- Replicating an existing project using the Detail View's Action Menu




Choosing this option will bring you to a screen to define a new name for the template so that it can be made unique before saving the template and being mixed with others.

When creating a project from a Project Template, the Project Tasks carry over from the template to the new project. In addition, all of the fields within the module carry over.

To see a list of all project templates, navigate to the Project Templates list view. To access the list view, simply click the triangle over the Projects module tab and select "View Project Templates".

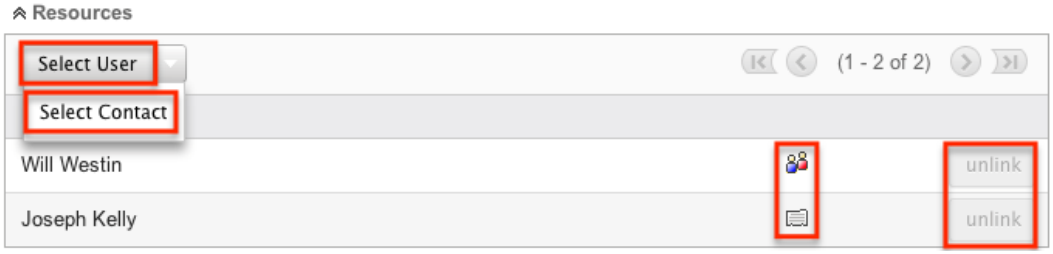



While list view shows key project template fields, you can click the project template's name to open the record in detail view. For more information on the Project Template's list view, please review the Projects List View section of this documentation.

To create a project from a template, please review the Creating Via Project Template section of this documentation.

## Project Resources

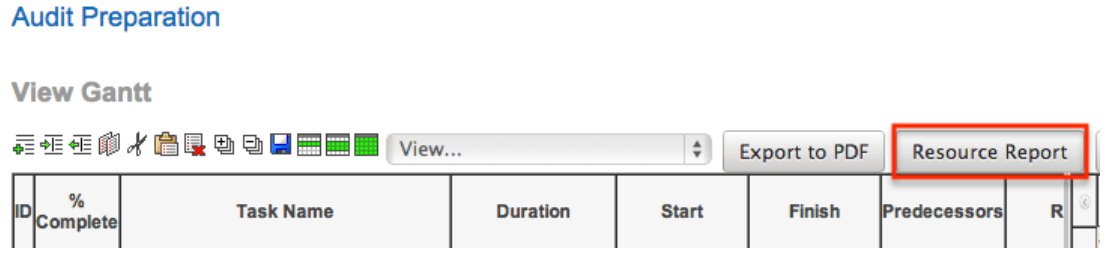
Project Resources are a list of users and contacts that can be assigned Project Tasks . On a project where you are the assigned user, you will see a subpanel on the Projects detail view called "Resources". The subpanel will provide options to Select User, Select Contact, or unlink an existing relationship. In addition any related user or contact resource will have a corresponding icon allowing you to view the user's detail view or contact's record view .




When a resource has been added to the project, the resource will show on the Gantt chart as an available option for Project Tasks to be assigned. For more information on the Gantt chart, please review the Project Tasks Gantt Chart section of this documentation.
Note: If you are not able to view project resources, the administrator may have disabled the Projects subpanel for your entire Sugar instance. Reach out to your Sugar administrator to have the subpanel displayed. For more information on displaying and hiding subpanels throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

## Project Resource Reports

From the Gantt chart, a resource report can be created showing a specific user's or contact's assigned tasks across all projects and the user or contact's workload for a given timeframe.

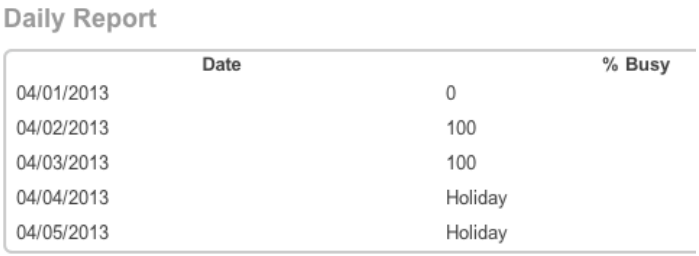



The report is filtered by each resource and filters for tasks starting or finishing after a date, and before another given date. This allows an overall view of the resource's time relative to all projects, not just one specific project.

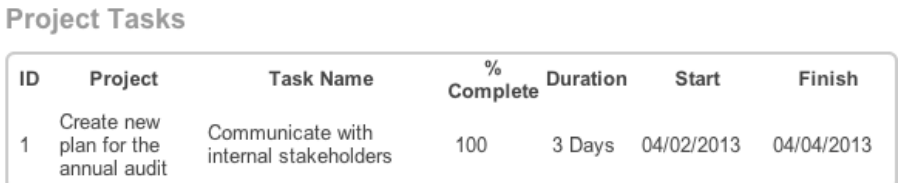



This report shows the following information:

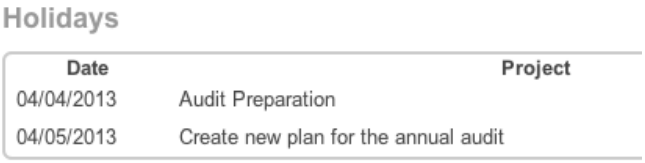
- Daily Report : This section shows a daily breakdown of all weekday dates for the report for the resource. The section also shows a "% Busy" section showing what percentage of an 8 hour day is being taken up for this resource by project tasks. If the resource has a Project Holiday scheduled, the % Busy will show as "Holiday".




- Project Tasks : This section shows a list of all project tasks associated with the resource in the given timeframe. This includes tasks across all projects, not just the project from which the report was generated. This shows details for each task so that you can see each task assigned to the user, as well as the project that the task is for.




- Holidays : This section shows a list of all of the resource's project holidays for the given timeframe. This will show all holidays, regardless of which project they are associated.

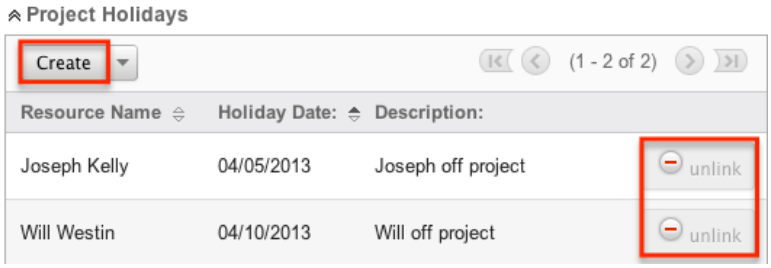


## Project Holidays

The Project Holidays subpanel allows you to list any days that a user or contact resource will not be working on a given project. This links with the project tasks to ensure that timing of tasks is not affected by a resource taking a holiday. The holidays are marked for specific days for specific project resources. Project Holidays contain three fields:

| Field | Description |
|---|---|
| Description | A brief description or reason for the holiday. |
| Holiday Date | The holiday or vacation date for this resource on the project. |
| Resource Name | The user or contact taking the holiday, selected from a dependent dropdown list. |

Holidays created from this subpanel are specific to the project. Holiday records can be deleted and removed from the project by clicking "Unlink" on the corresponding line on the subpanel.




## Project Tasks

Project Tasks are a list of each task that needs to be performed to complete the project. Project Tasks is a separate module than the Projects module, but it can only be accessed via Projects. Each task can be tracked and monitored via the Gantt chart. Each task can also be assigned a specific resource and is given a planned start and finish date allowing the timing to be tracked and planned.

### Project Task Fields

The Project Tasks module contains the following fields, which enable users to properly organize and track each task.

| Field | Description |
|---|---|

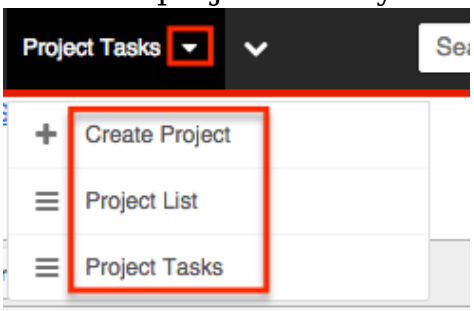
| | |
|---|---|
| % Complete | A numerical value to indicate what percentage of the task has been completed. |
| Actual Duration | After the task is completed, enter a numerical value for the actual duration of the task. |
| Description | Found only in the edit and detail views, enter a brief description of the task and any necessary details. |
| Duration | Only editable from the Gantt chart, enter a numerical value to indicate how long it would take to complete the task which can be specified in days or in hours.<br><br>Note: Changes to this field will affect the Finish Date as well. |
| Estimated Effort (hrs) | Found only in the edit and detail views, enter a numerical value for the estimated amount of work needed for this task. |
| Finish Date | Only editable from the Gantt chart, this field will populate based on the Start Date and Duration. Clicking on this field on the Gantt chart will produce a calendar popup to easily select a date.<br><br>Note: Changes to this field will affect the Duration as well, and will be affected by changes to the Start Date and/or Duration fields. |
| Milestone | Mark tasks as milestones if they are an important and measureable landmark on the way to completing the project. Tasks can be marked with a checkbox on the edit view or by clicking the task ID to highlight the entire row and then right clicking in the Gantt chart. Milestone tasks will include an asterisk next to the task ID on the Gantt chart. |
| Order | The project task's detail view and edit view display an Order field. This field, which was used in the application prior |

| | |
|---|---|
| | to version 5.0, has been replaced by the Task ID field. If you are not using an order number, you can safely remove this field from the Project Task layouts in Studio. |
| Predecessors | If the completion of this task depends on the completion of other tasks, enter the Task ID in this column. This field must be edited and viewed from the Gantt chart.<br><br>Note: Multiple tasks can be predecessors and the IDs can be separated by commas. |
| Priority | Choose a value of Low, Medium, or High for the task which can be edited and viewed from the edit and detail views. |
| Project | The name of the parent project that can be viewed from both the edit and detail views. This value cannot be edited. |
| Resource | Select the individual who is assigned to the task from the Resources dropdown list. |
| Start Date | Only editable from the Gantt chart, this field will automatically populate with today's date. Clicking on this field on the Gantt chart will produce a calendar popup to easily select a date. |
| Status | Found only in the edit and detail view, choose a value representing the current stage of the task. This field also shows on the Project Tasks subpanel . |
| Task ID | When viewing the Gantt chart, the tasks are ordered by Task ID. Task IDs cannot be directly edited from the Gantt chart or the edit and detail views. To move a task to a different section of the list, and therefore change its Task ID, click on the existing ID to highlight the row, then right click to "Cut" and then "Paste" it in the new location. |
| Task Name | Enter the name for the project task here. |

| | |
|---|---|
| Task Number | The project task's detail view and edit view display a Task Number field. This field, which was used in the application prior to 5.0, has been replaced by the Task ID field. If you are not using task number, you can safely remove this field from the Project Task layouts in Studio. |
| Teams | The Sugar team(s) assigned to the task. This is only viewable from the edit and detail view. |
| Utilization (%) | From the dropdown list, select the percentage of a day that the resource should dedicate their work hours towards the assigned task. This field is only found in the edit and detail views of the project task.<br><br>Note: The value of this field is not reflected in the Resource Report. |

## Project Tasks Module Tab

The Project Tasks module tab is located on the navigation bar at the top of the Project Task detail view, Project Task edit view, or Project Task list view. Click the tab to access the Project Task list view. You may also click the triangle on the tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of project tasks you last viewed in the module.




The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|---|---|
| Create Project | Opens the edit view layout to create a new project |
| Project List | Opens the list view layout to search and |

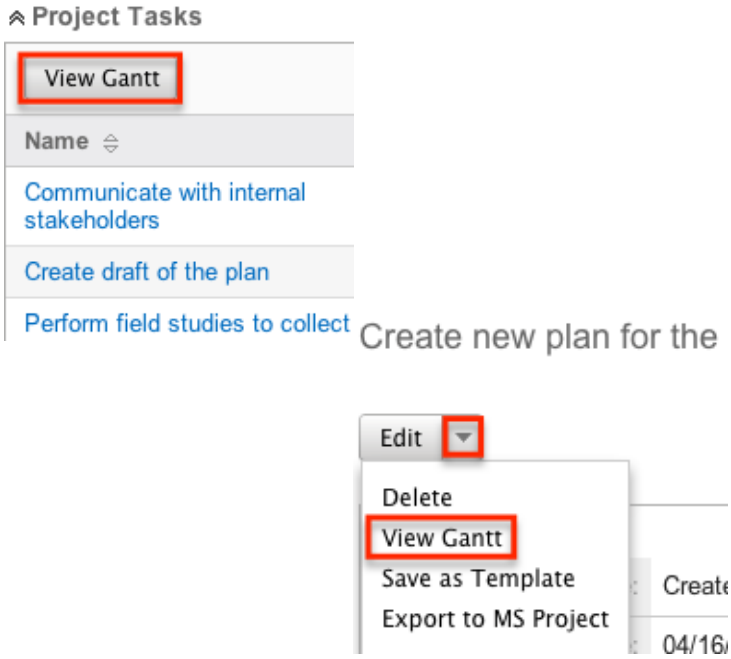
| | |
|---|---|
| | display projects |
| Project Tasks | Opens the list view layout to search and display project tasks |

## Creating Project Tasks

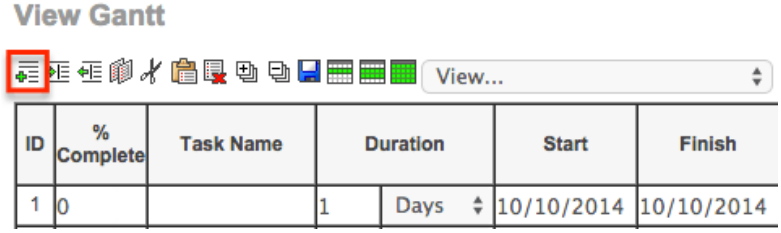
Project Tasks can only be created from the Gantt chart's project grid. The tasks are specific to each project, so they must be created directly from the project. When creating a Project Task from the grid, you will be able to put in basic information about the task. To add additional information later, please review the Editing Project Tasks section of this documentation.

Use the following steps to create a project task via the Projects module:

1. Navigate to the detail view of the project where you would like to add tasks.
2. From the detail view, select "View Gantt" from either the Project Tasks subpanel or the Action Menu.

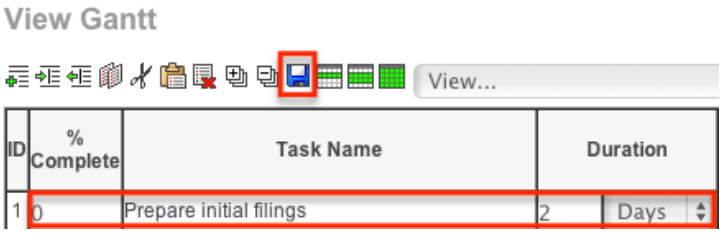



3. Add a row to the grid next to the Gantt chart. This can be done using the icon in the toolbar or by right clicking on the grid.




4. Fill in the grid columns on the new row that you created. When complete,

click the save icon the toolbar.




## Viewing Project Tasks

There are various options available for viewing project tasks in Sugar including via the grid and Gantt chart, the My Projects Dashboard, Project Tasks list view, Project Tasks detail view, Project Tasks Recently Viewed menu, dashlets, and reports.

### Viewing Project Tasks Via Gantt Chart

The Projects module includes a grid and Gantt chart, which allows you to view all project tasks related to a specific project in one place. The grid, on the left of the screen, outlines each task with pertinent information regarding each project task. The Gantt chart, on the right, shows a timeline of each task and how they overlap. For more information on the Gantt chart, please review the Project Tasks Gantt Chart section of this documentation.




### Viewing Project Tasks Via My Projects Dashboard

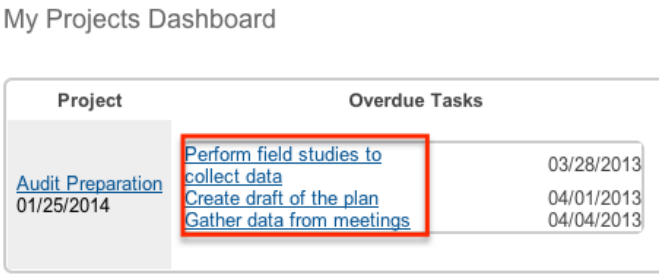
The Project Dashboard allows for users to view any upcoming or overdue project tasks that are assigned to the user, or are related to any projects for which the user is the assigned user. The Project Dashboard can be reached by clicking the appropriate link in the Projects module tab .

The "My Projects Dashboard" panel shows four columns, showing projects that are assigned to you, any overdue project tasks where the Finish Date is in the past,

any upcoming project tasks where the Start Date is within the next week, and any cases that are open related to the project.

The "My Project Tasks" panel shows two columns, showing any overdue project tasks assigned to you where the Start Date is in the past, any upcoming project tasks assigned to you where the Finish Date is within the next week.

Any project task link is clickable and will take you to the grid and Gantt chart for the given project. Next to the task name, Sugar also displays the Finish Date for the task.




## Viewing Project Tasks Via List View

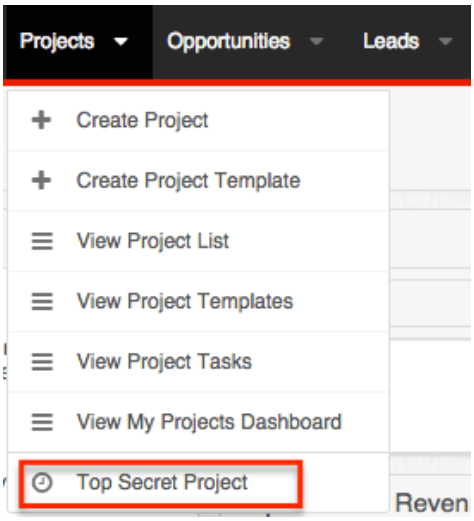
The Project Tasks list view displays all project records meeting the current search criteria. To access the list view, click the "View Project Tasks" option from the Projects module tab. While list view shows key project fields, you can click the project task's name to open the record in detail view. For more information on viewing project via list view, please refer to the Project Tasks List View section.

## Viewing Project Tasks Via Detail View

The Project Tasks detail view displays thorough project task information including all project task fields followed by subpanels of the project task's related records belonging to various modules. The detail view can be reached by clicking a project task record's link from anywhere in the application including from the Projects detail view. For more information on viewing project tasks via detail view, please refer to the Project Tasks Detail View section.

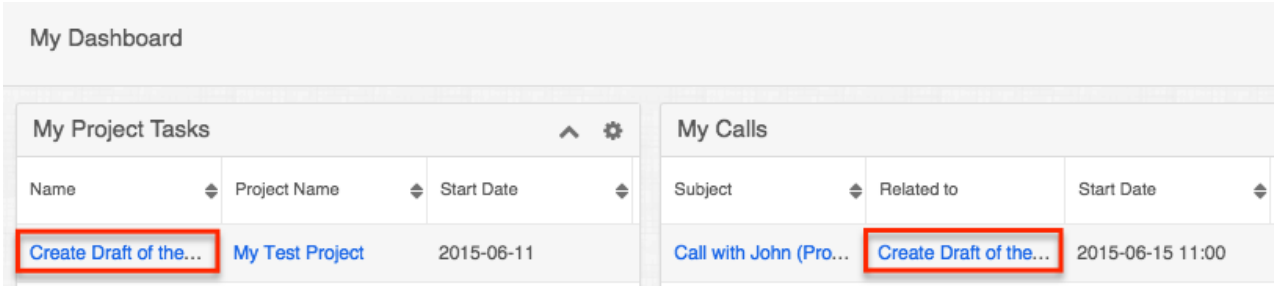
## Viewing Project Tasks Via Recently Viewed

As you work, Sugar will keep track of which project tasks you have recently viewed. Click the triangle on the Project Tasks module tab to see a list of your most recently viewed project tasks and click each name to open the project task in detail view.




Viewing Project Tasks Via Dashlets

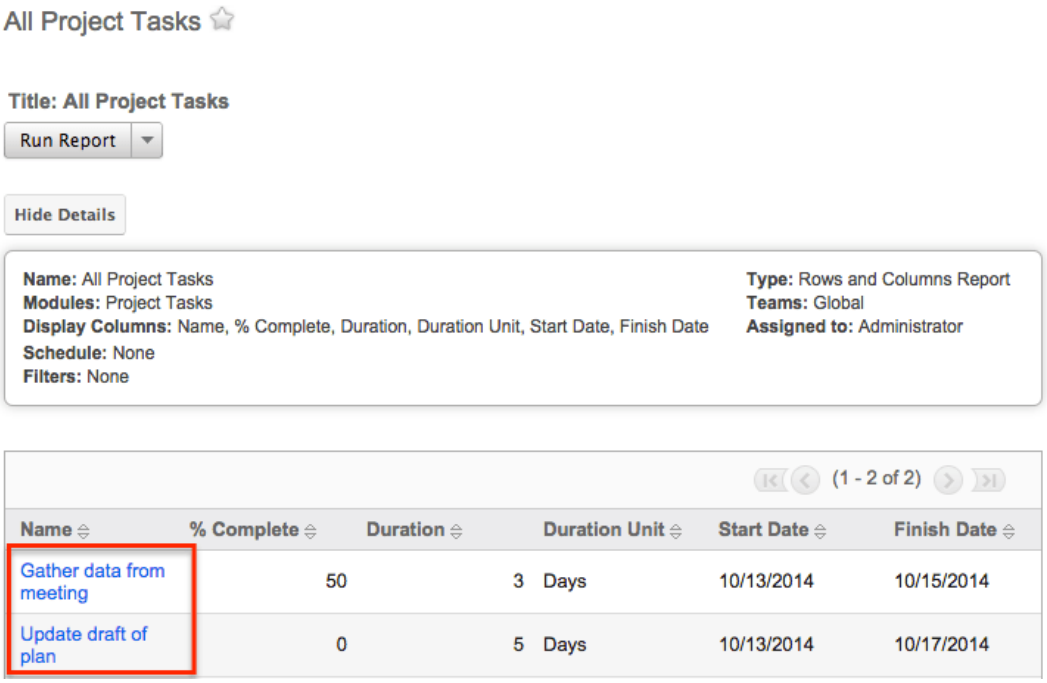
Sugar Dashlets allow users to get a quick view of various records, activities, reports, etc. Dashlets may be added to a user's Home page or to the intelligence pane of any module. You can view project task information in List View dashlets specific to the Project Tasks module (e.g. My Project Tasks dashlet), as well as List View dashlets based on other modules such as "My Calls". Clicking a project task's name from any dashlet will open the Project Tasks detail view. For more information on using dashlets and viewing project task records via dashlets, please refer to the Intelligence Pane documentation.




Viewing Project Tasks Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding projects and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the project task record's detail view by clicking the project's name in the report results. Please note that you can only directly access project task detail views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the

documentation.




Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

## Searching Project Tasks

The Project Tasks list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Project Tasks list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "create" in the name, regardless of how it starts or ends.

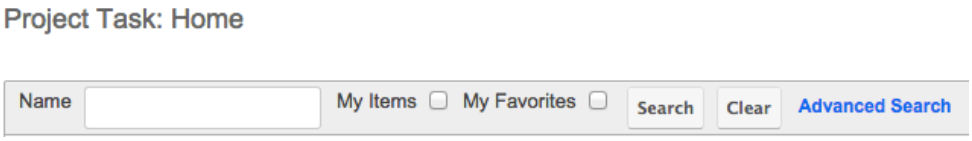
For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.
Note: Project Tasks is hidden from Global Search by default. The administrator must enable it for your use.

## Project Tasks Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.

The buttons and checkboxes available in Basic Search panel have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Items : Select this box to return only records assigned to you.




When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Items" and enter a project task name, Sugar will only return project tasks with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all project tasks to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see projects as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide.

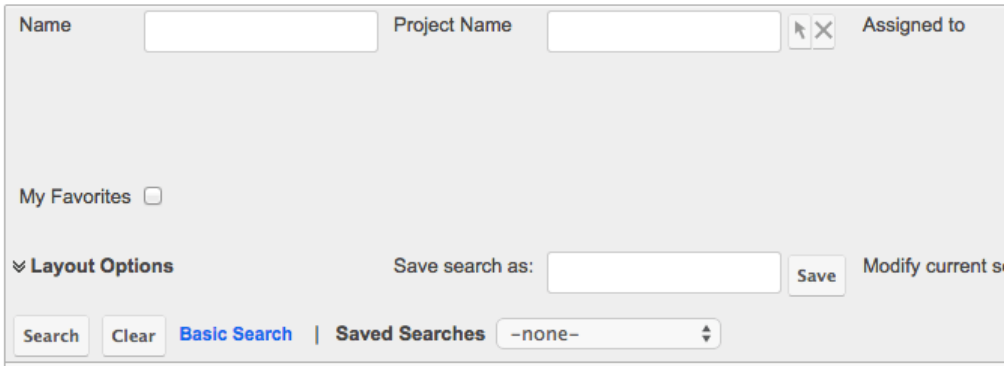
Administrators can configure what fields appear on the Project Tasks Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Project Tasks Advanced Search

Advanced Search offers a more in-depth search experience than Basic Search including additional fields, layout options, and saved search capability. From the Advanced search panel, you can click "Basic Search" for simplified searching.

The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the Layout Options section of the Search documentation.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section of the Search documentation. Project Task: Home




When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select a Project Name and enter in a project task name to search, Sugar will only return project tasks with a matching name that related to that specific project. When searching by a multiselect or dropdown field (e.g. "Assigned to"), however, Sugar will return records matching any of these selections. Once the search completes, the relevant results will populate in the list view below the search panel. To see all project tasks to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see project tasks as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide.

Administrators can configure what fields appear on the Projects Advanced Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Project Tasks List View

The Project Tasks list view displays all project tasks meeting the current search criteria and to which your user has access. You can view the basic details of each project task within the field columns. Please note that you will only be able to see project tasks as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and

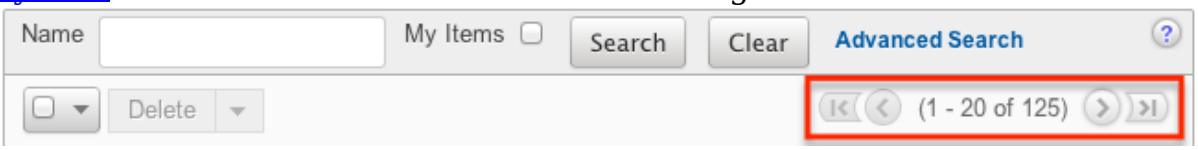
Roles documentation in the Administration guide.

You have the option to change what fields are displayed in list view by configuring your layout options in the Project Tasks Advanced Search. For more information on configuring your list view, please refer to the Layout Options section of the Search documentation. Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

### Project Tasks Pagination

List view displays the current search results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. To the right just below the search panel you can see which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of your current results.

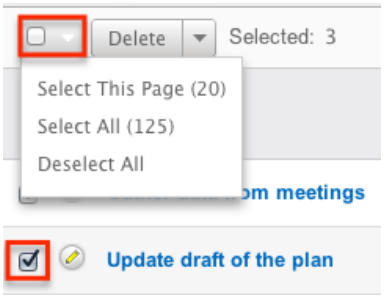
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.




### Project Tasks Checkbox Selection

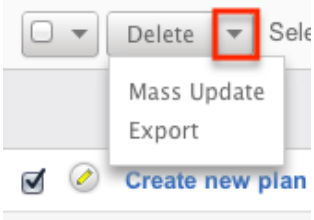
You can perform several actions on project task records directly from the list view by first selecting the desired records. To select individual project tasks on the Project Tasks list view, mark the checkbox on the left of each row. To select or deselect multiple project tasks on the list view, use the options in the checkbox dropdown menu:

- Select This Page : Selects all records shown on the current page of project results.
- Select All : Selects all records in the current search results across all pages of project results.
- Deselect All : Deselects all records that are currently selected.




Project Tasks Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.




The options in the Actions menu allow you to perform the following operations:

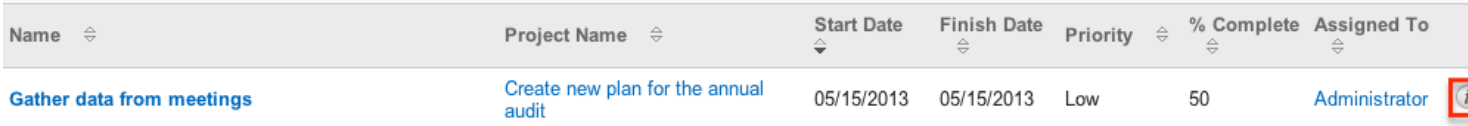
| Menu Item | Description |
|---|---|
| Delete | Delete one or more project tasks at a time |
| Mass Update | Mass update one or more project tasks at a time |
| Export | Export one or more project tasks to a CSV file |

Favorite Designation

Users have the option to mark project tasks records as favorites via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Project Tasks module tab. In the Project Tasks list view, the star on the left of each record's row is yellow once marked to indicate a favorite record. For more information on how to mark records as favorites, please refer to the Favoriting Projects Tasks section of this documentation.

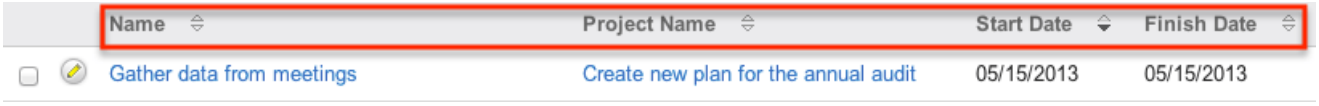
Project Tasks More Information

Additional details for each project task can be viewed by clicking the "i" icon to the far right of each list view row. This provides users a quick view of additional project task information in addition to what appears in the display column fields. The resulting pop-up window will show the Description field by default. The list of fields appearing here may only be configured through a code-level customization.




### Project Tasks Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time. You can also set a default order-by column using the layout options in Advanced Search. For more information on setting a default column sort, please refer to the Layout Options section of the Search documentation.




## Project Tasks Detail View

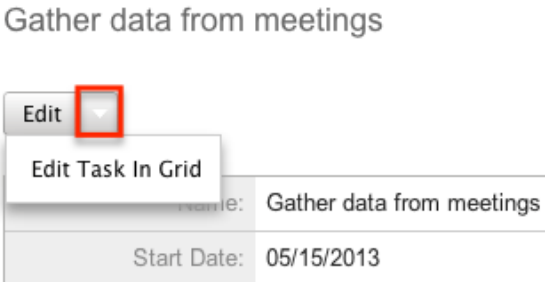
The Project Tasks detail view displays thorough project task information including all project task fields which are grouped by default into one panel. You can also view a project task's related records (Activities, History, etc.), which appear in subpanels beneath the project task fields. The detail view can be reached by clicking a project task's link from within Sugar including from the Project Tasks list view.

Please note that you will only be able to view a project task record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

### Project Tasks Actions Menu

The Actions menu on the top left of each project's detail view allows you to perform two actions on the current record. Administrator users can change the

action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the System documentation in the Administration guide.




The options in the Actions menu allow you to perform the following operations:

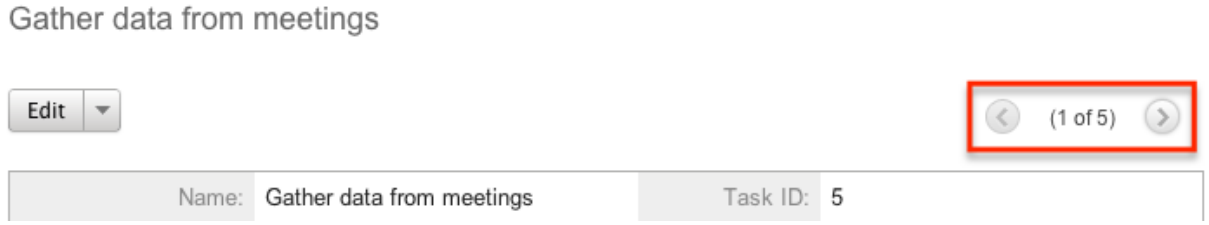
| Menu Item | Description |
|---|---|
| Edit | Edit this project task |
| Edit Task In Grid | View the project task's parent project's Grid and Gantt chart |

Favorite Designation

Users have the option to mark project tasks records as a favorite via the detail view as well as the list view. This allows users to designate records that are important or will be viewed often as they can easily be accessed via search or from the Project Tasks module tab. In the Project Tasks detail view, the star on the right of the record's name is yellow once marked to indicate a favorite record. For more information on how to mark records as favorites, please refer to the Favoriting Projects Tasks section of this documentation.

Next or Previous Project Task Record

On the upper right of the Project task's detail view, there are two buttons that allow you to page through each project in the Project Task list view's current search results. Clicking the Previous button displays the previous project task of the current search results while clicking the Next button displays the next project task of the current search results. The text in between shows which project task result you are currently viewing within the total number of current results.



## Project Tasks Subpanels

Beneath a project task's fields are subpanels containing containing related records from various modules, including different activities such as calls and meetings, as well as a history of notes and emails.
Please note that administrators can prevent users from moving subpanels to different locations in the detail view. For more information on preventing rearranging of subpanels, please refer to the System documentation in the Administration guide. Check with your system administrator if you are not able to rearrange your subpanels.

## Project Tasks Related Record Subpanels

The most common type of subpanels displayed on a project task's detail view contain the project task's related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. Out-of-the-box, the Project tasks module does not include any relationships to other modules that would cause a related record to be displayed in the field listing. However, a project task may be related to multiple notes which means that the related notes will be displayed in a subpanel beneath the fields. Please note that the Project Tasks module displays the Activities and History subpanels by default. Administrators can create new relationships between various modules in Sugar to create additional subpanels. For more information on creating relationships, please refer to the Studio documentation in the Administration guide.

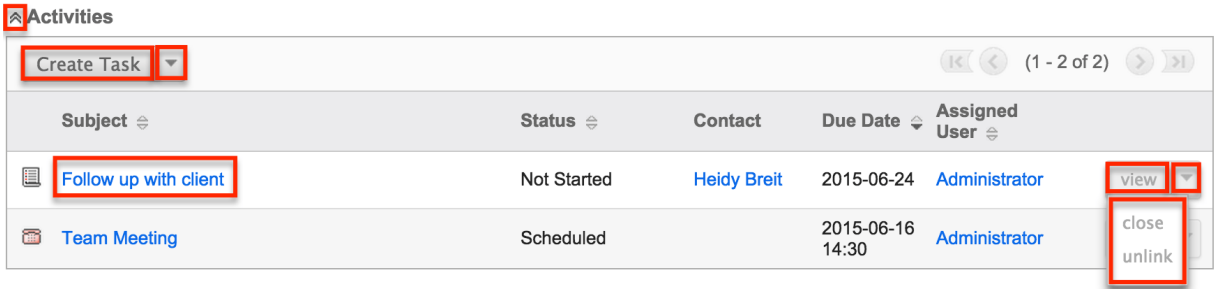
Users with administrator or developer access have the ability to change the fields (e.g. Subject, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.

Related record subpanels allow the following operations to be performed. Please note that administrators in Sugar can change the subpanel's Action menu to be displayed as separate buttons instead of a dropdown via Admin > System Settings. For more information, please refer to the System documentation in the Administration guide.

- To view the details of a related record, click the record's name in the subpanel or choose "View" from the Actions menu on the far right of the record's row to open it in record view.
- To relate a new record to the project task, choose the Create option (e.g. Create Task) from the subpanel's Action menu, then complete the record view

layout and click "Save".

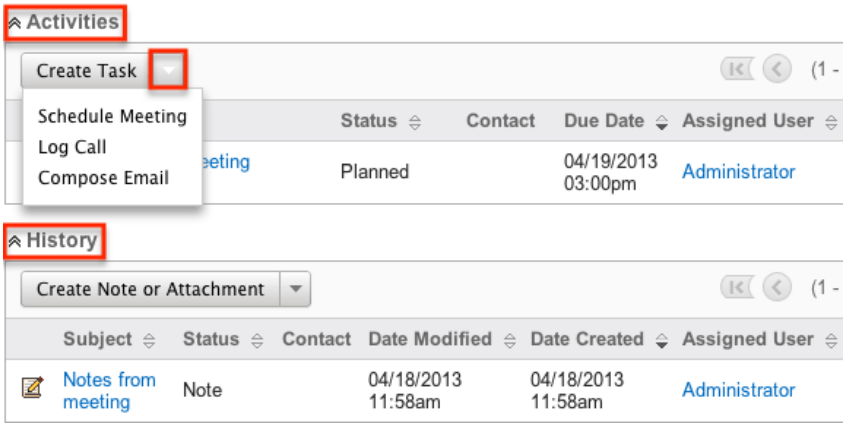
- To delete the project task's relationship to a record, choose "unlink" from the Actions menu on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To close an activity (e.g. Tasks) from the Activities subpanel, choose "close" from the Actions menu on the far right of the record's row. This moves the record to the History subpanel within the Project Tasks record.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.




Please note that administrators can prevent users from moving subpanels to different locations in the detail view. For more information on preventing rearranging of subpanels, please refer to the System documentation in the Administration guide. Check with your system administrator if you are not able to rearrange your subpanels.

Project Tasks Activities and History Subpanels

The Activities subpanel lists open or upcoming tasks, calls, and meetings that are related to the project task record. Once the activities have taken place or are completed, they will instead appear within the History subpanel. The History subpanel also includes notes and emails associated with the project task record. For more information on the history and activities subpanel, please refer to the User Interface documentation.



## Project Tasks Gantt Chart

The Projects module includes a grid and Gantt chart to allow you to visualize, track, and easily make changes to your project tasks all in one place. This menu is accessible from each project's detail view through the Actions Menu or the Project Tasks subpanel. The page consists of a grid which shows each project task, as well as information on the timing, % complete, preceding tasks, and who is responsible for completing the task. Project tasks on the grid can be edited by clicking on the specific cell and making in-line changes. Whole rows can be selected by clicking the Task ID number in the ID column on the far left column. The Gantt chart shows a timeline of each task represents which tasks are being worked on at a given time.




### Gantt Chart Toolbar

The Gantt Chart Toolbar allows you to make changes to both what tasks are showing on the grid, but also how they are displayed. The icons and menus perform the following actions, from left to right:

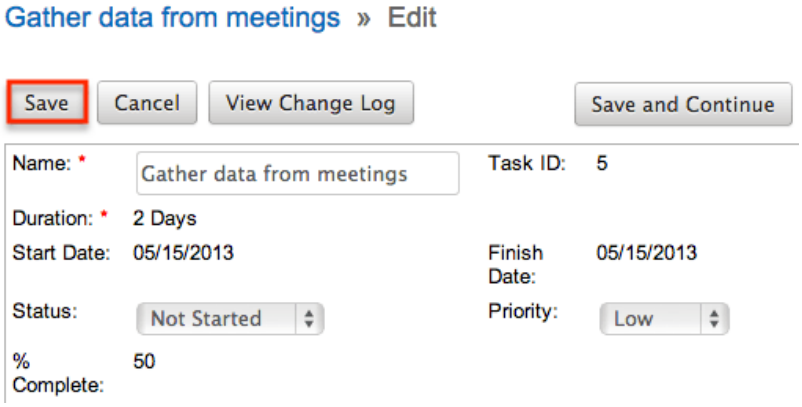
| Toolbar Option | Description |
|---|---|
| Add New Row | Adds a new row to the end of the task list, unless a row is selected, when the button will add the row above the selection |
| Indent Row | When a row is selcted, this button will make it a subordinate function of the above row, causing any subordinate tasks to be grouped under the parent task |
| Outdent Row | When a row is selcted and already indented, this button will move it out from being a subordinate function of the above row and making it its own task |

| | |
|---|---|
| Copy Row | When a row is selected, the Copy button will allow the data in the row to be placed in another row while keeping the origional in tact |
| Cut Row | When a row is selected, the Cut button will delete the entire row, but allow it to be pasted into another as an ensuing action |
| Paste Row | Adds currently copied or cut row to the end of the task list, unless a row is selected, when the button will place the row above the selection |
| Delete Row | When a row is selected, the Delete button will remove the entire row and delete the project task |
| Expand All | This button will affect the entire grid by expanding all hidden rows created by indenting to show all rows on the grid |
| Collapse All | This button will affect the entire grid by collapsing all visible indented rows on the grid |
| Save | Saves all changes to the grid and updates the related project task records |
| Week View | Changes the Gantt chart to show one week of events at a time |
| 2 Week View | Changes the Gantt chart to show two weeks of events at a time |
| Month View | Changes the Gantt chart to show one month of events at a time |
| View... | Dropdown list to provide filters to change which project tasks are showing on the grid |
| Export to PDF | Exports a PDF from Sugar containing the information shown in the task grid |
| Resource Report | Opens the Resource Report popup |
| Grid | Changes the view of the page to only show the task grid and releted toolbar buttons |
| Gantt | Changes the view of the page to only show the Gantt chart and releted |

| | |
|---|---|
| | toolbar buttons |
| Grid/Gantt | Changes the view of the page to show both the task grid and Gantt chart |

## Editing Project Tasks

Project Tasks may be edited at any time to update or add information to the record. You can make changes to existing project task records via the Gantt chart and Project Tasks edit view. Edit view is available within the Project Tasks module and includes all of the Project Task fields you should need.

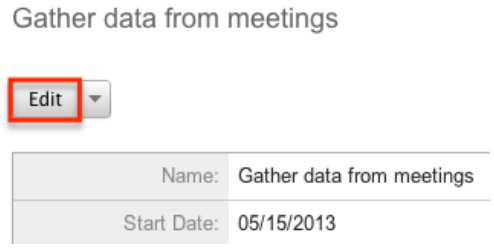



Please note that your ability to edit project tasks in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure the Project Tasks edit view via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

### Editing Project Tasks Via Detail View

You can edit project tasks via the Detail View by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve your changes.



Editing Project Tasks Via Gantt Chart

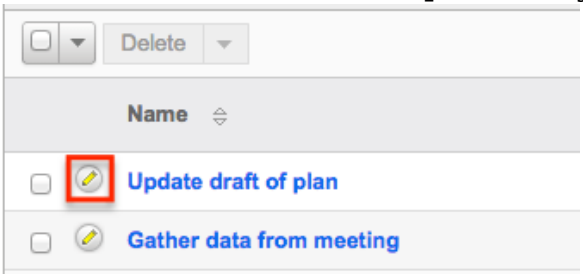
Project Tasks can be edited one at a time via the task grid and Gantt Chart. The Gantt chart can be accessed via the Projects detail view and Project Tasks detail view . Project Task fields can be edited by clicking on the field, either if it is empty or if it contains existing data, and edits can be made directly inline on the grid. Selecting the entire row can be done by clicking the ID number for the row of each project task. Multiple tasks can be selected by holding the Shift key on your keyboard while clicking.

The following fields can be edited from the task grid and Gantt chart:

- % Complete
- Task Name
- Duration
- Start
- Finish
- Predecessors
- Resource
- Actual Duration

Editing Project Tasks Via List View

You can edit project tasks via the list view by clicking the Pencil icon to the left of each project task's name. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve your changes.




## Deleting Project Tasks

If a project task is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the project's Gantt chart or the Project Tasks list view. Deleting via the Gantt chart allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting projects will not delete related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records if

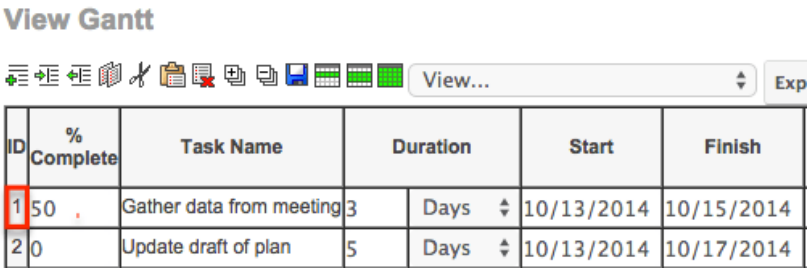
necessary.

Please note that your ability to delete project tasks may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

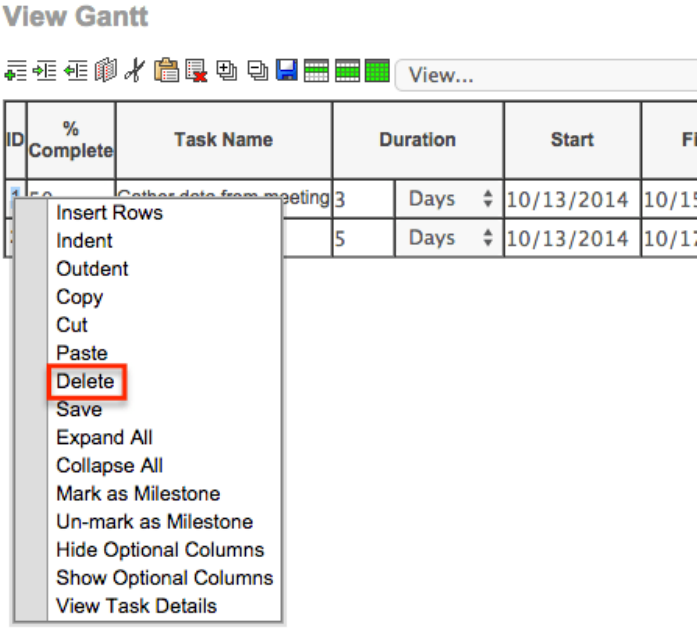
## Deleting Project Tasks Via Gantt Chart

Use the following steps to delete a project task via the Gantt chart:

1. Navigate to the project's Gantt chart
2. Select the project task's row by clicking on the ID number for the task




3. Right click on the selected row and select the "Delete" option from the action menu, or click the "Delete" button from the Gantt toolbar

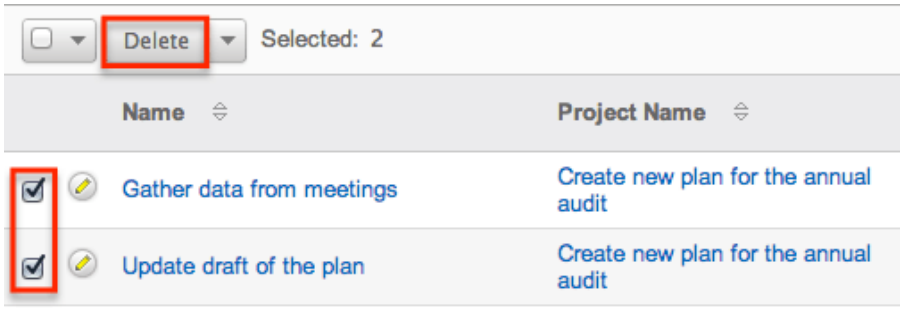



4. Save the Gantt chart to confirm the change to the project.

## Mass Deleting Project Tasks Via List View

Use the following steps to delete one or more project tasks via the list view:

1. Navigate to the Project Tasks list view by clicking the triangle on the Projects module tab and selecting "View Project Tasks".
2. Use the Basic or Advanced Search to find the project task records you wish to delete.
3. Select the desired project tasks individually or using the checkbox dropdown's options.
4. Choose "Delete" from the Actions menu.



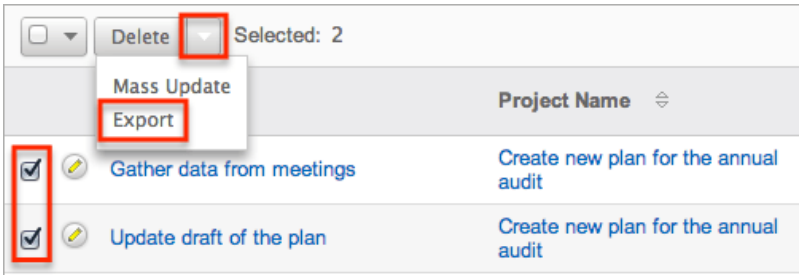

5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Due to PHP memory limitations on the server, there may be occasions when the application times out while deleting a large number of project task records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

## Exporting Project Tasks

Sugar's Export option allows users to download all fields for the selected project tasks to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Project data with other software such as Microsoft Excel. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of project tasks. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Project tasks may be exported from the Project Tasks list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for project tasks and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.




Please note that your ability to export projects from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

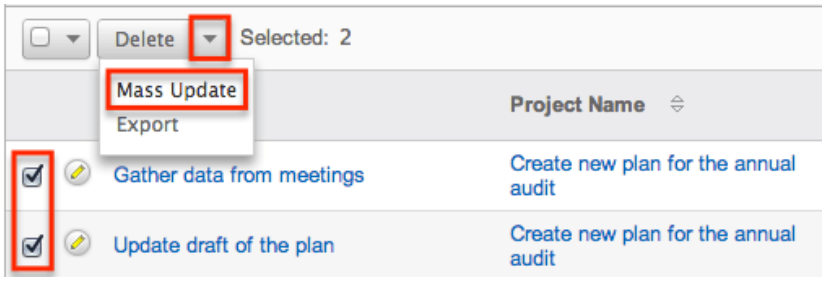
## Mass Updating Project Tasks

Mass Updating allows users to make the same change to multiple project tasks at once from the Project Tasks list view. Users with administrator or developer access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide. Due to the PHP memory limitations on the server, there may be occasions when the application times out while mass updating a large number of project tasks. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

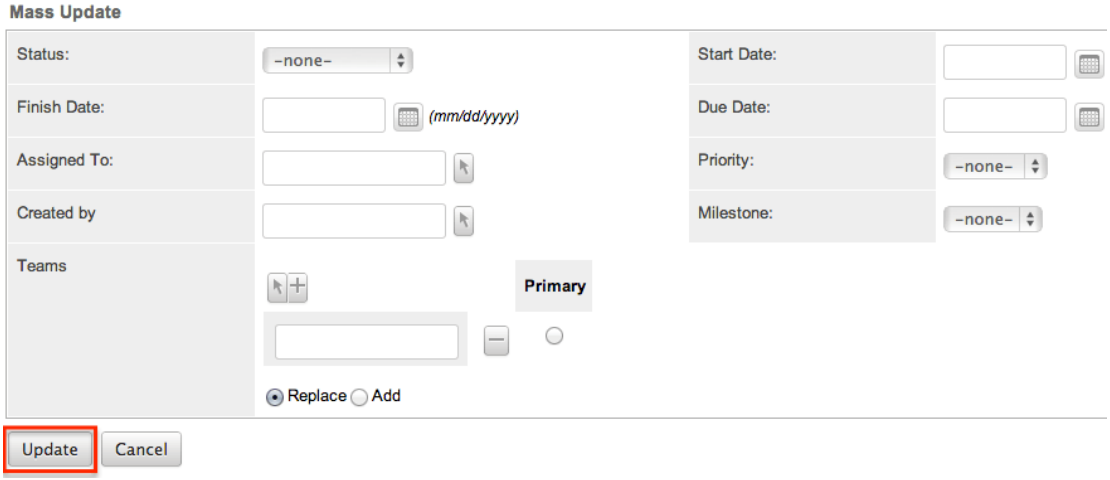
Please note that your ability to mass update project tasks may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

Use the following steps to mass update projects from the list view:

1. Navigate to the Project Tasks list view by clicking the triangle on the Projects module tab and selecting "View Project Tasks".
2. Use the list view's Basic or Advanced Search to find project tasks you wish to modify.
3. Select the desired project tasks individually or using the checkbox dropdown's options.
4. Choose "Mass Update" from the Actions menu.




5. Scroll to the Mass Update panel and set values for the fields you wish to alter. Note: For the Teams field, use "Replace" to remove existing team assignments before adding those specified here. Use "Add" to add the teams specified here to any existing team assignments.




6. Click "Update" to save the changes to all of the currently selected project tasks.

## Favoriting Project Tasks

Each Sugar user has the option to designate their own favorite project tasks which are important or will be viewed often so that they can easily be accessed via search or from the Project Tasks module tab. Once records are marked as favorites, use the My Favorites checkbox in the Project Tasks Basic or Advanced Search to retrieve your favorites or select from your most recent favorites directly from the .

### Favoriting Via List View

Use the following steps to mark records as favorites via the Project Tasks list view:

1. Navigate to the Project Tasks list view by clicking "View Project Tasks" from the Projects module tab.
2. Use the Basic or Advanced Search to find the Project Tasks records you wish to mark as favorites.

3. Mark the star icon on the left of each desired record's row.
4. To remove the record as a favorite, click the star again to revert it to gray.

### Favoriting Via Detail View

Use the following steps to mark records as favorites via the Project Tasks detail view:

1. Navigate to a Project Task's detail view.
2. Click the star icon to the right of the record's name in the upper left of the detail view to designate it as a favorite.
3. To remove the record as a favorite, click the star again to revert it to gray.

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# Reports

## Overview

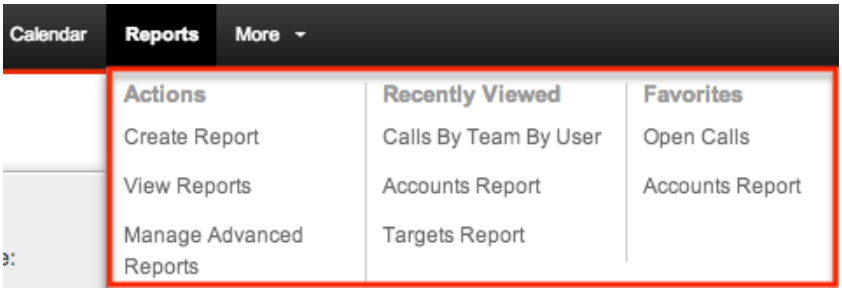
Sugar's Reports module allows users to build, generate, and manage reports for modules such as Accounts, Contacts, Calls, etc. Reporting is a valuable tool in Sugar as users can gather key data from various modules to generate vital information for their organization. There are four types of reports (Rows and Columns Report, Summation Report with Details, Summation Report, Matrix Report) available that can be generated in Sugar. This documentation will cover how to use the Reports module to build, generate, and manage reports, as well as the various actions and options available from within the module.

Note: Some of the following examples contain steps to create Opportunity reports. For version 7.6.x, customers with Revenue Line Items enabled should adapt the steps to target the Revenue Line Items module.

## Reports Module Tab

The Reports module tab is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access the Reports list view. You may also hover on the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of reports you last viewed in the module. The Favorites menu displays the list of reports you most recently marked as favorites in

the module.




The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|---|---|
| Create Report | Opens the report wizard to create a new report |
| View Reports | Opens the list view layout to search and display reports |
| Manage Advanced Reports | Opens the Advanced Reports tab to create and view advanced reports |

## Report Types

There are four types of reports (Rows and Columns Report, Summation Report, Summation Report with Details, Matrix Report) available for users to create in Sugar. Please note that each report type will provide users with key information for records that meet the specified criteria but will display the report results in different layouts.

### Rows and Columns

The Rows and Columns report is the most basic report to create out of the four report types. The report results will display the data in a simple rows and columns format displaying values for the selected display column fields for all records meeting the specified criteria. Please note that only Rows and Columns-type reports can be exported as a .CSV (comma-separated values) file in Sugar. For more information on creating a Rows and Columns report, please refer to the Rows and Columns Report section of this documentation.

### Summation

The Summation Report provides computed data based on the selected fields for records meeting the specified criteria. You can group the report based on one or

more fields from the target or related module. The report's result will display the data in groups, summarized using computed derivatives (e.g. SUM, AVG, MAX, MIN) from numeric-type field values (e.g. opportunity amount, amount, etc.) as well as weighted amounts. Summation Reports can be viewed in a chart format and displayed as a Sugar Dashlet on your Home page as well.For more information on creating a Summation Report, please refer to the Summation Report section of this documentation.

### Summation Report with Details

The Summation Report with Details is a combination of the Summation-type and Rows and Columns-type report as you can group the data, get the total count of records, and choose display columns (e.g. Contacts Name, Account Name, Email Address, etc.) as well. You can group the report based on one or more fields from the target or related module. Summation Report with Details can be viewed in a chart format and displayed as a Sugar Dashlet on your Home page. For more information on creating a Summation Report with Details, please refer to the Summation Report with Details section of this documentation.

### Matrix

The Matrix Report is also similar to the Summation-type report as it provides an overview of the computed data and displays the total summary count. The report results are displayed in a grid table with row and column headers. The numeric field values for all display summaries will appear on the table along with the grand total amounts for each row and column. Matrix Reports can be viewed in a chart format and displayed as a Sugar Dashlet on your Home page. For more information on creating a Matrix Report, please refer to the Matrix Report section of this documentation.

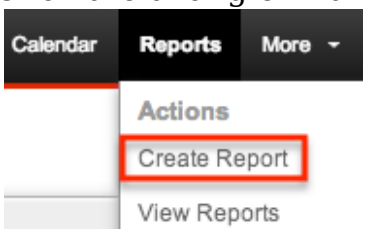
## Creating Reports

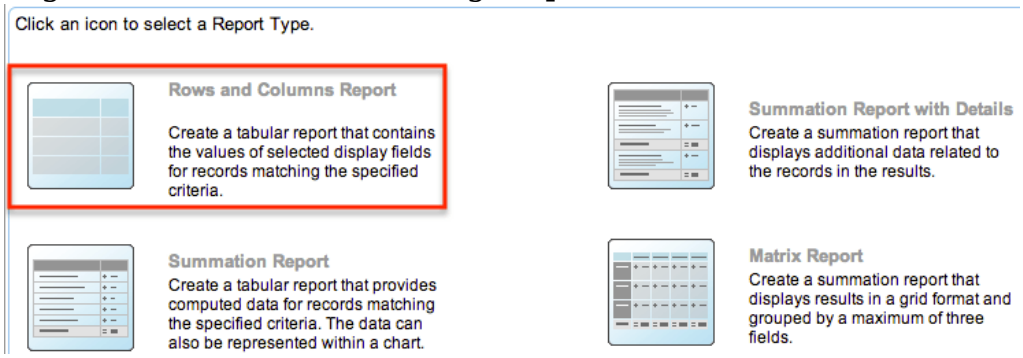
There are various types of reports (e.g. Rows and Columns Report, Summation Report with Details, Summation Report, Matrix Report) you can create via the Reports module. When you select "Create Report" from the Actions menu of the Reports module tab, the first step of the Report Wizard is to select the report type. Depending on the report type you select will determine the steps you will have to complete to create the report. The following sections will cover creating the four different report types via the Reports module.

### Rows and Columns Report

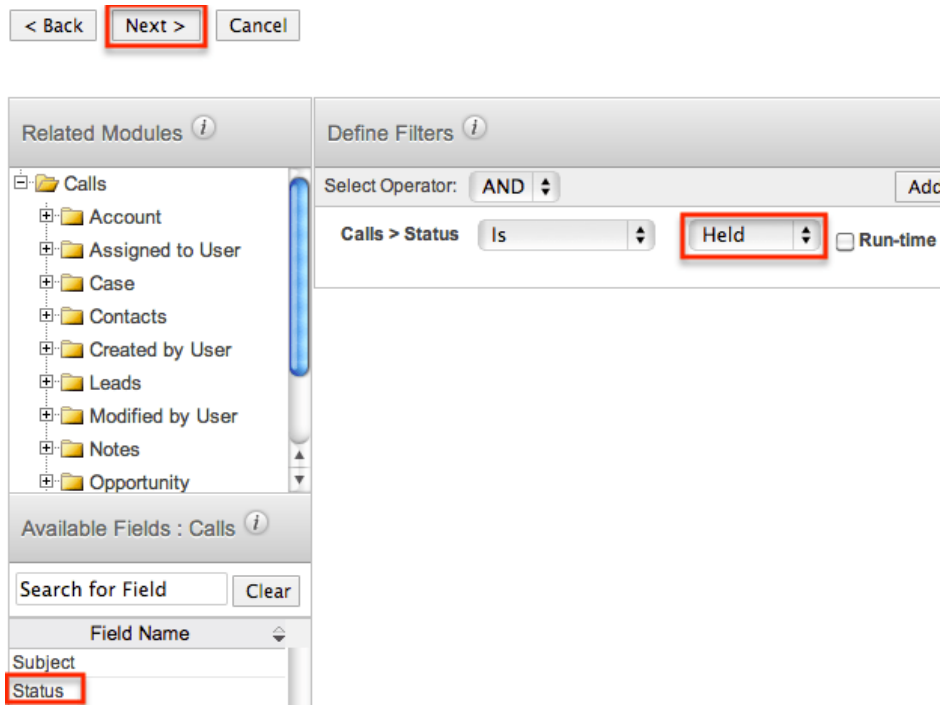
Out of the four report types, the Rows and Columns report is the most basic one to create in Sugar. Users can simply define filters to determine which records the report will include or exclude then choose the fields (e.g. Name, Email Address, etc.) they would like displayed in the report result. The Rows and Columns report creates a tabular report containing the values of selected display column fields for all records meeting the specified criteria.Please note that only Rows and Columns-type reports have the ability to be exported to a CSV file in Sugar.

The following steps cover creating a Rows and Columns report for calls with a status of held as an example:

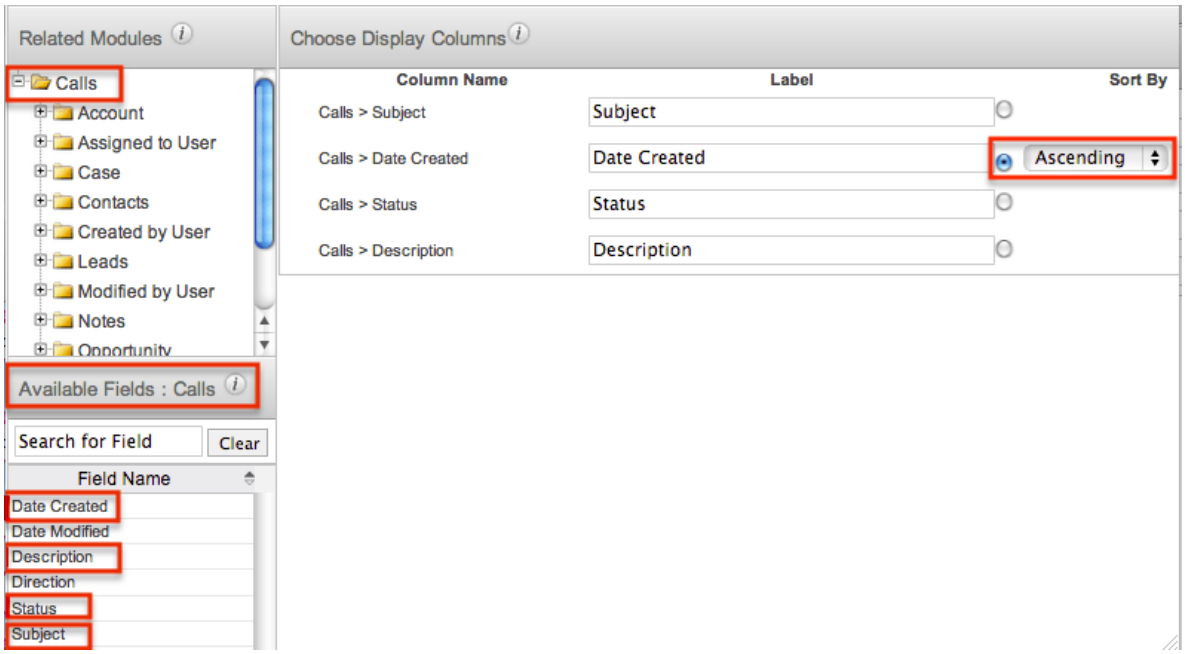
1. Click the triangle in the Reports module tab and select "Create Report".


2. Choose "Rows and Columns Report" as the report type and "Calls" as the target module in the following step.


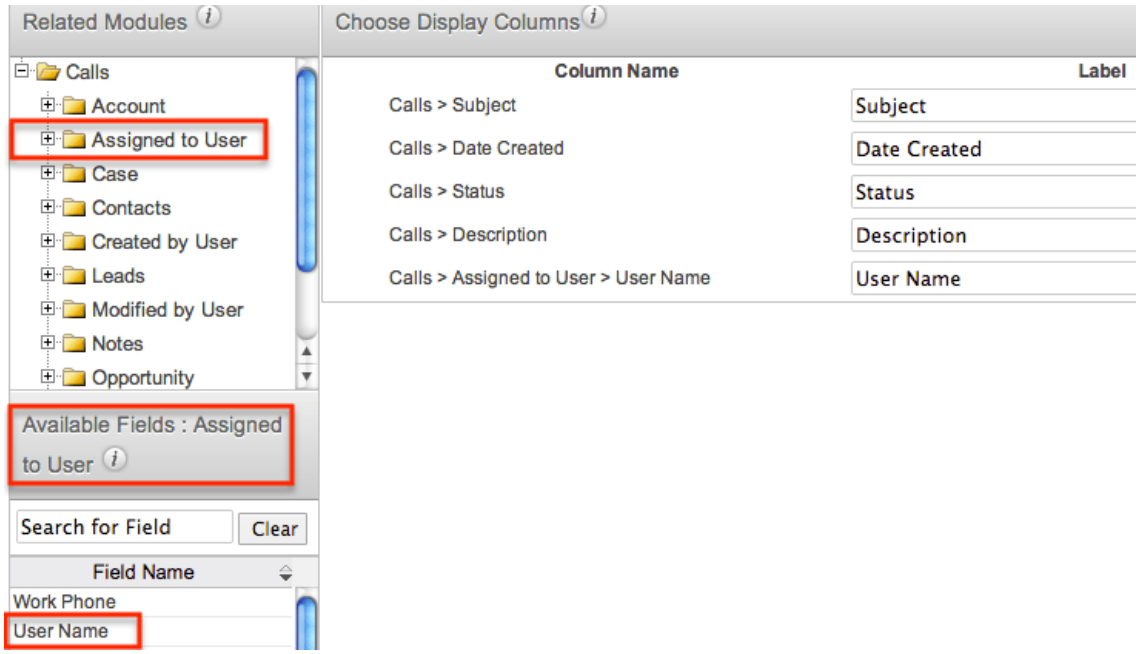
3. To filter on a field related to the target module, select it from the Available Fields list on the bottom left, and it will be added to the list of filters. We will select "Status" to filter the report based on call records already held. Click "Next".
    - For more information on report filters, please refer to the Report Filters section of this documentation.




4. On the Choose Display Columns step, select the fields you would like included in the report result from the Available Fields list then click "Next". The following fields will be added to the report: Subject, Status, Description, Date Created, User Name, Contacts Name, and Account Name.
    - For more information on selecting display column fields, please refer to the Report Display Columns section of this documentation.
5. Select "Subject", "Date Created", "Status", and "Description" in the Available Fields : Calls list, as these are direct fields of the Calls module. By default the target module fields are displayed in the Available Fields list.
    - Note: You can designate the generated report to be sorted by a specific display column field in either ascending or descending order. Simply mark the radio button next to the field label then select "Ascending" or "Descending" in the corresponding dropdown list.



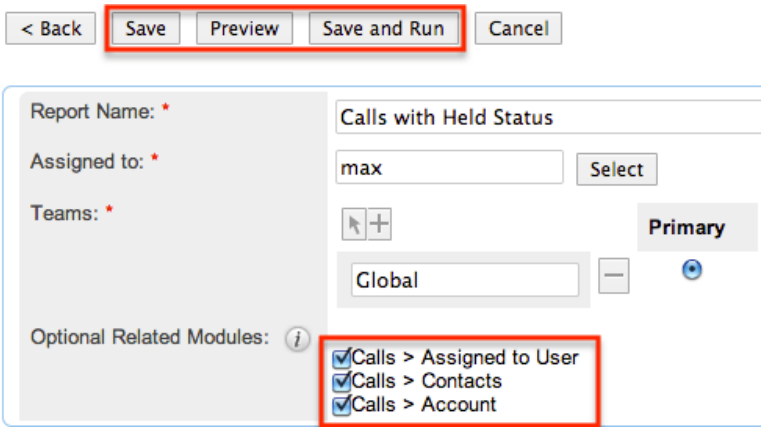

6. For the User Name field, click "Assigned to User" from the Related Modules list at the top left then select "User Name" from the Available Fields : Assigned to User list.
    - Note: User names are stored in their own table in the database and are related to the modules in Sugar. So even though the assigned user field appears in various module layouts, they are not direct fields of those modules.



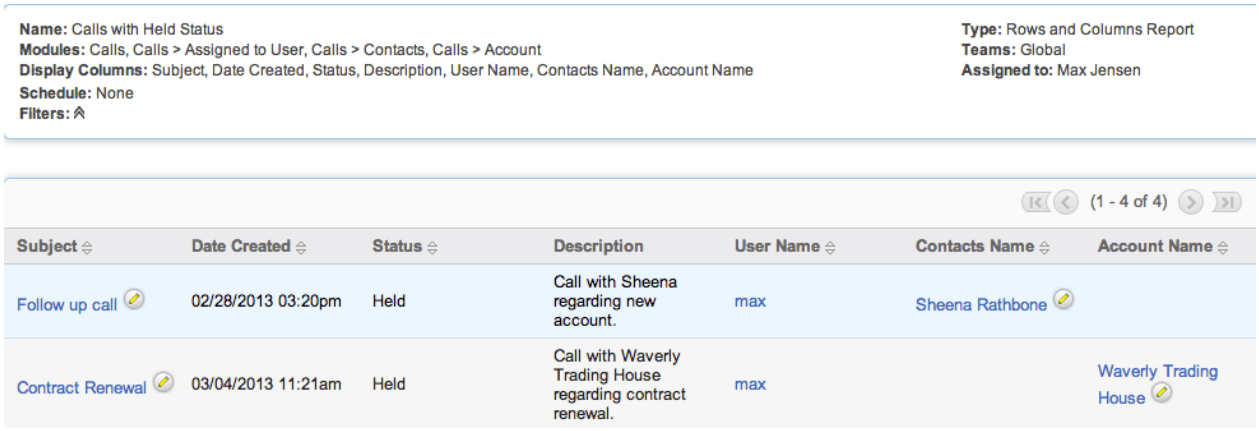

7. For the Contacts Name field, click "Contacts" from the Related Modules list then select "Name" from the Available Fields : Contacts list.
    - By default, the label for the Name field will display "Name", but you can override the label to "Contacts Name" to differentiate the field between accounts and contacts. For more information on changing display column labels, please refer to the Changing Display Column Labels section of

this documentation.

8. For the Account Name field, click "Account" from the Related Modules list then select "Name" from the Available Fields : Account list.
    - Change the label for the Name field to display "Account Name". For more information on changing display column labels, please refer to the
9. To place the fields in different order on the report, drag and drop the field rows within the display column list.
    - The first field (Subject) on the display columns list represents the first column of the report, the second field (Date Created) is the second column, and so forth. For more information on changing the display column order, please refer to the Changing Display Column Order section of this documentation.
10. Click "Next" once all appropriate fields have been added.
11. On the Report Details step, enter the report name and assign it to the appropriate user and team.
    - Please note that if you want your report to include all held calls whether or not they have an assigned user, related contact, or account, you will need to mark the Optional Related Modules boxes. For more information on marking related modules as optional, please refer to the Optional Related Modules section of this documentation.




12. Once the report details are entered, click "Save and Run" to save and generate the report immediately.
    - Clicking the Preview button allows you to preview the report prior to saving.
    - Clicking the Save button will save the report, but not run it immediately.

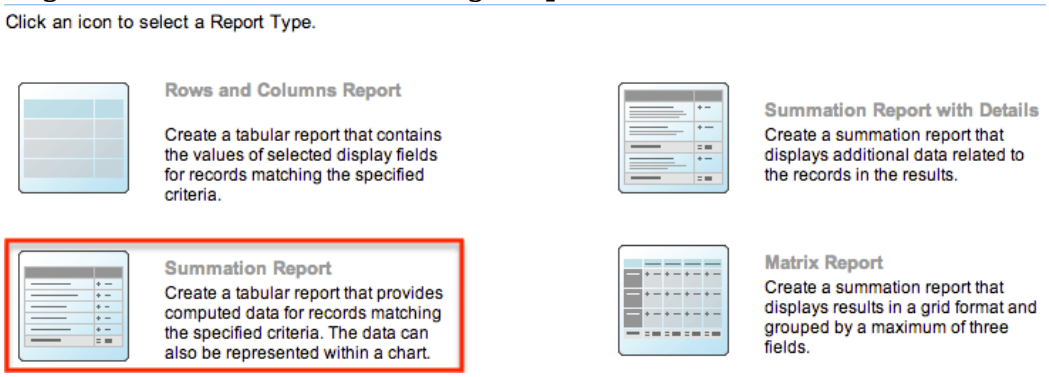



## Summation Report

The Summation Report allows data to be grouped and provides computed data for records that meet the specified criteria. You can choose an unlimited number of group-by columns to group the data in the report and can define group-by data for related modules as well. You can also drag and drop the group by fields to a different order in the Define Group By step to change the layout in the report results. Please note that the Summation Report does not provide detailed information like Summation Report with Details and will not include display columns in the report.

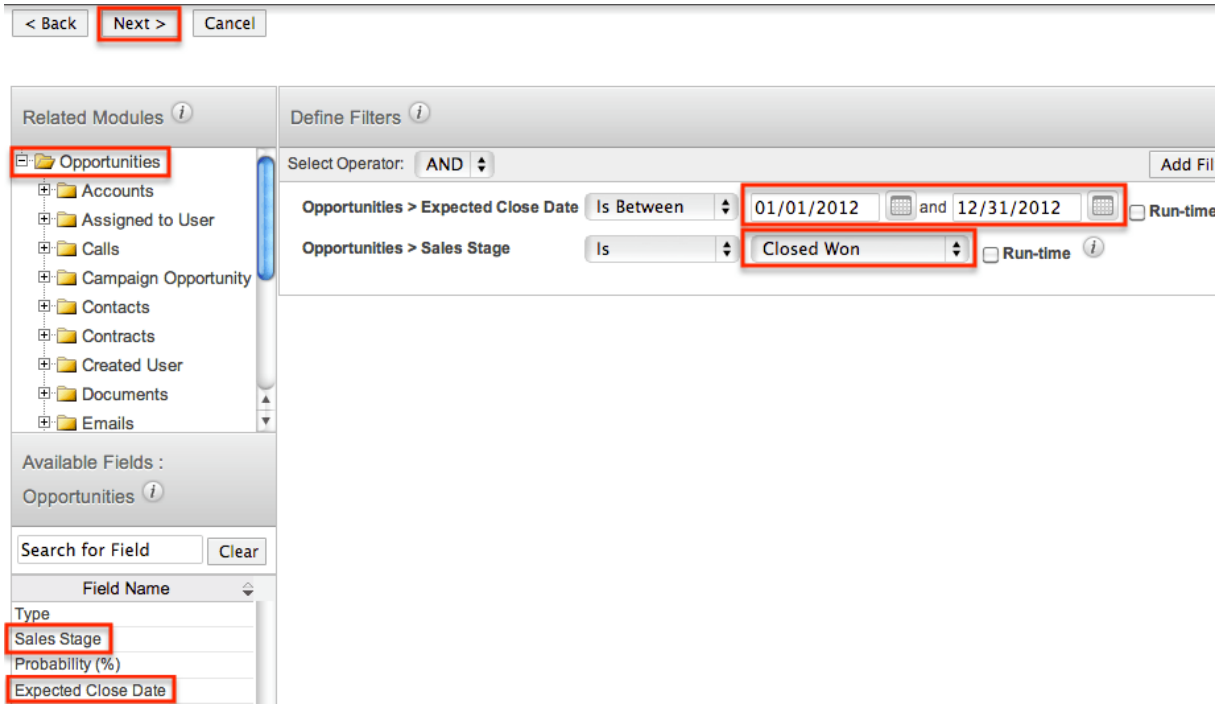
The following steps cover creating a Summation Report for total closed won opportunities in 2012 by user as an example:

1. Navigate to the Reports module and select "Create Report".
2. Choose "Summation Report" as the report type and "Opportunities" as the target module in the following step.

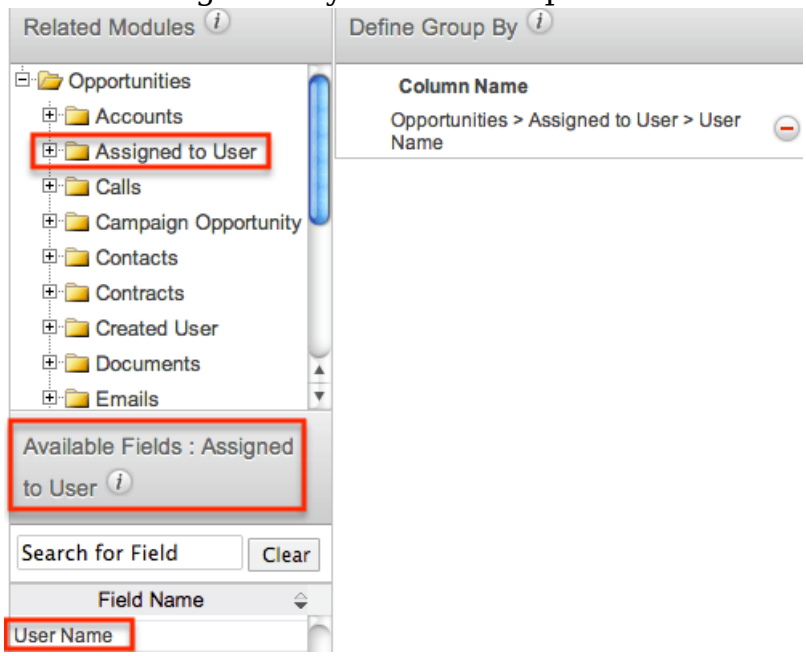



3. To filter on a field related to the target module (Opportunities), select it from the Available Fields list on the bottom left and it will be added to the list of filters. We will select "Expected Close Date" and "Sales Stage" to filter the report based on closed won opportunities for 2012. Click "Next".
    - For more information on report filters, please refer to the Report Filters

section of this documentation.

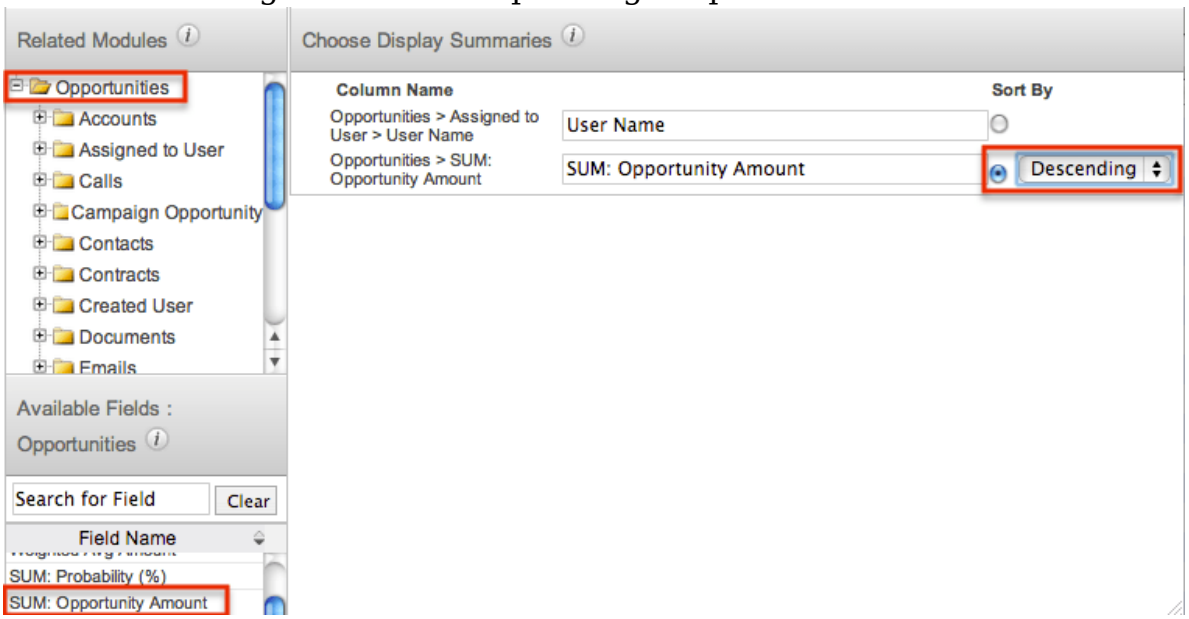



4. On the Define Group By step, select the field(s) you would like the records in the report grouped by, then click "Next". We will add "User Name", which will group the closed won opportunity records by assigned user.
    - Please note that you will have to click the related Assigned to User module to select the User Name field as user names are not direct fields of the Opportunities module.
    - Note: If you have multiple group-by fields, you can drag and drop the displayed field paths in the Define Group By section to change the ordering and layout in the report result.

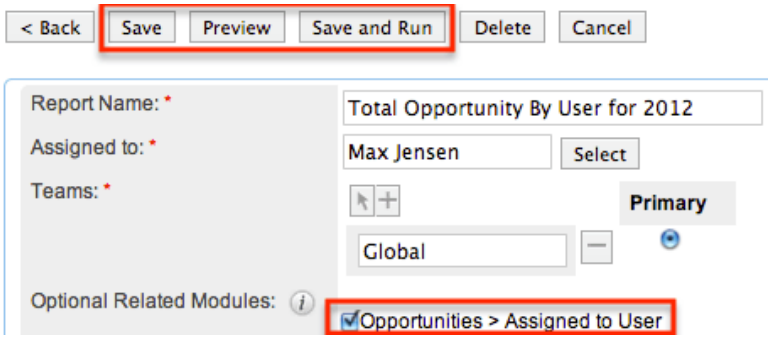



5. On the Choose Display Summaries step, select how you would like the opportunity amounts summarized on your report then click "Next". We will

select "SUM: Opportunity Amount", which will add all the closed won opportunity amounts in 2012 per user and display the total for each grouping.
    - Please note that the field(s) you selected in the Define Group By step is automatically included in the Choose Display Summaries step.
    - Note: You can designate the generated report to be sorted by a specific field column in either ascending or descending order. Simply mark the radio button next to the field label then select "Ascending" or "Descending" in the corresponding dropdown list.

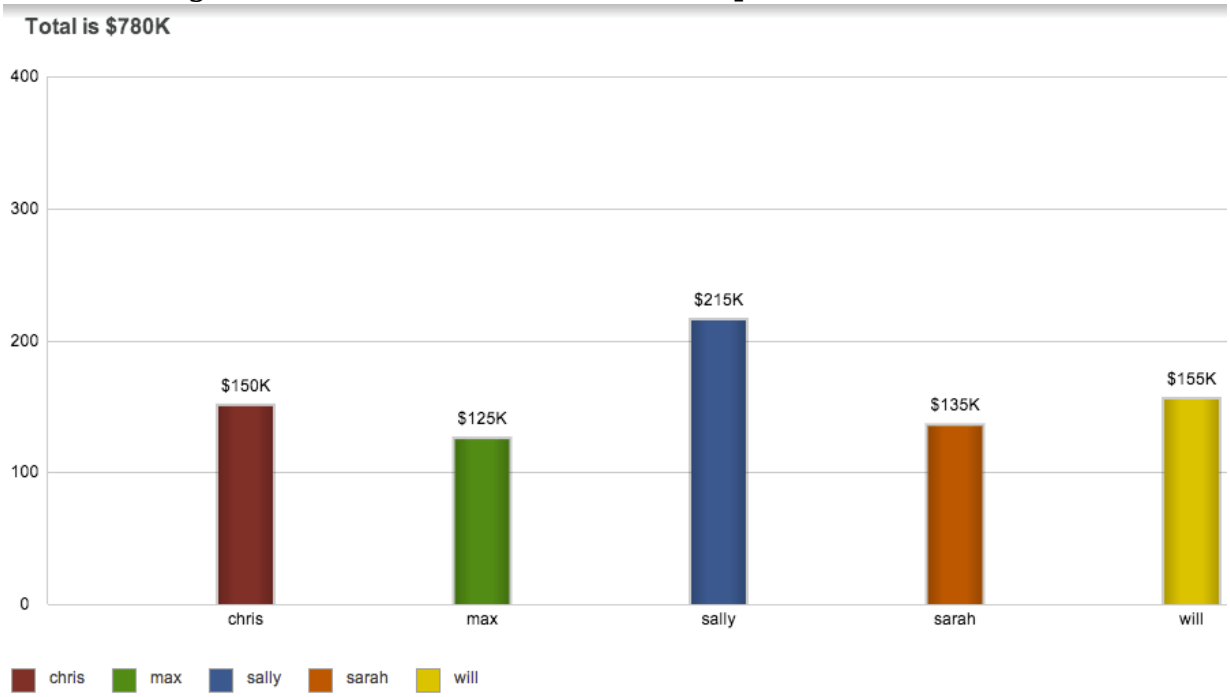



6. On the Chart Options step, select the chart type you want displayed in the report as well as how the data will be summarized on the chart, then click "Next". We will select "Vertical Bar" as the chart type, summarized by the total opportunity amount per user.
    - For more information on setting up the chart options, please refer to the
7. On the Report Details step, enter a name for the report and assign it to the appropriate user and team.
    - Please note that if you want your report to include all closed won opportunities whether or not it is assigned to a user, you will need to mark the Optional Related Modules box. For more information on marking related modules as optional, please refer to the Optional Related Modules section of this documentation.




8. Once the report details are entered, click "Save and Run" to save and generate the report immediately.

- Clicking the Preview button allows you to preview the report prior to saving.
- Clicking the Save button will save the report, but not run it immediately.



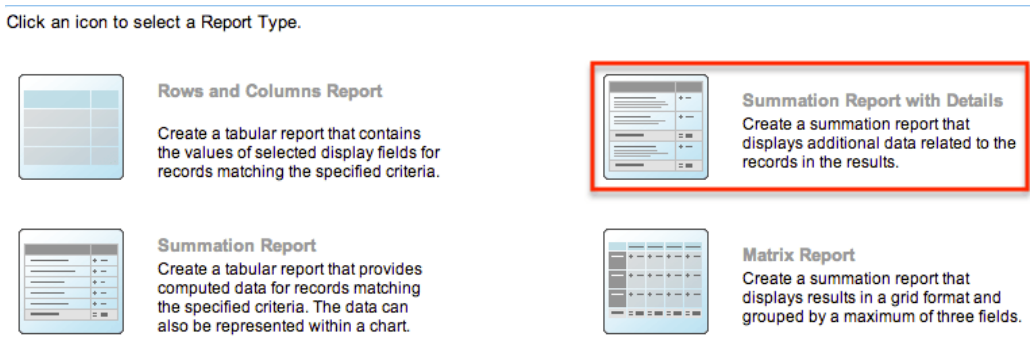

| User Name | SUM: Opportunity Amount |
|---|---|
| chris | $150,000.00 |
| max | $125,000.00 |

## Summation Report with Details

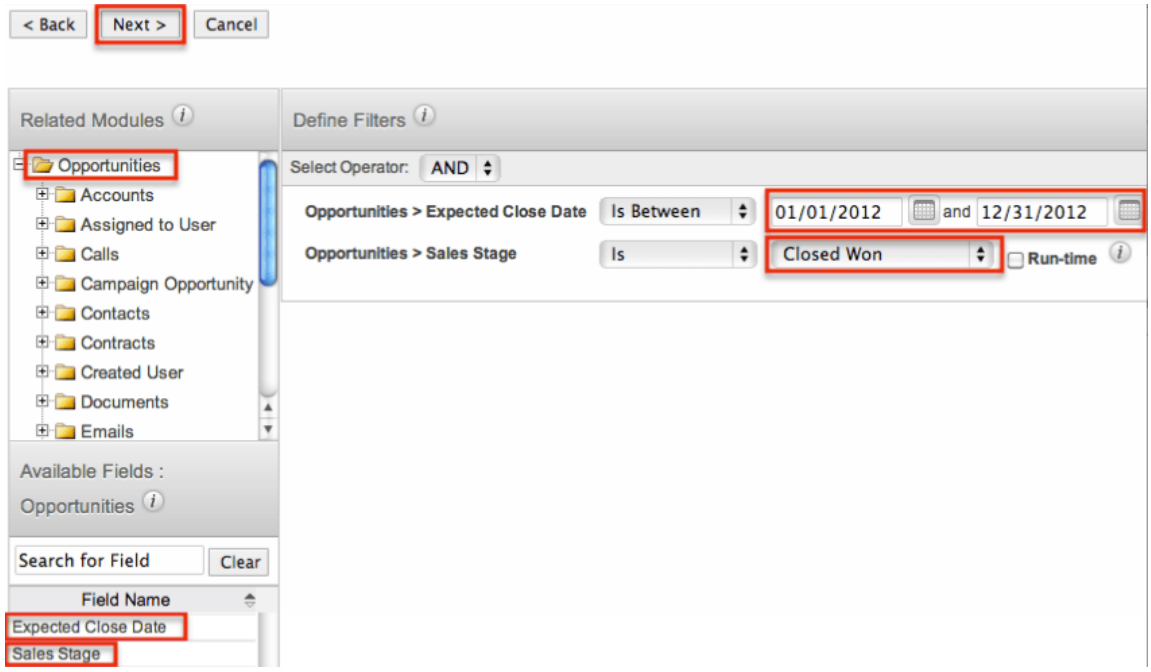
The Summation Report with Details allow data to be grouped and summarized with detailed information related to records in the report. You can group the report based on one or more fields from the target or related module. Grouping the report by particular fields allows the report results to display data in categories by the specified field values. You can also drag and drop the group-by fields to a different order in the Define Group By step to change the layout in the report results.

The following steps cover creating a Summation Report with Details for closed won opportunities in 2012 grouped by month as an example:

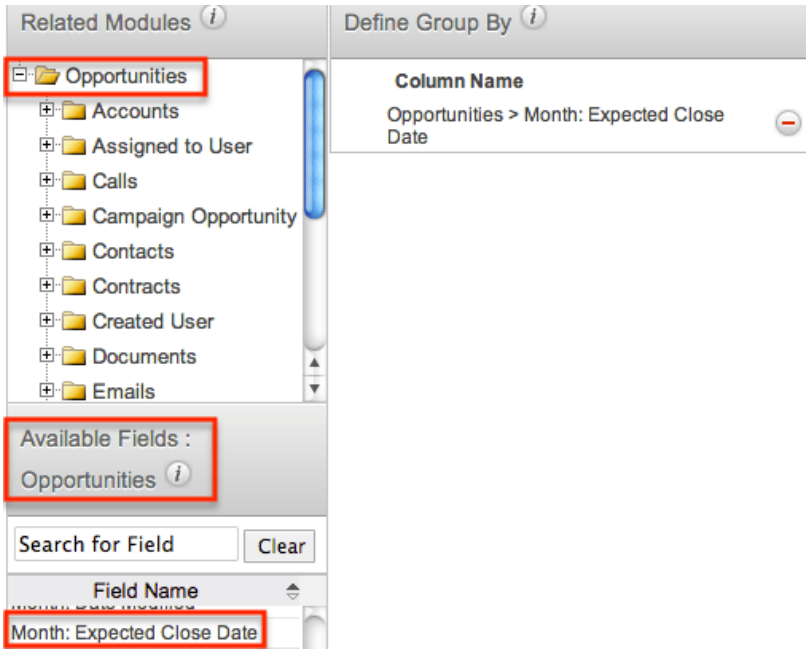
1. Navigate to the Reports module and select "Create Report".
2. Choose "Summation Report with Details" as the report type and "Opportunities" as the target module in the following step.



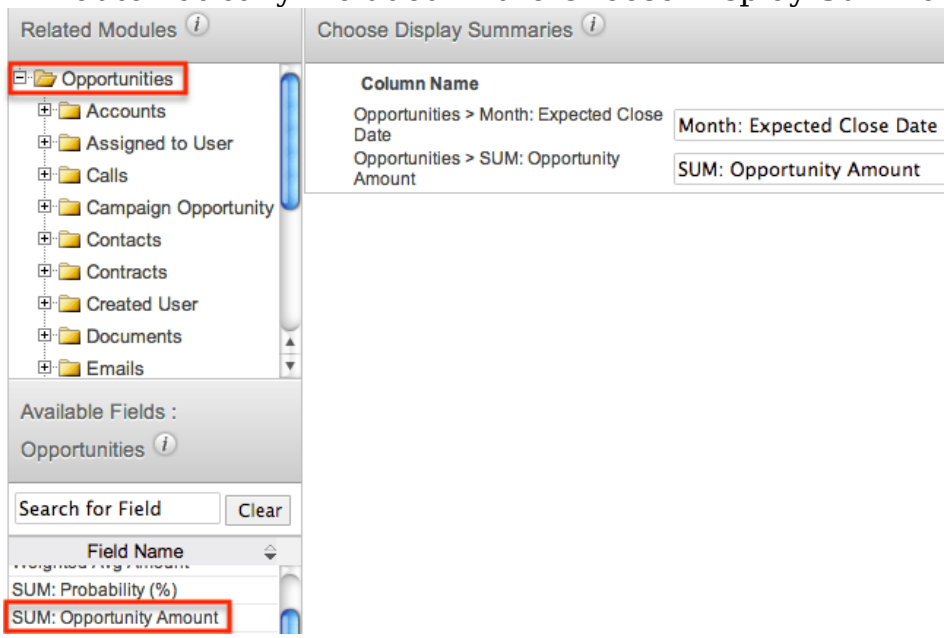

3. To filter on a field related to the target module (Opportunities), select it from the Available Fields list on the bottom left, and it will be added to the list of filters. We will select "Expected Close Date" and "Sales Stage" to filter the report based on closed won opportunities for 2012. Click "Next".
    - For more information on report filters, please refer to the Report Filters section of this documentation.




4. On the Define Group By step, select the field(s) you would like the records in the report result grouped by then click "Next". We will add "Month: Expected Close Date", which will group the opportunity records based on the month of the expected close date.
    - Note: If you have multiple group-by fields, you can drag and drop the displayed field paths in the Define Group By section to change the ordering and layout in the report result.

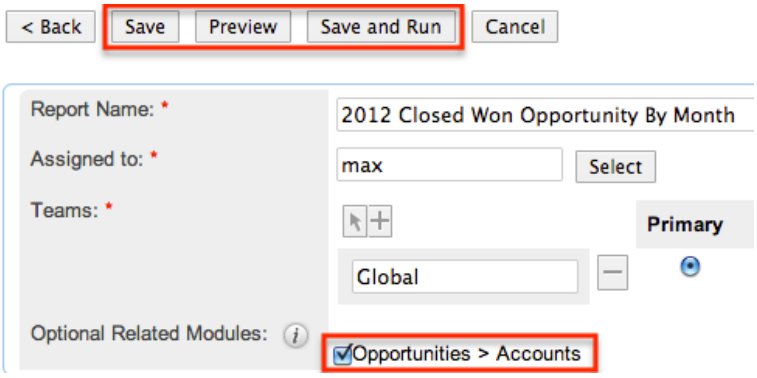



5. On the Choose Display Summaries step, select how you would like the opportunity amounts summarized on your report then click "Next". We will select "SUM: Opportunity Amount", which will add all the closed won opportunity amounts in 2012 and display the total for each grouping.
    - Please note that the field(s) you selected in the Define Group By step is automatically included in the Choose Display Summaries step.

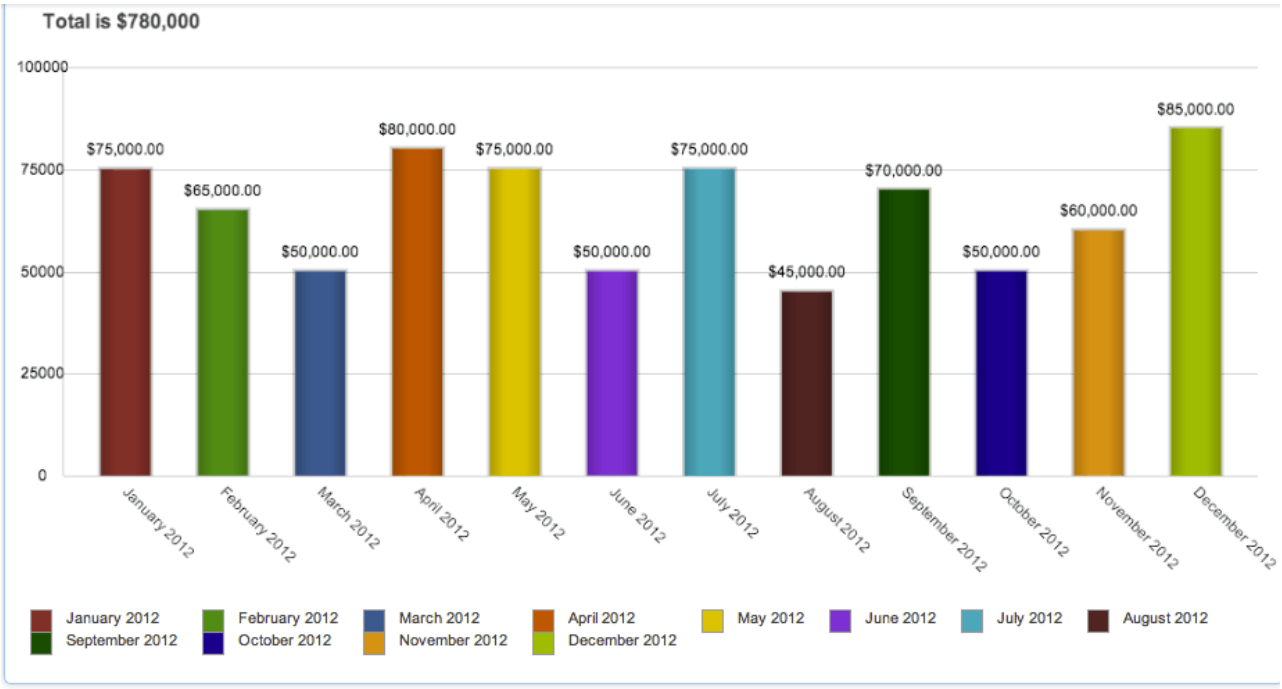



6. On the Choose Display Columns step, select the fields you would like included on the report from the Available Fields list on the bottom left then click "Next". The following fields will be included in this report: Opportunity Name, Opportunity Amount, Expected Close Date, Sales Stage, Account Name.
    - Refer to Steps 5-10 of creating Rows and Columns Report for instructions on how to add fields as display columns.
    - For more information on selecting display column fields, please refer to the Report Display Columns section of this documentation.

7. On the Chart Options step, select the chart type you want displayed in the report as well as how the data will be summarized on the chart then click "Next". We will select "Vertical Bar" as the chart type, summarized by the total opportunity amount per month.
    - For more information on setting up the chart options, please refer to the
8. On the Report Details step, enter a name for the report and assign it to the appropriate user and team.
    - Please note that if you want your report to include all closed won opportunities whether or not they have a related account, you will need to mark the Optional Related Modules box. For more information on marking related modules as optional, please refer to the Optional Related Modules section of this documentation.




9. Once the report details are entered, click "Save and Run" to save and generate the report immediately.
    - Clicking the Preview button allows you to preview the report prior to saving.
    - Clicking the Save button will save the report, but not run it immediately.




Collapse All

Month: Expected Close Date = January 2012, SUM: Opportunity Amount = $75,000.00

| Opportunity Name | Opportunity Amount | Expected Close Date | Sales Stage | Name |
|---|---|---|---|---|
| Southern Realty - 1000 units | $45,000.00 | 01/12/2012 | Closed Won | Southern Realty |

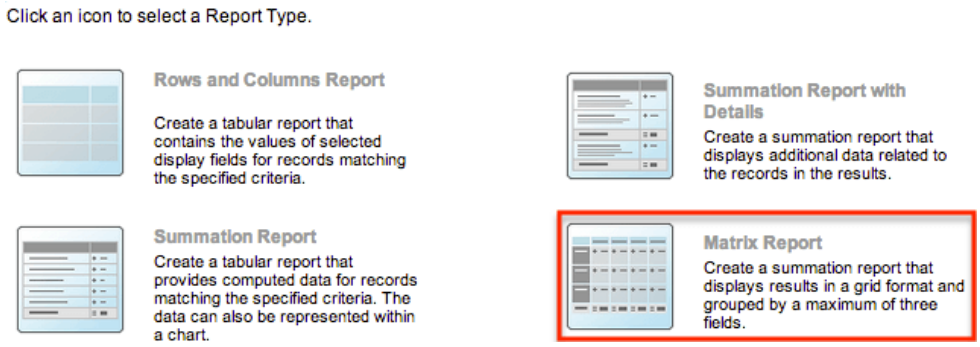
## Matrix Report

The Matrix Report provides an overview of the data and displays the total for display summaries in a grid format. The numeric field values for all display summaries will appear on the table along with the grand total amounts for each row and column. You can choose a maximum of three group-by columns to group the data in the report.

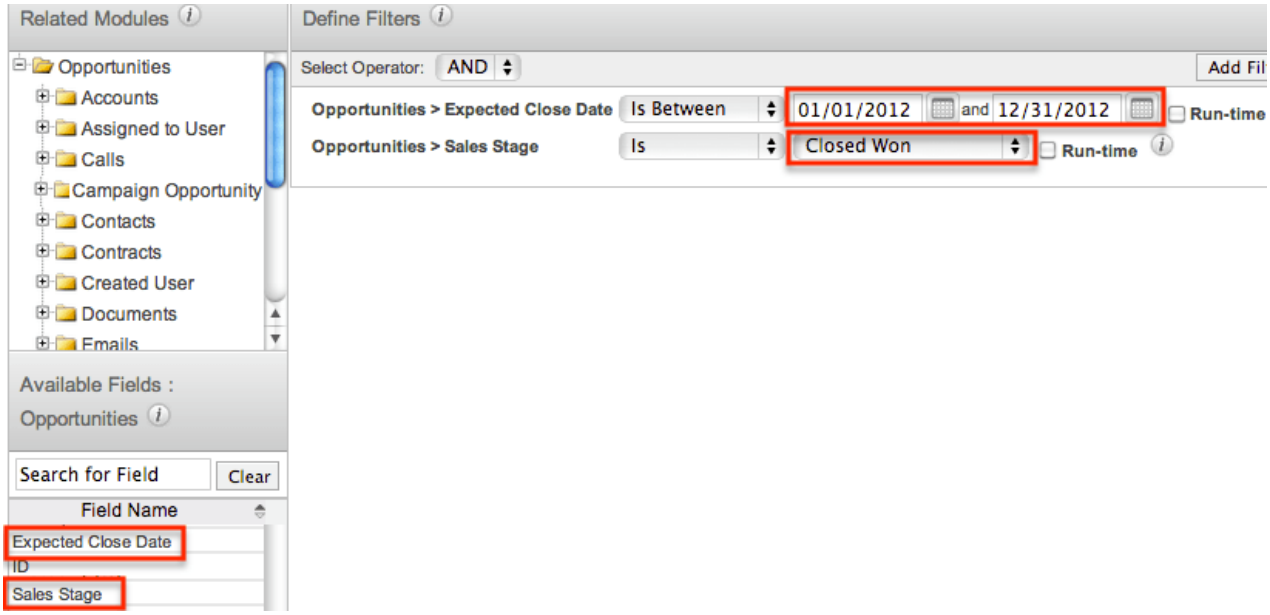
You can also choose specific layout options (e.g. 1x2 and 2x1) on the Report Details step of the Report Wizard if you selected three group-by columns on the Define Group By step. The 1x2 layout option displays the data for the first group-by field in a row and displays the data for the other two group-by fields in columns. The 2x1 layout option displays the data for the first two group-by fields in rows and displays the data for the third group-by field in a column. If you only have two group-by columns, you can manually change the report layout by dragging and dropping the group-by fields to a different order on the Define Group By step. Please note that the Matrix Report does not provide detailed information like Summation Report with Details and will not include display columns in the report.

The following steps cover creating a Matrix Report for the number of "closed won" opportunities in 2012 by month for each user as an example:

1. Navigate to the Reports module and select "Create Report".
2. Choose "Matrix Report" as the report type and "Opportunities" as the target module in the following step.

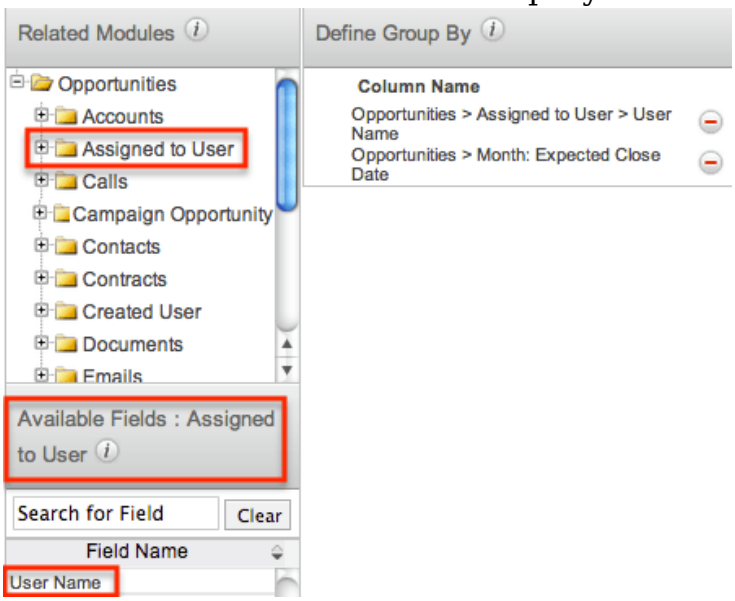



3. To filter on a field related to the target module (Opportunities), select it from the Available Fields list on the bottom left, and it will be added to the list of filters. We will select "Expected Close Date" and "Sales Stage" to filter the report based on closed won opportunities for 2012. Click "Next".
    - For more information on report filters, please refer to the Report Filters section of this documentation.

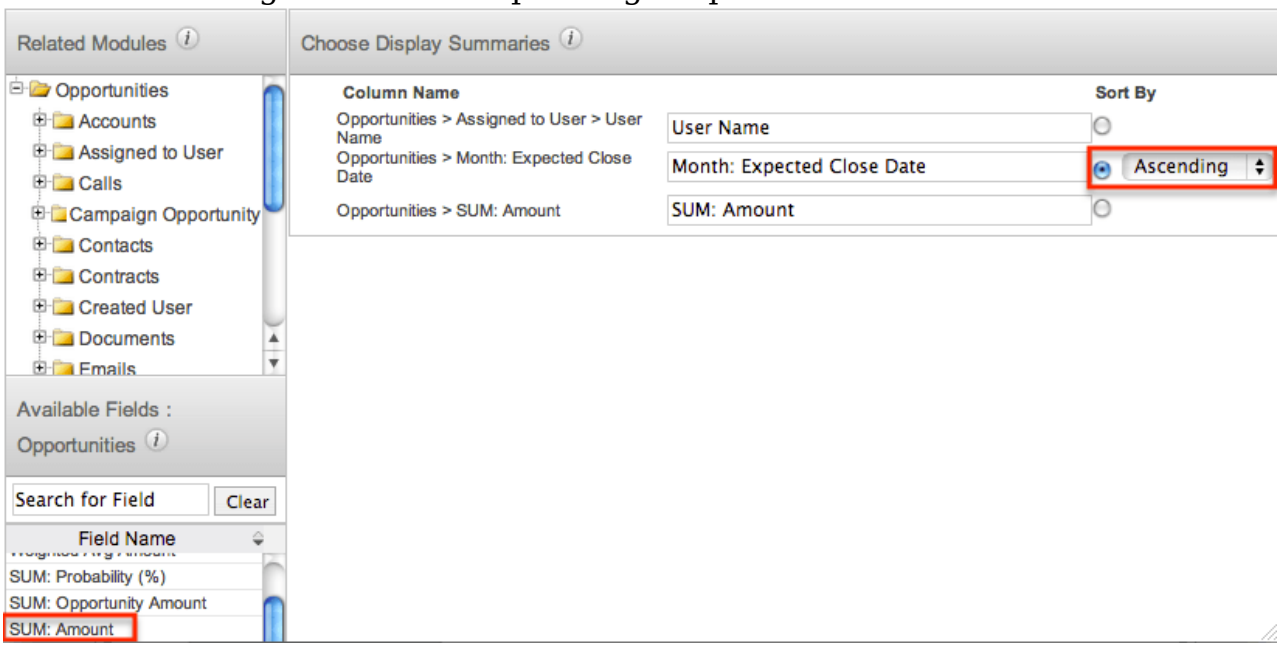



4. On the Define Group By step, select the field(s) you would like the records in the report result grouped by then click "Next". We will add "User Name" and "Month: Expected Close Date", which will group the opportunity records based on the assigned user and month of expected closed date.
    - Please note that you will have to click the related Assigned to User module to select the User Name field as user names are not direct fields of the Opportunities module. Next, click "Opportunities" in the Related Modules list to select "Month: Expected Close Date".
    - Note: The order of the Group By fields determine which fields constitute the X and Y axis of the displayed report grid. For this example, the assigned users will be listed in rows on the Y axis with the month of expected close date displayed across columns on the X axis of the report

grid. You can change the order of fields by dragging and dropping the field within the Define Group By section.

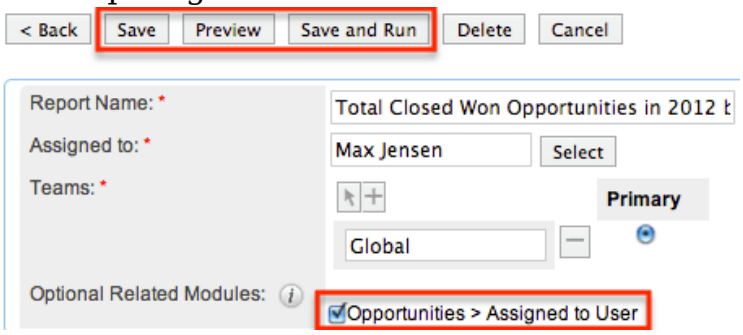



5. On the Choose Display Summaries step, select how you would like the opportunity amounts summarized on your report then click "Next". We will select "SUM: Amount", which will add all closed won opportunities in 2012 and display the total amount of won opportunities by month by user as well as the grand total per user and for all users.
    - Please note that the field(s) you selected in the Define Group By step is automatically included in the Choose Display Summaries step.
    - Note: You can designate the generated report to be sorted by a specific field column in either ascending or descending order. Simply mark the radio button next to the field label then select "Ascending" or "Descending" in the corresponding dropdown list.

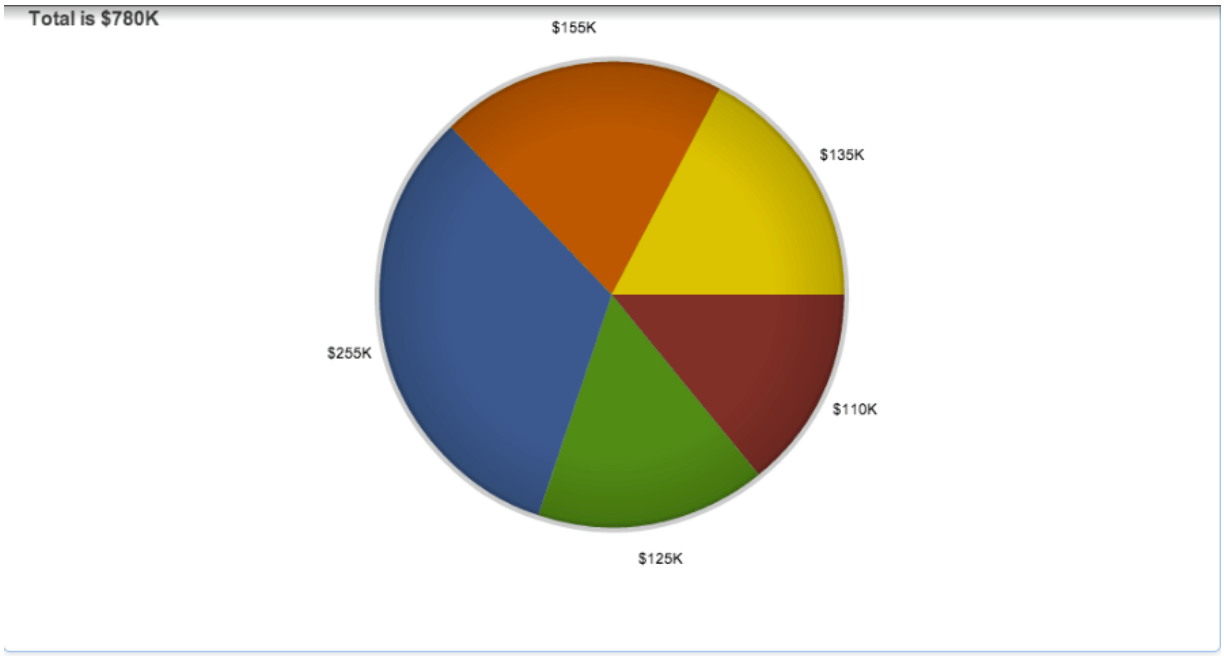



6. On the Chart Options step, select the chart type you want displayed in the report as well as how the data will be summarized on the chart then click

"Next". We will select "Pie" as the chart type summarized by the total opportunity amount.
    - For more information on setting up the chart options, please refer to the
7. On the Report Details step, enter a name for the report and assign it to the appropriate user and team.
    - Please note that if you want your report to include all closed won opportunities whether or not it is assigned to a user, you will need to mark the Optional Related Modules box. For more information on marking related modules as optional, please refer to the Optional Related Modules section of this documentation.
    - Note: The Layout Options dropdown list (1x2 and 2x1) will appear if you selected three group-by columns on the Define Group By step. Select the appropriate layout depending on how you want the data displayed on the report grid.




8. Once the report details are entered, click "Save and Run" to save and generate the report immediately.
    - Clicking the Preview button allows you to preview the report prior to saving.
    - Clicking the Save button will save the report, but not run it immediately.




SUM: Amount

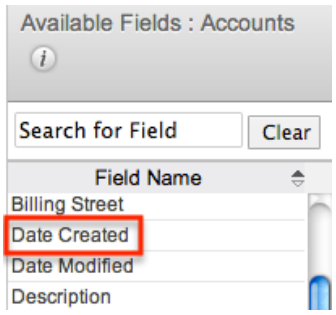
| User Name | Month: Expected Close Date | | | | | | | | | | | | Grand Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | January 2012 | February 2012 | July 2012 | October 2012 | March 2012 | May 2012 | June 2012 | September 2012 | November 2012 | April 2012 | August 2012 | December 2012 | |
| chris | $45,000.00 | $65,000.00 | | | | | | | | | | | $110,000.00 |
| max | | | $75,000.00 | $50,000.00 | | | | | | | | | $125,000.00 |
| sally | $30,000.00 | | | | $50,000.00 | $25,000.00 | $50,000.00 | $70,000.00 | $30,000.00 | | | | $255,000.00 |
| sarah | | | | | | | | | $30,000.00 | $80,000.00 | $45,000.00 | | $155,000.00 |
| will | | | | | | $50,000.00 | | | | | | $85,000.00 | $135,000.00 |
| Grand Total | $75,000.00 | $65,000.00 | $75,000.00 | $50,000.00 | $50,000.00 | $75,000.00 | $50,000.00 | $70,000.00 | $60,000.00 | $80,000.00 | $45,000.00 | $85,000.00 | $780,000.00 |

## Report Filters

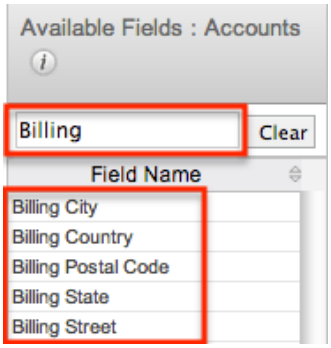
The Define Filters step of the report wizard determines which records the report includes or filters out. Filter groups and operators allow for additional levels of complexity as you combine filters to get the precise result set you desire.

### Target Module Filters

By default, the fields for the Target Module you are creating the report on will be displayed in the Available Fields list. To filter on the field related to the target module, select it from the Available Fields list on the bottom left, and it will be added to the list of filters. Please note that only fields marked as "Reportable" in Studio will display in the Available Fields list. For more information on marking fields as reportable, please refer to the Studio documentation in the Administration guide.

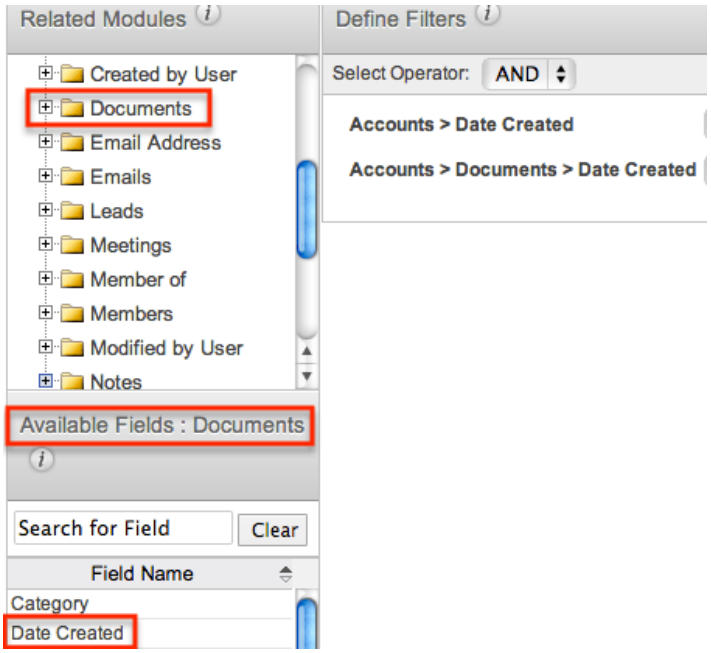



You can also use the search feature above the Available Fields list to easily locate a desired field. Simply enter in the appropriate keyword (e.g. billing, date, etc.) in the search field and the relevant results will display in the Available Fields list. Please note that Sugar automatically appends the wildcard character (%) to the beginning and end of your search phrase. This allows the system to return all fields that include the keyword entered in the search.

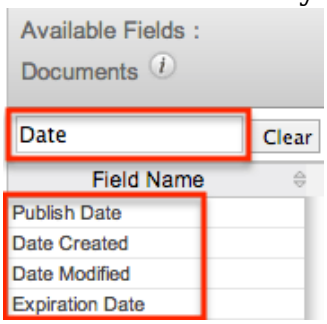



Related Module Filters

The Related Modules list shows all modules that have a relationship with the target module. To filter on a field in a related module, choose the name of the module (e.g. Documents) in the Related Modules list, and the Available Fields list below will display fields belonging to the related module. You can select the desired field(s) from the related module to add as a filter for your report. Please note that only fields marked as "Reportable" in Studio will display in the Available Fields list. For more information on marking fields as reportable, please refer to the Studio documentation in the Administration guide.

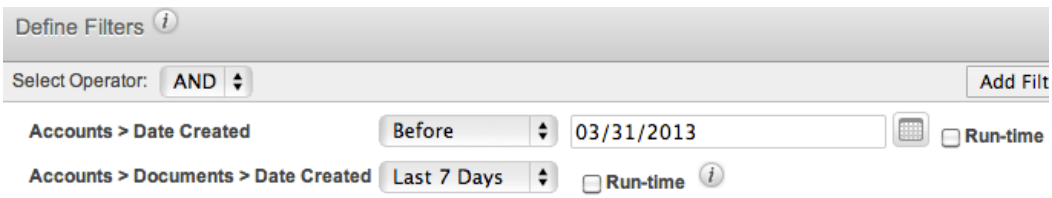



You can also use the search feature above the Available Fields list to easily locate a desired field. Simply enter in the appropriate keyword (e.g. billing, date, etc.) in the search field and the relevant results will display in the Available Fields list. Please note that Sugar automatically appends the wildcard character (%) to the beginning and end of your search phrase. This allows the system to return all fields that include the keyword entered in the search.

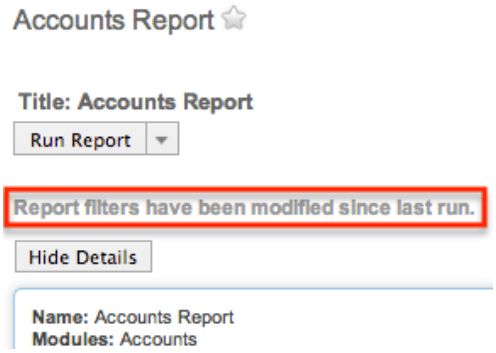



## Filter Values

Once the filter has been created, you can specify what field values constitute a match for the report in the Define Filters section. Select the appropriate value from the corresponding dropdown list and enter the relevant value in the open text box (if applicable).

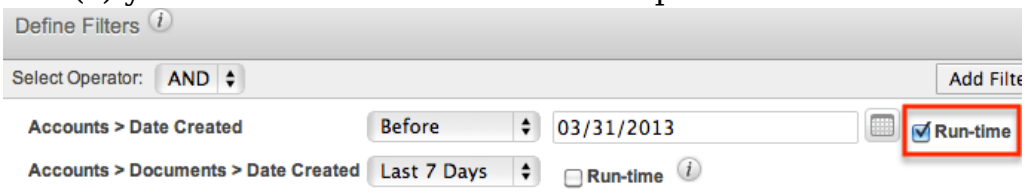


Please note that if the assigned user or a member of your team changes or adds a new filter, the system alerts you that the report filters have been modified since last run when you save and run the report.

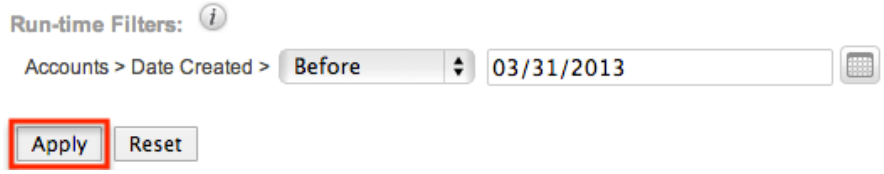



Run-Time Filters

The run-time option in the Define Filters step allows you to make the filter(s) available on the saved report, which enables you to quickly change your filter values without having to edit the report. Simply mark the Run-time box for any filter(s) you wish to view on the saved report.



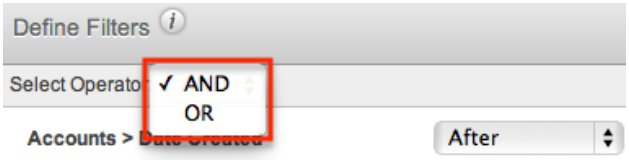

Once the report is created and saved, the run-time filter (e.g. "Accounts > Date Created") will appear on the generated report view. You can change the filter values directly from the report view by selecting the new filter values from the dropdown list and clicking "Apply" or "Run Report" at the top of the report's detail view. Clicking the Reset button will reset the run-time filter back to the original filter value you set.




Please note that the Report Wizard retains the original filter value(s) you set when building the report regardless of the changes you or other user's make on the run-time filters on the report's detail view. If the report is shared by a team, then each user can run the report with different run-time filter values to meet their individual needs. The run-time filter values set by each user will be preserved for future viewing until they change or reset the value.

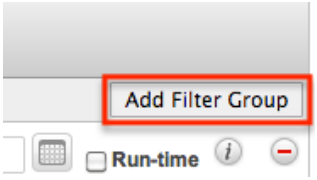
Operators

When building the report, you have the option to choose between two operators, "AND" and "OR", using dropdowns within the Define Filters section. By default, operators are set to "AND" which will cause the filters to work cumulatively. All filters, or groups of filters under an AND operator will need to be true for a record in order for that record to appear in the report result. Changing an operator to "OR" will mean that if any single filter under that "OR" is true for a record, the record will be included on the report. The OR operator accepts records matching any of the filters while the AND operator accepts records matching all filters.

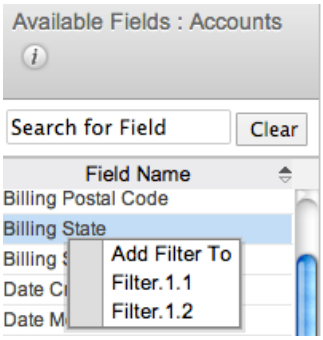



Filter Groups

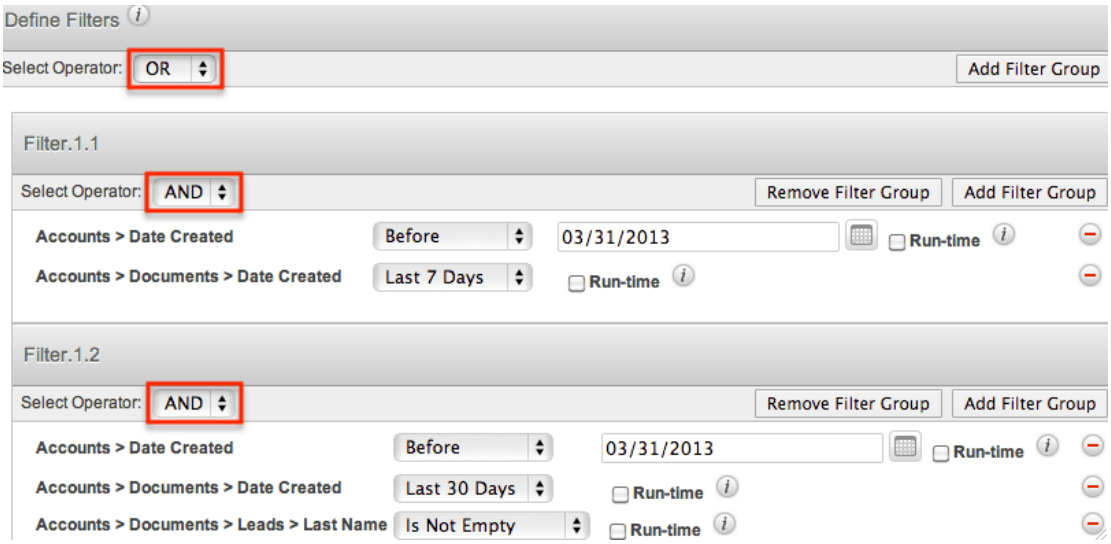
By default, all filters will be added to a single group. To split filters into multiple groups, use the Add Filter Group button.




When you have more than one filter group and click a new filter field, Sugar will prompt for which filter group the new field should belong.




Filter groups and operators can be combined to achieve complex filtering situations. For example, if we need a report for documents belonging to accounts created prior to the first quarter where the document is either new this week or new this month if connected to a lead, we wou ld use the following filter groups with an OR operator joining the two together:




Filters on Date and Datetime Fields

When creating reports in Sugar, specifying a range of time is a useful way to isolate your desired results. Sugar provides a set of pre-defined options to help you easily target the most common date ranges:

| Date Range Filter | Definition |
|---|---|
| On | A specific day |
| Before | Any value before the specified date |
| After | Any value after the specified date |
| Is Between | Any values after a specified start date but before a specified end date |
| Not On | Any values except the specified date |
| Is Empty | No date set for the field |
| Is Not Empty | Any date set for the field |
| Yesterday | A value set to the prior day |
| Today | A value set to the current day |
| Tomorrow | A value set to the following day |
| Last # Days | Any values within the last X days including the current day |
| Next # Days | Any values within the next X days including the current day |
| Last 7 Days | Any values within the last 7 days including the current day (e.g. Running on Monday includes the previous |

| | |
|---|---|
| | Tuesday morning through the end of the current Monday) |
| Next 7 Days | Any values within the next 7 days including current day (e.g. Running on Monday includes the the current Monday morning through the end the following Sunday) |
| Last Month | Any values that fall within the prior calendar month |
| This Month | Any values that fall within the current calendar month |
| Next Month | Any values that fall within the next calendar month |
| Last 30 Days | Any values within the last 30 calendar days including the current day |
| Next 30 Days | Any values within the next 30 calendar days including the current day |
| Last Quarter | Any values within the prior quarter defined by the calendar year (e.g. January - March, April - June, etc.) |
| This Quarter | Any values within the current quarter defined by the calendar year (e.g. January - March, April - June, etc.) |
| Next Quarter | Any values within the upcoming quarter defined by the calendar year (e.g. January - March, April - June, etc.) |
| Last Year | Any values within the prior calendar year |
| This Year | Any values within the current calendar year |
| Next Year | Any values within the upcoming calendar year |

Additionally, if your administrator has configured the Forecasts module via Admin > Forecasts, additional options based on your organization's fiscal year will be available. If your fiscal year follows a traditional calendar year, these options will function in the same way as the corresponding options above:

| Date Range Filter | Definition |
|---|---|
| Previous Fiscal Year | Any values within the prior fiscal year |
| Previous Fiscal Quarter | Any values within the prior quarter |

| | |
|---|---|
| | defined by the fiscal year |
| Current Fiscal Year | Any values within the current fiscal year |
| Current Fiscal Quarter | Any values within the current quarter defined by the fiscal year |
| Next Fiscal Year | Any values within the upcoming fiscal year |
| Next Fiscal Quarter | Any values within the upcoming quarter defined by the fiscal year |

For more information about configuring the Forecasting module, please refer to the Forecast Configuration documentation in the Administration guide.

Note: When generating reports with datetime filters, Sugar will always adjust the results to ensure they are accurate according to the time zone settings of the user accessing the report. For instance, a user on Eastern Standard Time (-5 GMT) may see a different set of results for a report than a user on Pacific Standard Time (-8 GMT) because the date ranges are adjusted for the user's time zone.

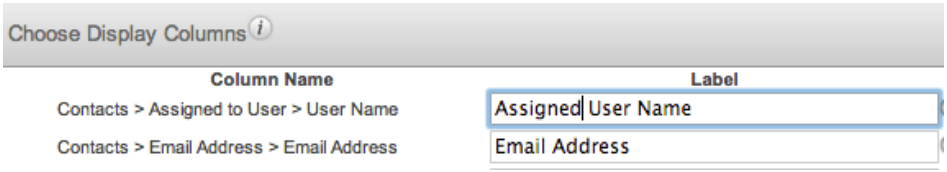
## Report Display Columns

The display columns step allows users to select which field(s) they would like included when generating the report. The system will pull data specific to these fields based on the report criteria for the associated module record. When you select a field from the Available Fields list, they will be added to the right of the list with the displayed path of the field (e.g. Contacts > Assigned to User > User Name). The displayed field paths show users where the field is originating from to retrieve the value for the report. For example, although "Email Address" appears as a field in several modules (e.g. Accounts, Contacts, Leads, etc.), email addresses are actually stored in their own table and are related to the modules where they appear as opposed to being direct fields of those modules. So, the corresponding displayed path will show the primary module record, then the related module followed by the field name (e.g. Contacts > Email Address > Email Address) since the email address field is a field of the related Email Address module.

To remove any unecessary fields from the display column list, simply click the "-" sign to the far right of the displayed field path row.

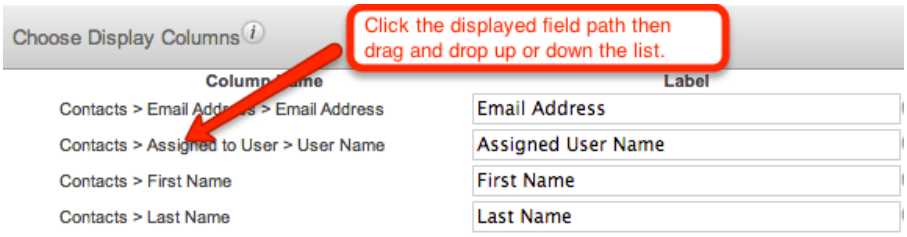
### Changing Display Column Labels

By default, the selected display column fields will display stock labels which can be changed if you desire. To change the label, simply enter in the new label name in the open text field then click outside of the text box to preserve the change.



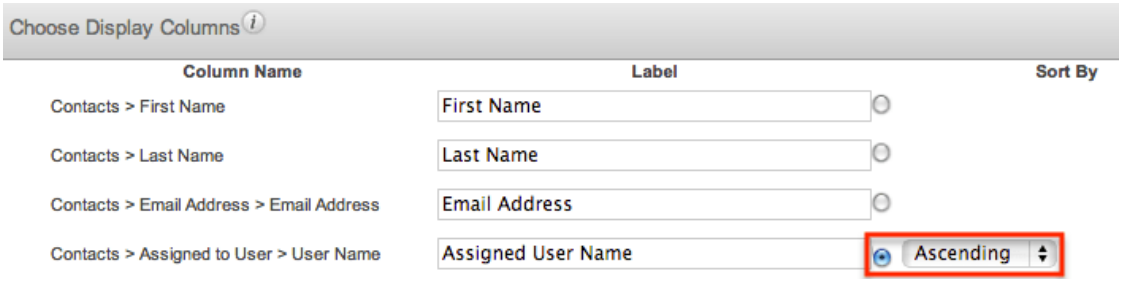

### Changing Display Column Order

You can change the left-to-right order of the display columns by dragging and dropping the displayed field paths in the Choose Display Columns section.




### Defining Column Sort

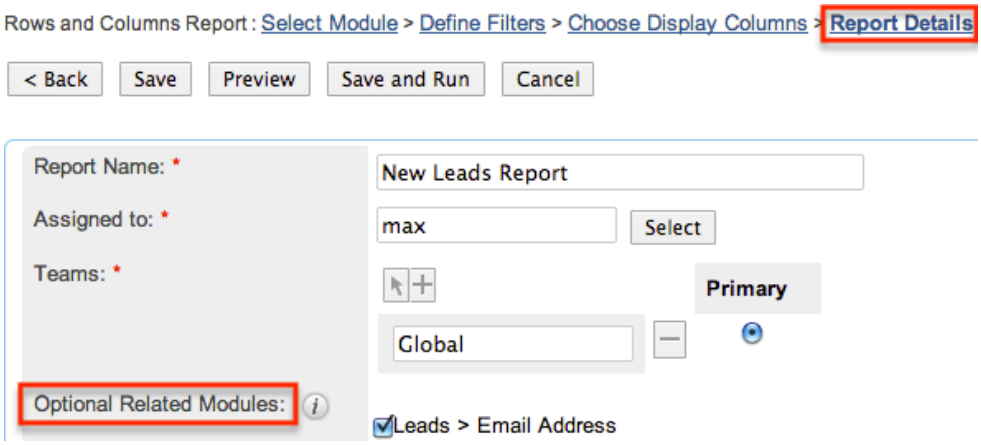
You can also designate the generated report to be sorted by a specific field column in either ascending or descending order. Simply mark the radio button next to the field label then select "Ascending" or "Descending" in the corresponding dropdown list. Please note that only one display column can be designated to sort by default in the report.




## Optional Related Modules

The Optional Related Modules option will appear on the Report Details step if you add fields from related modules to the display column. Please note that if you want your report to include records whether or not they have data in the fields, you will need to mark the displayed module relationship(s) in the Optional Related Modules section. For example, if you add the email address field as a display column for the New Leads report, the Optional Related Modules section will display "Leads > Email Address". Check the box for the Email Address relationship in order to

include all applicable results even if the lead record does not contain an email address. By default, Sugar treats all related modules in a report as mandatory meaning that an email address will be required for a lead record to be included.

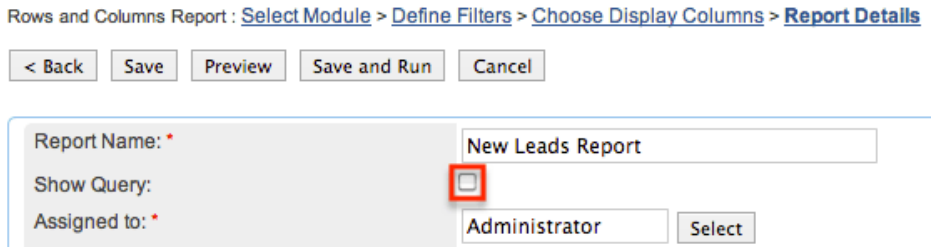



Leaving this box unchecked will exclude all lead records from your report that do not have an email address associated with them.

This holds true for all related modules. You will need to check the box for any relationship you do not wish to be treated as mandatory when Sugar is generating your report.

### Show Query

The Show Query option is only visible to system administrators and displays as a checkbox on the Report Details step. If the Show Query box is checked and the Preview button is clicked, the generated report will display all the SQL queries at the bottom of the page for administrators to use and analyze how the specific data was retrieved in the system.




## Viewing Reports

There are various options available for viewing reports in Sugar including via the Reports list view, Reports detail view, Reports Recently Viewed menu, and dashlets. Please note that you will only be able to see reports as allowed by your team membership, user access type, and assigned roles. For more information on

teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

## Viewing Via List View

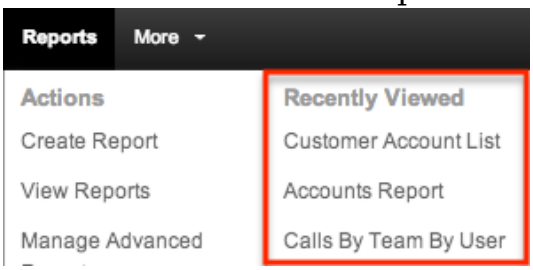
The Reports list view displays all reports meeting the current search criteria. To access the list view, simply click the Reports module tab. While list view shows basic report information (e.g. report name, report type, target module for report, etc.), you can click the report's name to view the data in the report's detail view. For more information on viewing reports via list view, please refer to the Reports List View sectionof this documentation.

## Viewing Via Detail View

The Reports detail view displays key data specific to the report including the display column fields, display summaries, charts, etc. The detail view can be reached by clicking a report record's link from anywhere in the application including from the Reports list view. For more information on viewing reports via detail view, please refer to the Reports Detail View section of this documentation.

## Viewing Via Recently Viewed

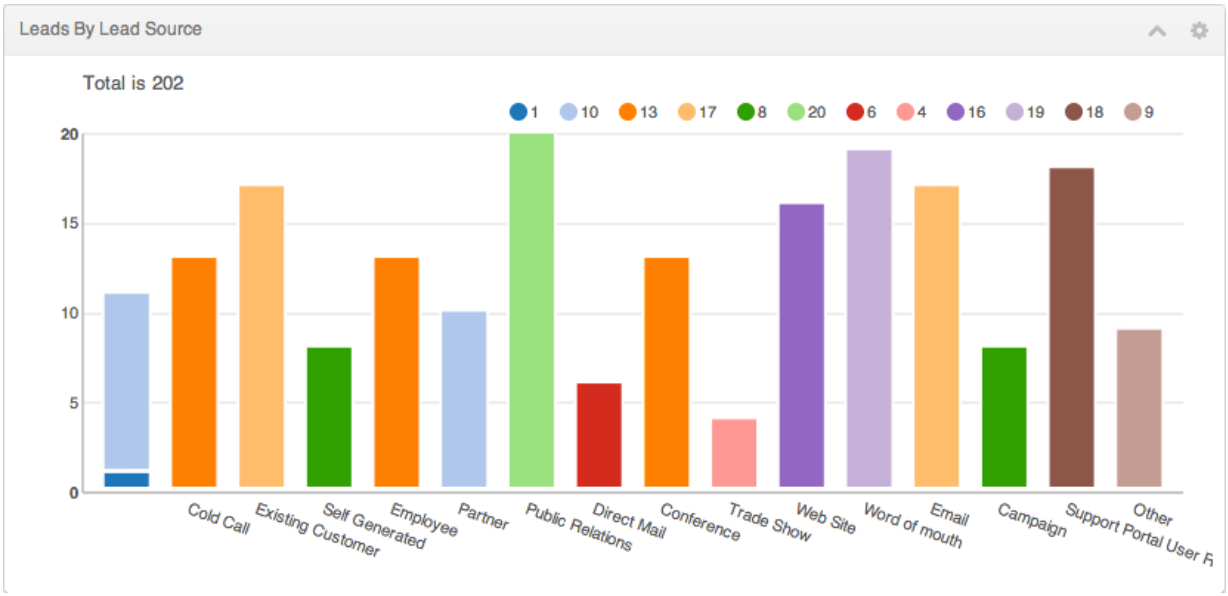
As you work, Sugar will keep track of which reports you have recently viewed. Hover on the Reports module tab to see a list of your most recently viewed reports and click each name to open the report in detail view.




## Viewing Via Dashlets

You can view report details via Report Chart dashlets such as "Saved Reports Chart". The Saved Reports Chart dashlet allow you to view pre-defined report charts as well as any saved custom report charts. Please note that only report types(e.g. Summation with Details-type, Summation-type, and Matrix-type reports) with charts can be added as dashlets in Sugar. When adding the Saved Reports Chart dashlet, you can choose from a list of pre-defined and custom reports to view on your Home page or Intelligence pane. For more information on adding dashlets,

please refer to the Intelligence Pane documentation.




## Searching Reports

The Reports list view includes a Basic and Advanced Search to help you locate reports easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Reports list view below. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all reports that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %accounts). This will pull up any report that has the word "accounts" in the name, regardless of how it starts or ends.

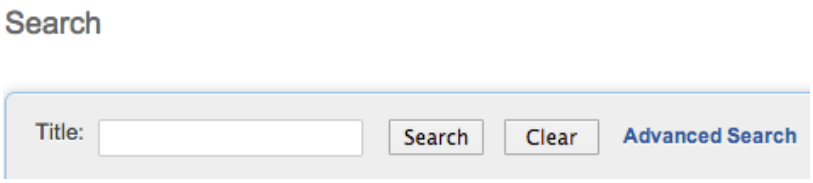
For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

### Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.

The buttons available in Basic Search panel have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.



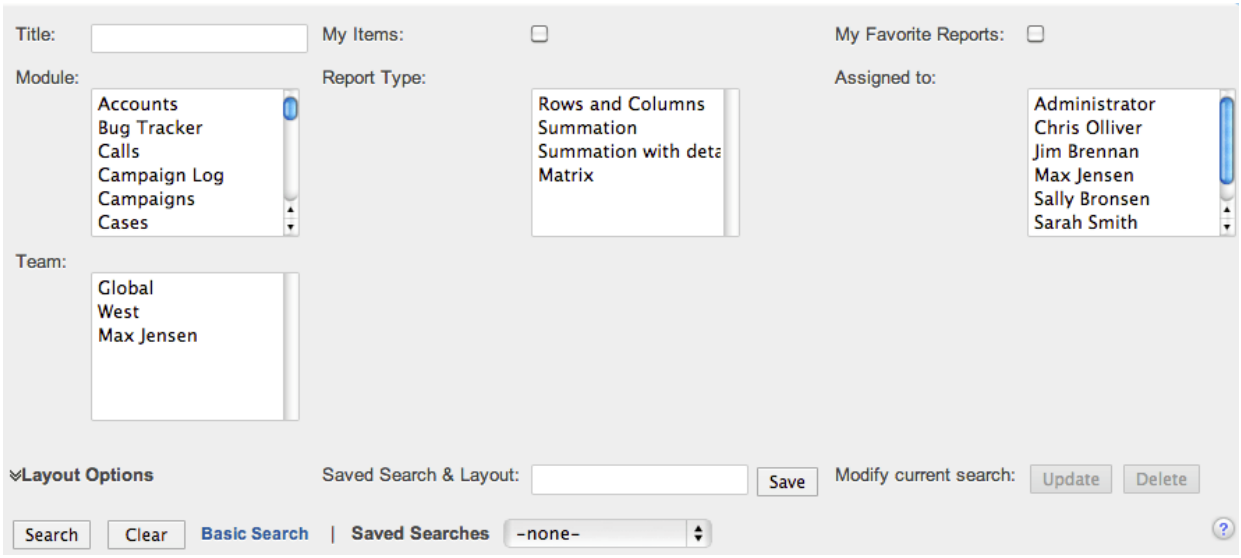

Enter in the appropriate keyword in the basic search Title field then click the Search button. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all reports to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see reports as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management in the Administration guide.

## Advanced Search

Advanced Search offers a more in-depth search experience than Basic Search including additional fields, layout options, and saved search capability. From the Advanced search panel, you can click "Basic Search" for simplified searching.

The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Items : Select this box to return only reports assigned to you.
- My Favorite Reports : Select this box to return only reports you have marked as favorites.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the Layout Options section of the Search documentation.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section of the Search documentation.




When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select "My Favorite Reports" and enter in a report title to search, Sugar will only return reports with a matching name that you have marked as favorites. When searching by a multiselect or dropdown field (e.g. "Assigned to"), however, Sugar will return reports matching any of these selections. Once the search completes, the relevant results will populate in the list view below the search panel. To see all reports to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters.Please note that you will only be able to see reports as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

## Reports List View

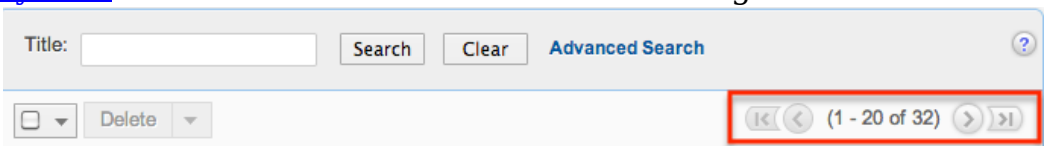
The Reports list view displays all reports meeting the current search criteria and to which your user has access. You can view the basic details of each report within the field columns. Please note that you will only be able to see reports as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

You have the option to change what fields are displayed in list view by configuring your layout options in the Reports Advanced Search. For more information on configuring your list view, please refer to the Layout Options section of the Search documentation.

### Pagination

List view displays the current search results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. To the right just below the search panel you can see which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of your current results.

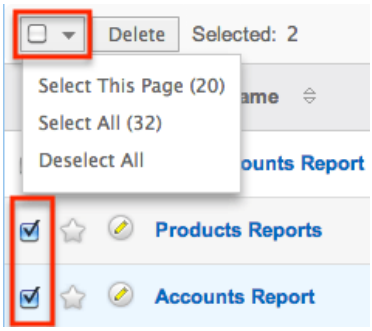
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.




## Checkbox Selection

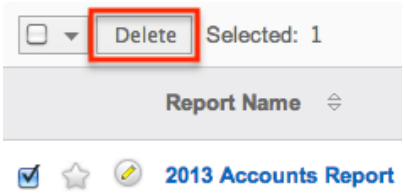
You can perform several actions on report records directly from the list view by first selecting the desired reports. To select individual report records on the Reports list view, mark the checkbox on the left of each row. To select or deselect multiple report records on the list view, use the options in the checkbox dropdown menu:

- Select This Page : Selects all reports shown on the current page of report results.
- Select All : Selects all reports in the current search results across all pages of report results.
- Deselect All : Deselects all reports that are currently selected.



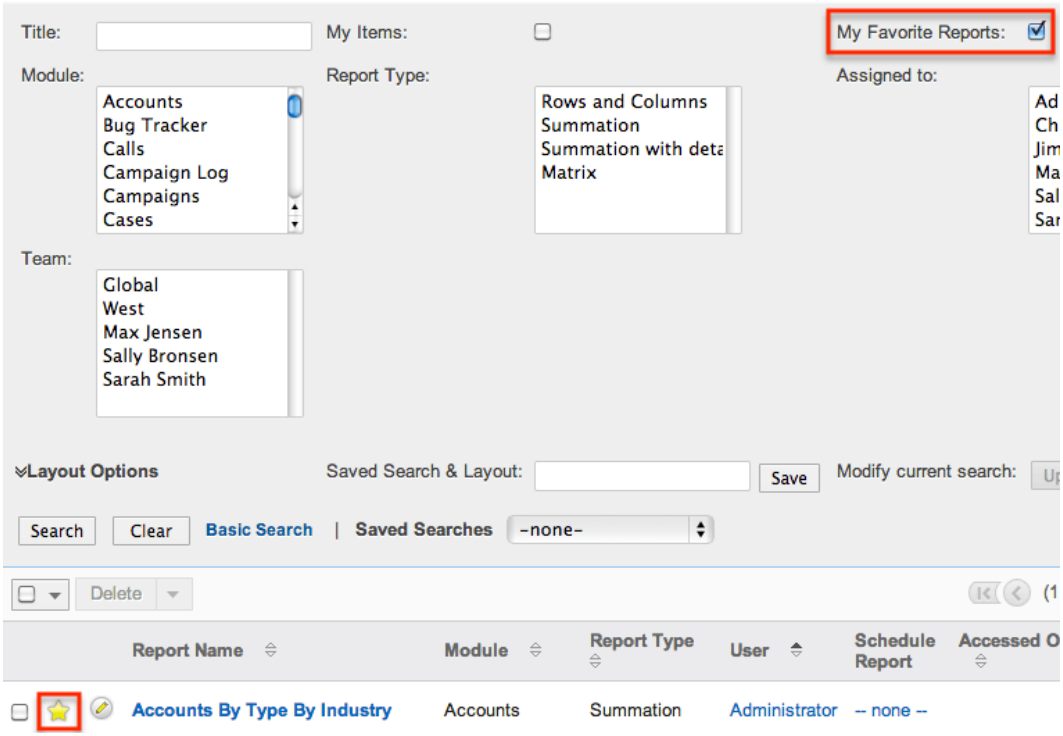

## Delete Button

The Delete button to the right of the checkbox dropdown allows you to Delete one or more reports at a time. Please note that your ability to delete reports in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete button.




## Favorite Designation

Users have the option to mark report records as favorites via the list view as well as the detail view. This allows users to designate reports that are important or will be viewed often so that they can easily be accessed via search or from the Reports module tab. In the Reports list view, the star on the left of each report's row is yellow once marked to indicate a favorite report. For more information on how to mark records as favorites, please refer to the Favoriting Reports section of this documentation.




## Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time. You can also set a default order-by column using the layout options in Advanced Search. For more information on setting a default column sort, please refer to the Layout Options section of the Search documentation.



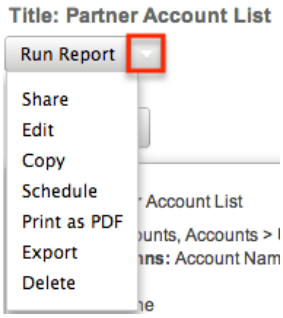

## Reports Detail View

The Reports detail view displays thorough report information including display column fields (if applicable), charts (if applicable), etc. The detail view can be reached by clicking a report record's link from anywhere in the application including from the Reports list view.

Please note that you will only be able to view a report according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

### Actions Menu

The Actions menu on the top left of each report's detail view allows you to perform various actions on the current report. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the System documentation in the Administration guide.




The options in the Actions menu allow you to perform the following operations:

| | |
|---|---|
| Run Report | Run this report to generate the result |
| Share | Share a link to this report via email |
| Edit | Edit this report |
| Duplicate | Duplicate this report |
| Schedule | Schedule this report to be delivered via email |
| Print as PDF | Print this report as a PDF file |
| Export | Export this report result to a CSV file<br><br>Note: Only available for Rows and Columns-type report |
| Delete | Delete this report |

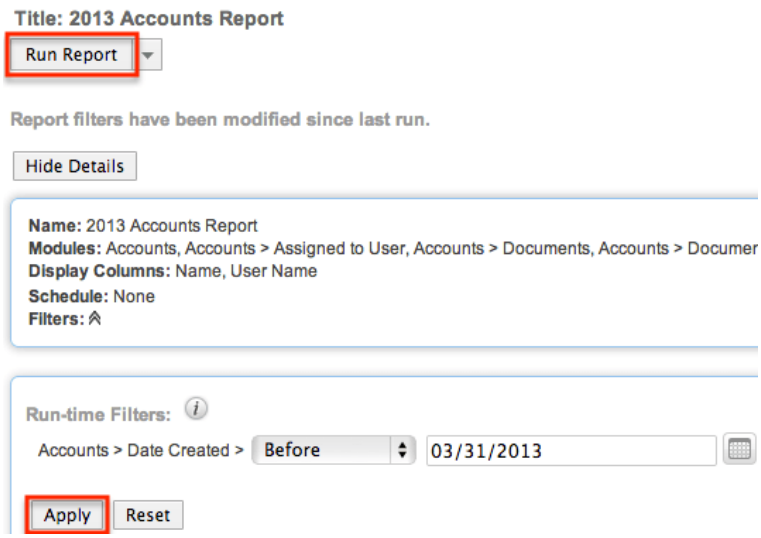
## Favorite Designation

Users have the option to mark reports as a favorite via the detail view as well as the list view. This allows users to designate reports that are important or will be viewed often so that they can easily be accessed via Advanced search or from the Reports module tab. In the Reports detail view, the star on the right of the report's name is yellow once marked to indicate a favorite report. For more information on how to mark reports as favorites, please refer to the Favoriting Reports section of this documentation.



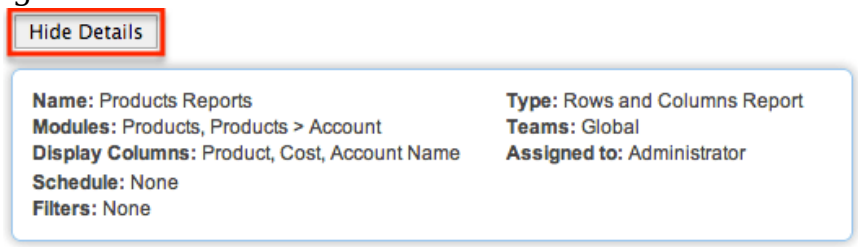

## Run-time Filters

Run-time filters allow you to quickly change the filter values on the report without having to edit the report. Please note that run-time filters only appear if filters are set in the Define Filters step when building the report. The report will be filtered based on the original filter value, but you can change the value via the Run-time filter and click "Apply" or "Run Report" to re-generate the report result. For more information on run-time filters, please refer to the Run-Time Filters section of this documentation.




## Report Details

By default the report details box will appear displaying the reports name, display columns, report type, team(s) assigned to report, etc. To hide the report details, simply click the Hide Details button on the upper left of the report's detail view. Once the report details are hidden, the Show Details button will appear in place of the Hide Details button. Click the Show Details button to display the report details again.




## Report Chart

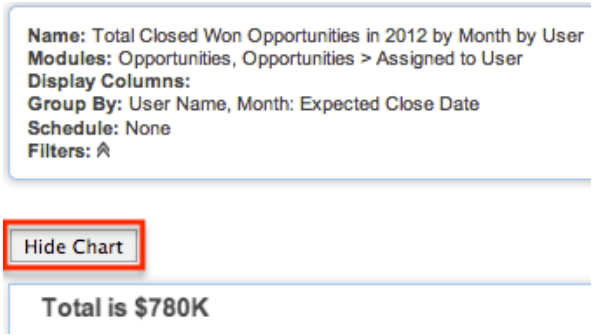
Users have the option to display the data as a chart in report results if desired. The chart option is only available for Summation with Details-type, Summation-type, and Matrix-type reports. You can choose the chart type (e.g. Pie, Horizontal Bar, Vertical Bar, etc.) you want the report data displayed via the Chart Options step of the Report Wizard. Please note that at least one of the calculated fields (e.g. Count, AVG: Amount, SUM: Amount, etc.) in the Choose Display Summaries step must be selected in order to be able to select a chart type in the Chart Options step.

Note: When you make a chart in the reports module, there is a limit to the number of groups allowed. The limit is 50 groups for all charts except funnel, for which the limit is 16. The limit only applies to charts. If the number of elements is more than

50 (or 16 for funnel) then an error message is displayed at run time.

The report charts can also be added and displayed as a Sugar Dashlet on your Home page. For more information on viewing charts via dashlets on your Home Page, please refer to the Viewing Via Dashlets section of this documentation. Please note that at least one Group By and one Display Summary column is required to generate a chart.

The chart is displayed on the report by default, but you can hide the chart by simply clicking the Hide Chart button on the upper left above the chart. Once the report chart is hidden, the Show Chart button will appear in place of the Hide Chart button. Click the Show Chart button to display the chart again.

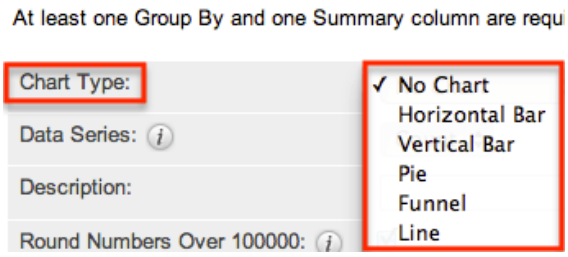



Report Chart Options

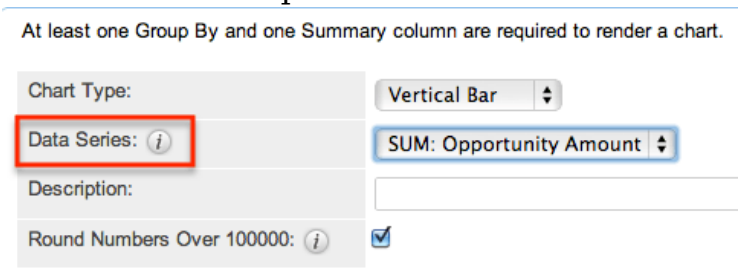
The Chart Options step of the Report Wizard allows users to choose the chart type they want displayed on the generated report as well as how the data will be summarized within the chart. Please note that at least one of the calculated fields (e.g. Count, AVG: Amount, SUM: Amount, etc.) in the Choose Display Summaries step must be selected in order to be able to select a chart type in the Chart Options step.

The following options are available in the Chart Options step of the Report Wizard:

- Chart Type : Select the chart type you want the data to be displayed on your report.
  - No Chart : No chart will be generated for the report result.
  - Horizontal Bar : The report data will be displayed in horizontal bars.
  - Vertical Bar : The report data will be displayed in vertical bars.
  - Pie : The report data will be displayed as a pie chart.
  - Funnel : The report data will be displayed as a funnel chart.
  - Line : The report data will be displayed as a line chart.




- Data Series : Select how you want the chart data to be summarized. The field(s) you select in the Choose Display Summaries step will be available to choose in this dropdown list.



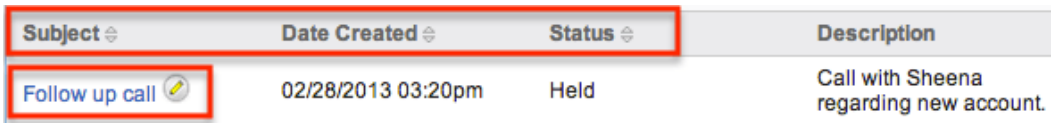

- Description : Enter in a brief description to label the chart if you wish.
- Round Numbers Over 100000 : Check this box if you want numbers over 100,000 to be rounded in the report charts. For example, 150,000 will be displayed as 150K.

## Report Results

The report's detail view will display the report results with relevant data and report chart (if applicable) for all records that meet the specified criteria. Please note that each report type will display the report results differently and users should consider how they would like to view the data prior to creating the report.

### Rows and Columns Report Result

The report results for this report type displays the data in a simple rows and columns format. The display column field values for all records that meet the specified criteria will appear on the report result. You may edit records via the report by clicking the pencil icon next to the records name and view the record's detail view by clicking the record name. You can also sort the report results by a display column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. Please note that the report may be sorted by only one column at a time. To view an example Rows and Columns report result, please refer to the creating Rows and Columns Report section of this documentation.

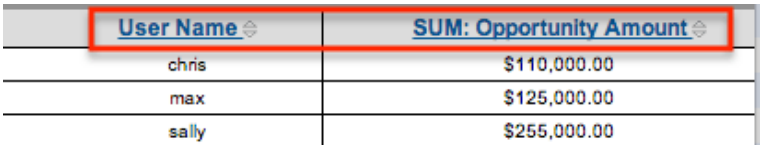


| Subject | Date Created | Status | Description |
|---|---|---|---|
| Follow up call | 02/28/2013 03:20pm | Held | Call with Sheena regarding new account. |

Summation Report Result

The Summation Report provides an overview of the selected field data(s) grouped by specific criteria(s). The report result displays the data in groups summarized using computed derivatives (e.g. SUM, AVG, MAX, MIN) from numeric-type field values (e.g. opportunity amount, amount, etc.) as well as weighted amounts. Each field you select in the Define Group By and Choose Display Summaries will be displayed as a column in the report result. The field(s) in the Define Group By list determines how the data will be grouped on the report results table and the chart. For example, if you group the opportunity report by "User Name" then "Month: Expected Close Date" on the Define Group By list, the opportunity records will be grouped by the user assigned to the opportunity and each user will be broken up by month of the expected close date on the report result. The grand total of the summarized field values will display at the bottom of the report results page.

You can sort the report results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. Please note that the report may be sorted by only one column at a time. To view an example Summation report result, please refer to the Creating Summation Report section of this documentation.



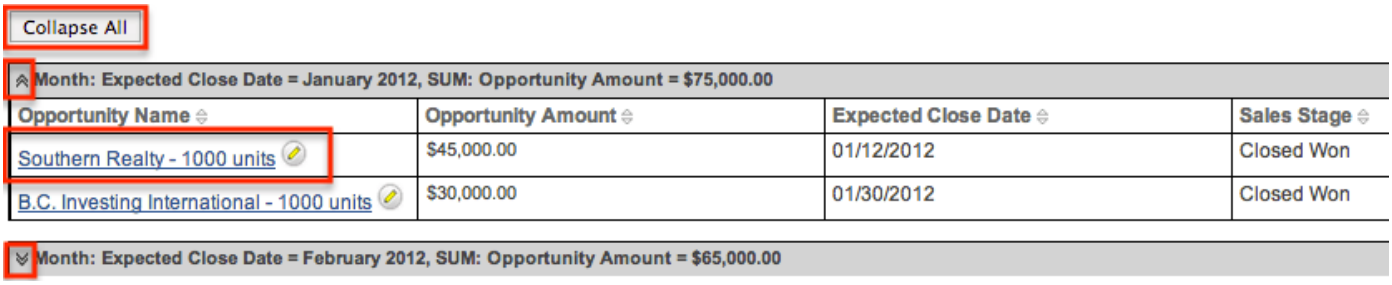
| User Name | SUM: Opportunity Amount |
|---|---|
| chris | $110,000.00 |
| max | $125,000.00 |
| sally | $255,000.00 |

Summation Report with Details Result

The Summation Report with Details groups the data and displays the total summary count for records in the report result. Unlike the Summation Report, this report type includes display columns for fields related to the target and related module. The report result will group the data in different categories based on the specified field values. If you choose to display the data as a chart, it will appear at the top of the report results page. The field values for all records that meet the specified criteria will be displayed in a rows and columns type table broken up into grouped panels.You can sort the report results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. Please note that the report may be sorted by only one column at a time. You may also edit records via the report by clicking the pencil icon next to the

records name and view the record's detail view by clicking the record name.

Each panel header will display the grouped by field value(s) along with the total summary count for the group. You can collapse the grouped panels individually by clicking the double up arrow to the far left of the header or click "Collapse All" to collapse all panels. Collapsed panels will display the header with the display summaries for each group and you can click the double down arrow to open the panels again. The grand total for the summarized field values will appear at the bottom of the report results page. To view an example Summation with Details report result, please refer to the Creating Summation Report with Details section of this documentation.


Collapse All

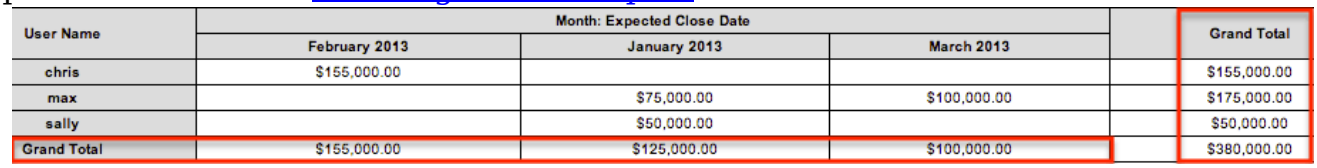
Month: Expected Close Date = January 2012, SUM: Opportunity Amount = $75,000.00

| Opportunity Name | Opportunity Amount | Expected Close Date | Sales Stage |
|---|---|---|---|
| Southern Realty - 1000 units | $45,000.00 | 01/12/2012 | Closed Won |
| B.C. Investing International - 1000 units | $30,000.00 | 01/30/2012 | Closed Won |

Month: Expected Close Date = February 2012, SUM: Opportunity Amount = $65,000.00

Matrix Report Result

The Matrix report groups the fields based on the group by fields and displays the summary for specific numeric-type field values that you select. The report result displays the data in a grid table with row and column headers. If you selected three group-by columns, then you will have the option to choose specific report layout's (e.g. 1x2 and 2x1) on the Report Details step. The 1x2 layout option will display the data for the first group-by field in a row and display the data for the other two group-by fields in columns. The 2x1 layout option will display the data for the first two group-by fields in rows and display the data for the third group-by field in a column. The report results will show the grand total for each field row on the table as well as for each column.To view an example Matrix report result, please refer to the Creating Matrix Report section of this documentation.



| User Name | Month: Expected Close Date | | | | Grand Total |
|---|---|---|---|---|---|
| | February 2013 | January 2013 | March 2013 | | |
| chris | $155,000.00 | | | | $155,000.00 |
| max | | $75,000.00 | $100,000.00 | | $175,000.00 |
| sally | | $50,000.00 | | | $50,000.00 |
| Grand Total | $155,000.00 | $125,000.00 | $100,000.00 | | $380,000.00 |

## Viewing Currency Fields

When the viewing user's profile has the Show Preferred Currency option selected, all currency values will be displayed in reports using the user's preferred currency. The values will use the current conversion rate set in Admin > Currencies at the

time the report is run. This means that the displayed value may not be historically correct for closed business since the conversion rate of the user's preferred currency may have changed since the purchase was completed.

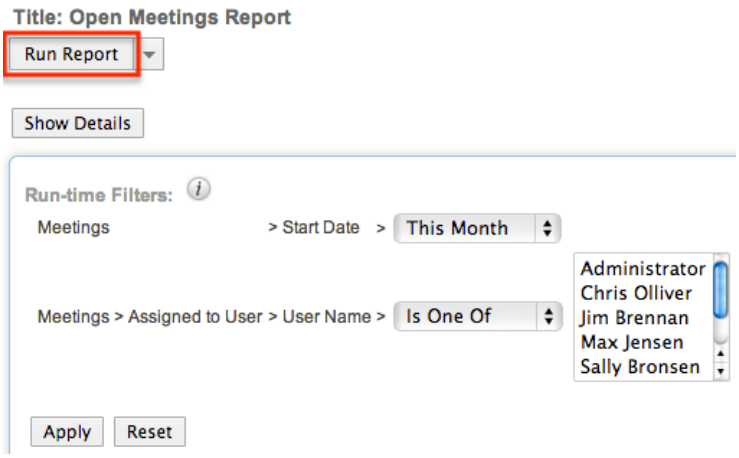
When the user does not have this option selected, reports will display all currency values in the system's default currency. To keep amounts historically accurate, the conversion rate will only update on on currency fields when the business is still open and under the following scenarios:

- The record undergoes a save event (e.g. mass update, manual save, etc.) and the record's currency has a different conversion rate defined in Admin > Currencies than is currently saved.
- An administrator updates the currency exchange rate under Admin > Currencies. This will trigger a scheduled job which updates all records saved with that currency to the new rate.

For more information about currency exchange rates, please refer to the Currencies documentation in the Administration guide.

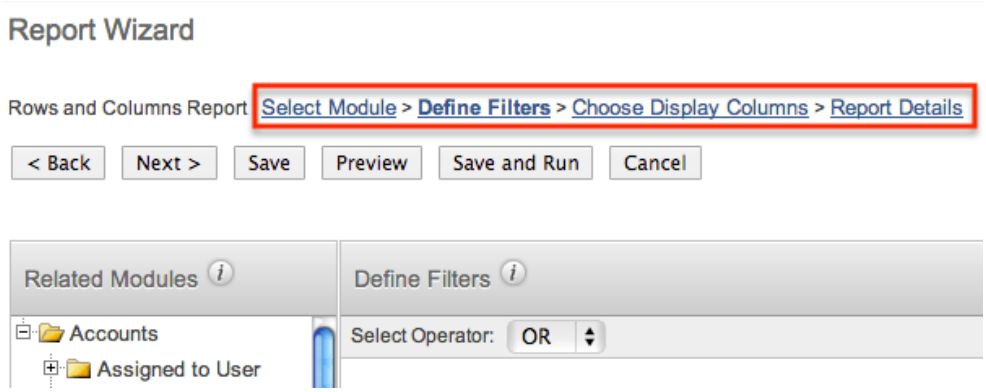
## Running Reports

Once the reports are generated and saved in Sugar, you can view the report results at any time. While viewing the report's detail view, there may be times when you need to re-run the report to generate new report results. The Run Report button on the upper left of the report's detail view allows you to refresh and run the report to re-generate report results. For example, if you make a change to the run-time filter on the report, you can click "Run Report" to generate the report based on the new filter values. For more information on run-time filters, please refer to the Run-Time Filters section of this documentation. You can also click "Run Report" each time you want to re-generate the report to capture new records not included in the current report results.



# Editing Reports

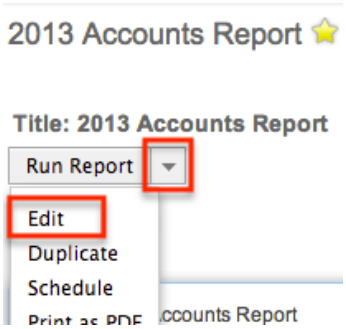
Reports may be edited at any time to update or add information to the report. There are various methods of editing the report from the Reports detail view, Reports list view, and dashlets. Regardless of where you initiate the edit from, you will always go through the Report Wizard to make the necessary changes to your report. You can edit the report by going through the Report Wizard step-by-step by clicking the Back and Next button or clicking the link (e.g. Define Filters, Choose Display Columns, Choose Display Summaries, etc.) at the top of the Report Wizard to edit a specific step. Once the changes are complete, click "Save and Run" to preserve the changes made and generate the report.




Please note that your ability to edit reports in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

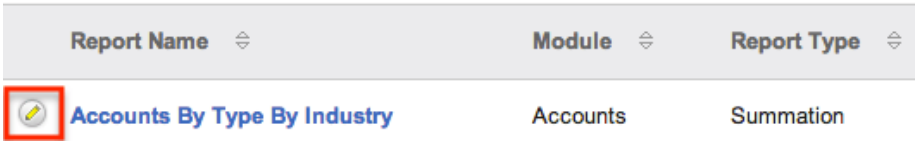
## Editing Via Detail View

You can edit reports via the detail view by clicking "Edit" in the Actions menu on the upper left of the page. This will open the Report Wizard where you can make the necessary updates to the various steps (e.g. Define Filters, Define Group By, Choose Display Columns, Choose Display Summaries, etc.). Once the changes are complete, click "Save and Run" to preserve the changes made and generate the report.



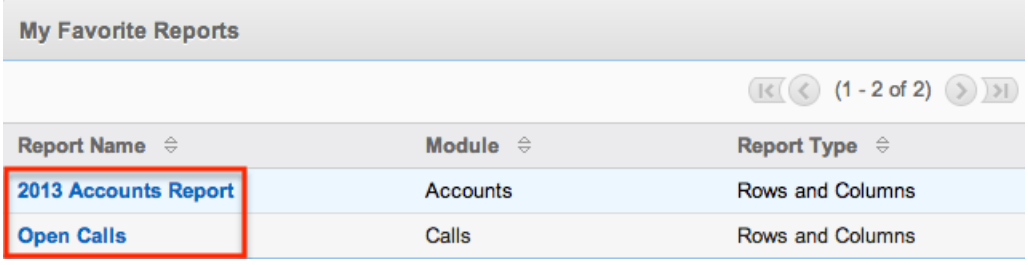

## Editing Via List View

You can edit reports via the list view by clicking the Pencil icon to the left of each report's name. This will open the Report Wizard where you can make the necessary updates to the various steps (e.g. Define Filters, Define Group By, Choose Display Columns, Choose Display Summaries, etc.). Once the changes are complete, click "Save and Run" to preserve the changes made and generate the report.

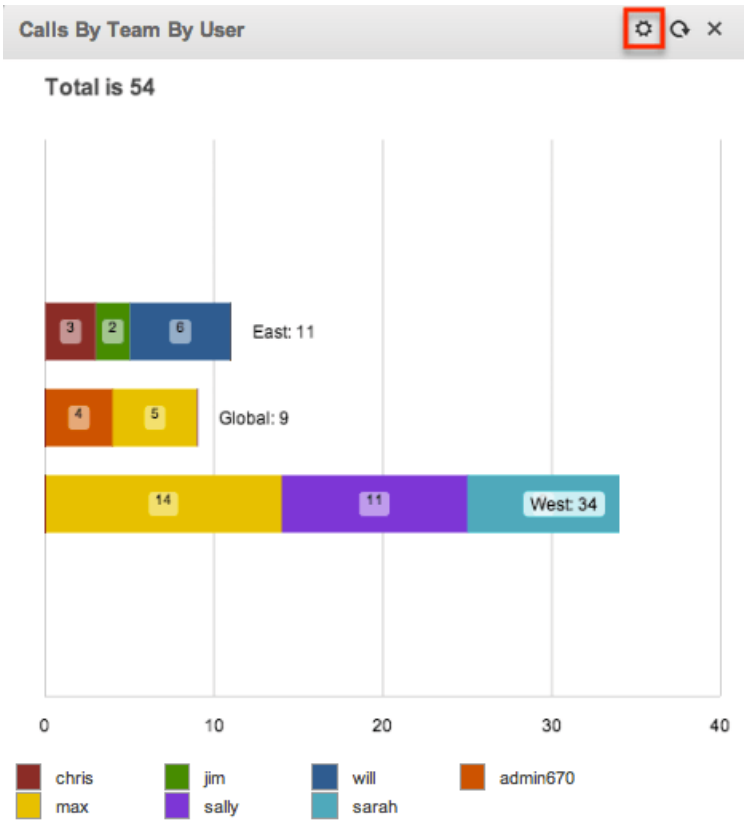



## Editing Via Dashlet

There are various ways to edit reports via the dashlets on the Home page. For the My Favorite Reports dashlet you can click the reports name to open the reports detail view then click "Edit" in the Actions menu to make the necessary changes. Once the changes are complete, click "Save and Run" to preserve the changes made and generate the report.




For the Report Chart dashlets, you can click the Edit icon at the top of the dashlet menu bar to open the reports detail view then click "Edit" in the Actions menu to make the necessary changes. Once the changes are complete, click "Save and Run" to preserve the changes made and generate the report.




# Deleting Reports

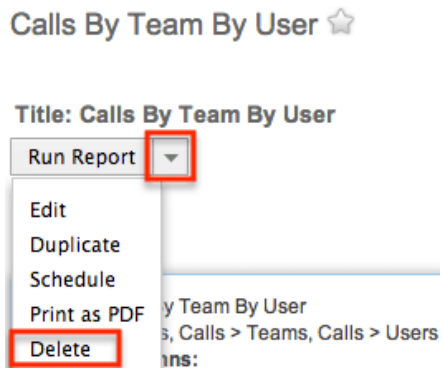
If a report is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Reports detail view or list view. Deleting via the detail view allows you to delete a single report while the list view allows for mass deleting multiple reports at once.

Please note that your ability to delete reports in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

## Deleting Via Detail View

Use the following steps to delete a report via the detail view:

1. Navigate to a report's detail view.
2. Select "Delete" from the Actions menu.

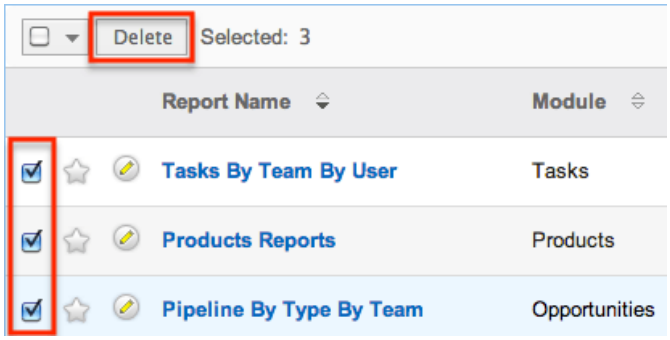



3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

### Mass Deleting Via List View

Use the following steps to delete one or more reports via the list view:

1. Navigate to the Reports list view by clicking the Reports module tab.
2. Use the Basicor Advanced Search to find the reports you wish to delete.
3. Select the desired reports individually or using the checkbox dropdown's options.
4. Click the Delete button.




5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Sugar allows you to select up to 1000 records at a time for deletion. If you desire to delete more than 1000 records, you will need to perform the deletions in several batches.

## Exporting Reports

Sugar's Export option allows users to download the data in reports as a .CSV (comma-separated values) file. Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation. This may be useful when needing to use the report data with other software such as Microsoft Excel or to

update existing records by creating a report (including Record ID's), exporting, making changes, then importing the altered data back into Sugar. For more information on updating existing records via import, please refer to the Import documentation.Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a report with a large amount of data. If you encounter an error when performing this action, we recommend breaking up the report in smaller batches.



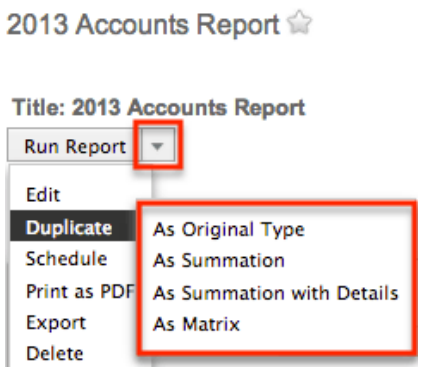

Please note that your ability to export reports from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

## Duplicating Reports

You can create a new report by duplicating an existing report in Sugar. The duplicate option is useful if the report you are creating has similar information to an existing report, so there is less new data for you to enter. You have the option of duplicating the report as the original report type that you are currently viewing or any of the other three report types.

The following steps cover creating a report by duplicating an existing Rows and Columns-type report as an example:

1. Navigate to a report's detail view.
2. Click the Actions menu and select "Duplicate".
3. Choose the report type you would like the duplicated report to be.




4. Go through the Report Wizard to select and enter new data as necessary then enter a new name for the report and save.
    - Please note that if you select a report type other than the original type, there may be additional or less steps in the Report Wizard to complete and you may need to edit the report as necessary to meet the specific report type requirements.

## Scheduling Reports

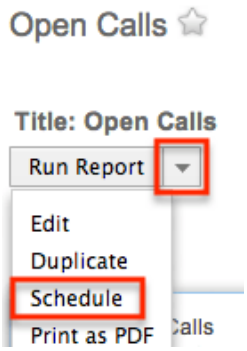
Reports in Sugar can be scheduled to be emailed to users periodically based on specified date and time intervals. Please note that each individual user has to schedule the report in their Sugar account in order for the reports to be delivered to them. Sugar will run the report at the specified interval based on the set time zone in user preferences and sends it as a PDF file to your email address on file. Please note that the outbound mail server for the system as well as the user's email settings must be configured properly in order for the reports to be delivered successfully. For more information on setting up the system email settings, please refer to the Email documentation in the Administration guide. For more information on setting up your user preferences' email settings, please refer to the

The Run Report Generation Scheduled Tasks scheduler in Sugar processes all scheduled reports to be delivered to the user at the scheduled interval. By default, the report scheduler is set as "Inactive" for new Sugar installations. Administrators must check to make sure that the Run Report Generation Scheduled Tasks scheduler is active and the settings (e.g. interval) are configured properly. F or example, if the scheduler is set to trigger once per day and a user schedules a report to be delivered every hour, the report will only be delivered once each day due to the set interval in the scheduler. The administrator must change the interval for the scheduler to run every 1 hour in order for the users report to be processed and delivered per their scheduled interval.For more information on configuring schedulers, please refer to the Schedulers section of the System documentation.

### Scheduling Via Detail View

Use the following steps to schedule the report via the detail view:

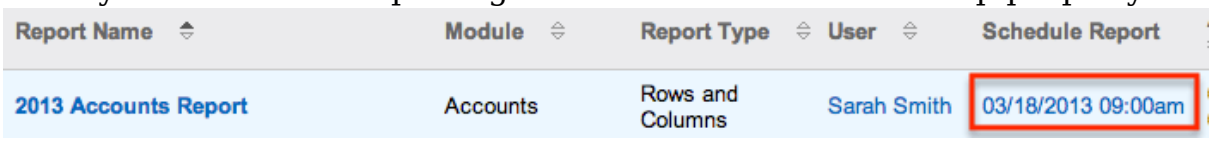
1. Navigate to a report's detail view.
2. Select "Schedule" from the Actions menu.




3. Enter the start date/time and select the time interval for report delivery. Check the Active checkbox then click "Update Schedule" to schedule your report.
    - Please note that you must mark the Active box in order to activate the report schedule.



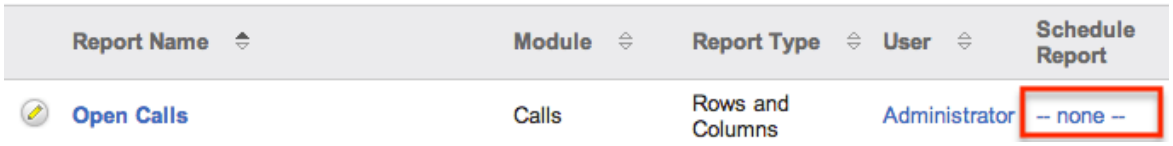

Once the report is scheduled successfully, the date and time for the scheduled report will appear in the list view row for the specific report. If you do not see the scheduled date and time under the Schedule Report column in the list view, then check your scheduled report again to make sure it was set up properly.



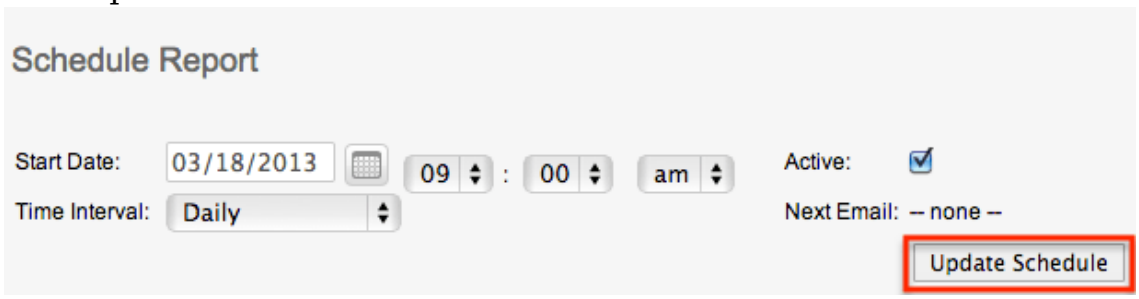

## Scheduling Via List View

Use the following steps to schedule the report via the list view:

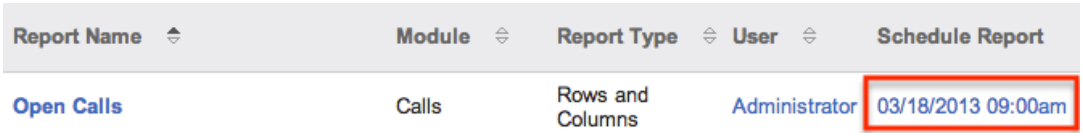
1. Navigate to the Reports list view by clicking the Reports module tab.
2. Use the Basic or Advanced Search to find the reports you wish to schedule.
3. Go to the Schedule Report column for the specific report in the list view and click on the --none-- link.




4. Enter the start date/time and select the time interval for report delivery. Check the Active checkbox then click "Update Schedule" to schedule your report.
    - Please note that you must mark the Active box in order to activate the report schedule.




Once the report is scheduled successfully, the date and time for the scheduled report will appear in the list view row for the specific report. If you do not see the scheduled date and time under the Schedule Report column in the list view, then check your scheduled report again to make sure it was set up properly.




## Printing Reports as PDFs

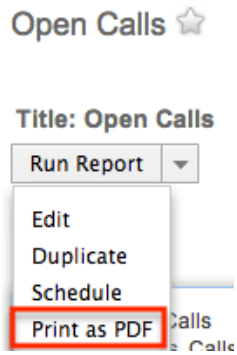
Sugar's Print as PDF option in the Reports module allows users to download the reports to PDF files and save on their local machine. This may be useful when needing to email the file to other members of the team to share the report data or to keep track of key historical data from the system. You can also view charts on the downloaded PDF files for Report types (e.g. Summation Report with Details, Summation Report, Matrix Report) with chart options.

Please note that your ability to print reports as PDF from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Print as PDF option.

Use the following steps to print reports as PDF's via the Reports detail view:

1. Navigate to a report's detail view.

2. Select "Print as PDF" from the Actions menu.




3. Open the downloaded PDF file to view the report and save to your local machine if you wish.

## Favoriting Reports

Each Sugar user has the option to designate their own favorite reports which are important or will be viewed often so that they can easily be accessed via Advanced search or from the Reports module tab. Once reports are marked as favorites, use the My Favorite Reports checkbox in the Reports Advanced Search to retrieve your favorites or select from your most recent favorites directly from the Reports module tab.

### Favoriting Via List View

Use the following steps to mark reports as favorites via the Reports list view:

1. Navigate to the Reports list view by clicking the Reports module tab.
2. Use the Basic or Advanced Search to find the Report records you wish to mark as favorites.
3. Mark the star icon on the left of each desired report's row.
4. To remove the report as a favorite, click the star again to revert it to white.




### Favoriting Via Detail View

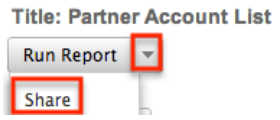
Use the following steps to mark records as favorites via the Reports detail view:

1. Navigate to a report's detail view.
2. Click the star icon to the right of the report's name in the upper left of the detail view to designate it as a favorite.
3. To remove the report as a favorite, click the star again to revert it to white.




## Sharing Reports

Individual reports can be shared by generating an URL that can be easily emailed right from the application to share with other user(s). In record view, clicking the Share button from the action menu will create an email with the URL of the report. Enter the recipient(s) and send the email to share the report.

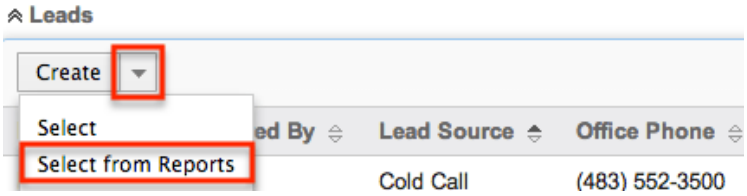



If the recipient is not logged into the application, then they will be prompted to login first before redirecting to the record view. Please note that recipients will only be able to view the shared record as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

## Adding Report Results to Target Lists

A target list consists of a group of individuals or organizations you wish to be included or excluded on a mass marketing campaign. These targets are typically identified based on a set of predetermined criteria such as being a prospect or existing customer, age group, industry, etc. The Reports module gives users the ability to add a large number of records (e.g. Contacts, Leads, Accounts, etc.) to a target list at once instead of selecting them one-by-one. For example, if you need to add all leads in the state of California to your target list, you can create a report based on the Leads module filtered by the Primary Address State field (e.g. CA). Once the report is created and saved, you can navigate to the Target Lists module to add the report results to the specific target list. Go down to the Leads subpanel in the Target List's detail view, click the Actions menu, then choose "Select from Reports". Select the saved lead report from the pop-up window and all lead records

from the selected report will be added to the target list.




For more information on adding records to target lists, please refer to the Target Lists documentation. Sugar allows up to 1000 records to be added at a time when adding to a target list. If you desire to add more than 1000 records to a target list, you will need to create the reports in several batches.

Last Modified: 02/02/2017 06:52pm

# Advanced Reports

## Overview

Advanced reports allow users to create custom reports using a single or a combination of SQL statements to directly query your Sugar database. Although the Reports module may be used to create many kinds of reports, users with SQL knowledge may use advanced reports to craft direct database queries for more flexible and extensible reporting.

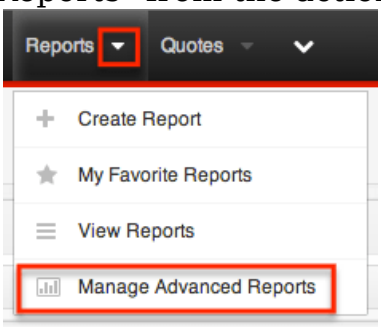
Advanced reports are a combination of three related modules:

- Custom Queries : Custom query records contain the SQL statement used to pull information from the database.
- Data Formats : Data format records describe how to format and display the results of the related custom query. Data formats may also be interrelated to create child/parent combinations of queries.
- Advanced Reports : Advanced report records serve as headers for the report and may display one or more data format. The advanced report record may also be scheduled to be automatically run and emailed to a user.

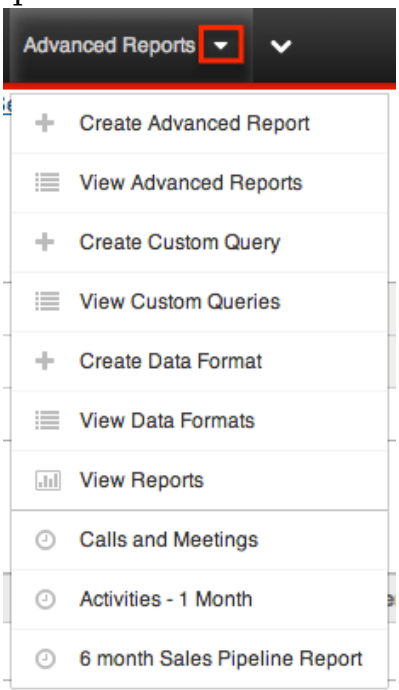
Note: You must be an administrator in order to create, edit, and delete custom queries. Data formats and advanced reports may be created and manipulated by non-admin users according to their team access. Admin users wishing to build advanced reports must first be familiar with SQL and Sugar's database structure in order to write the necessary custom queries.

# Advanced Reports Module Tab

Advanced Reports may be accessed by navigating to the Reports module which is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access triangle to the right of the Reports tab, then click "Manage Advanced Reports" from the actions menu.




From within the Advanced Reports module, clicking the Advanced Reports tab in the navigation bar will display the list view. Click the triangle to the right of "Advanced Reports" to access the Actions menu. Below the Actions menu is the Recently Viewed menu displays the three advanced reports you have most recently opened.




The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|---|---|
| Create Advanced Report | Opens the edit view layout to create a new advanced report |

| | |
|---|---|
| View Advanced Reports | Opens Advanced Reports list view to search and display advanced reports |
| Create Custom Query | Opens the edit view layout to create a new custom query |
| View Custom Queries | Opens Custom Queries list view to search and display custom queries |
| Create Data Format | Opens the edit view layout to create a new data format |
| View Data Formats | Opens Data Formats list view to search and display custom queries |
| View Reports | Opens the Reports tab to create and view standard reports |

# Creating Advanced Reports

Since a single advanced report consists of records from three different modules, the following instructions will step through creating a record within each module and relating those records to generate a report. First, a custom query record will be created, then a data format, and finally an advanced report record. The fields specific to each module are described prior to each set of creation instructions.

## Custom Query Fields

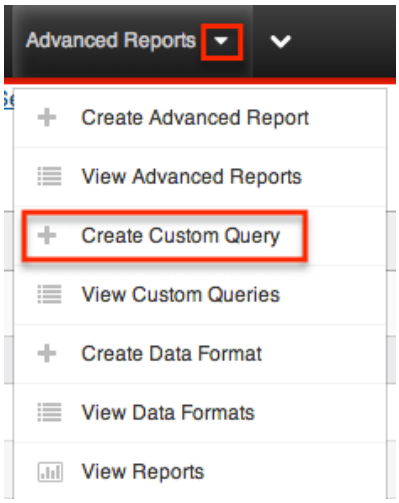
The Custom Query module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.

| Field | Description |
|---|---|
| Custom Query | The SQL select statement which will retrieve information from the database |
| Description | A description or other information about the custom query |
| Lock Query | Option to toggle editability of the Custom Query field |
| Query Name | The name of the custom query |
| Teams | The Sugar team(s) assigned to the custom query record |

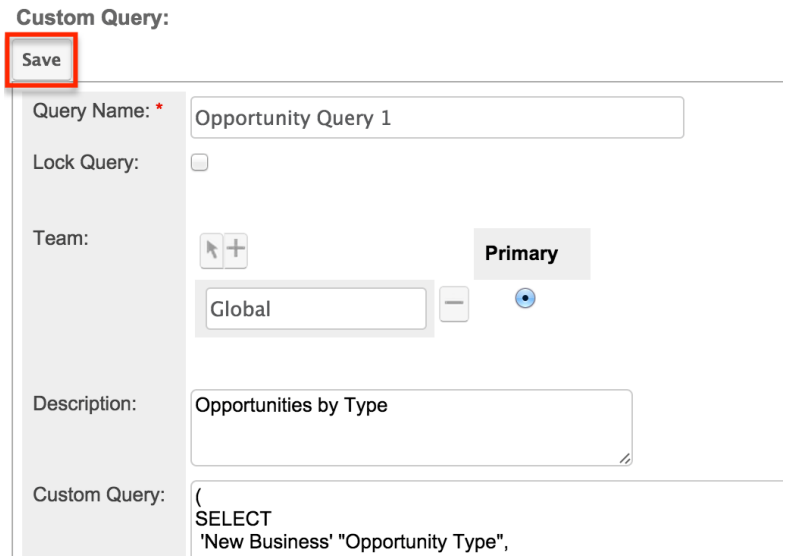
## Creating Custom Query Records

Advanced reports enable you to create reports using complex SQL queries that cannot be expressed in standard reports. The SQL query is contained in a custom query record. Each custom query record can be related to multiple data format records which allows it to be reused in multiple reports.

1. Click the triangle in the Advanced Reports module tab to open the actions menu and select "Create Custom Query".




2. Enter appropriate values for the fields in the edit view layout. All required fields will display a red asterisk and must be completed prior to saving. The SQL select statement you wish to run against the database should be input to the Custom Query field
3. Click "Save".




After you click "Save", Sugar will determine whether the SQL statement provided in the Custom Query field is valid. If it is not, Sugar will display an error message

and provide an opportunity for you to correct the SQL. The custom query record may not be saved unless the SQL statement is deemed valid by Sugar.

## Data Format Fields

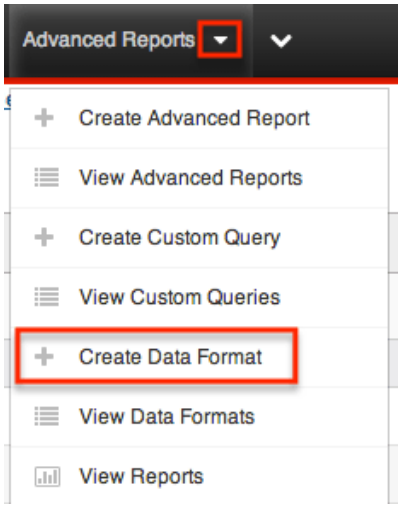
| Field | Description |
|---|---|
| Body Background Color | The color of the background of the data cells in the report display |
| Body Text Color | The color of the text of the data in the report display |
| Combine with Previous Data Format | Specifies whether space should appear between this table and the previous data format's table when a report includes multiple data formats |
| Data Format Name | The name of the data format |
| Description | A description or other information about the data format |
| Exportable (CSV File Only) | Specifies whether this table is available to be exported as a CSV file |
| Font Size | The size of the font in the report output |
| Group with Previous Header | Specifies whether the column widths should match those of the previous data format's table when a report includes multiple data formats |
| Header Background Color | The color of the header background in the report display |
| Header Text Color | The color of the header text in the report display |
| Parent Data Format | When setting up interlocked queries, the parent data format containing the parent query of your current, child query and data format |
| Query Name | The custom query record which will be formatted by this data format |
| Report Name | The related advanced report record; this value automatically populates once linked to an advanced report |
| Sub/Child Query | When this data format is set as the parent format of a child record, the |

| | |
|---|---|
| | name of the child query will be automatically populated |
| Show Header | Specifies whether a row including column names should appear above data rows in the report display |
| Table Width % | The width of the table in the report display as a percentage or pixels |
| Teams | The Sugar team(s) assigned to the data format record |

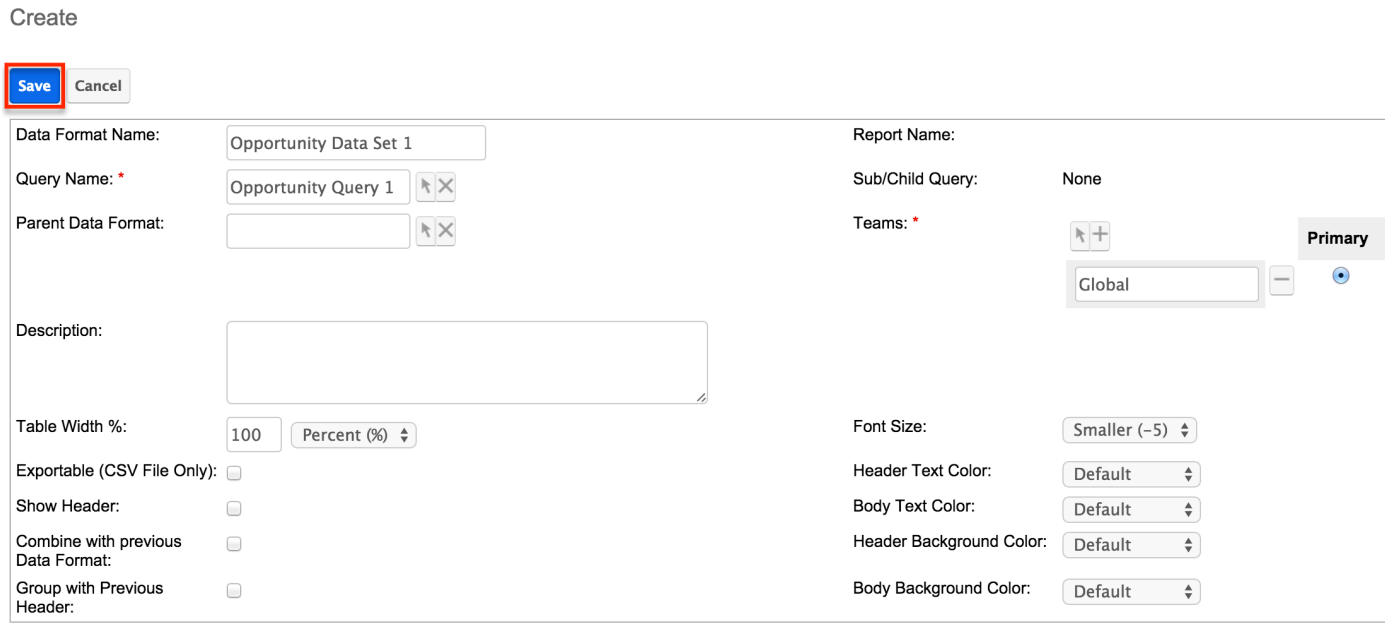
## Creating Data Format Records

A data format specifies report formatting details such as the text font, text color, and the background color for a particular SQL query contained in a custom query record. You can reference other data formats within a data format. The query contained in the referenced data format is considered to be the sub-query or the child-query. When a data format references another data format, the data formats are interlocked. Interlocked reports are useful to produce information from separate queries in a parent-child pattern. For more information, please refer to the Interlocked Reports section of this documentat

1. Click the triangle in the Advanced Reports module tab to open the actions menu and select "Create Data Format".




2. Enter appropriate values for the fields in the edit view layout. All required fields will display a red asterisk and must be completed prior to saving. For the Query Name field, type or select the custom query record created in the .
3. Click "Save".



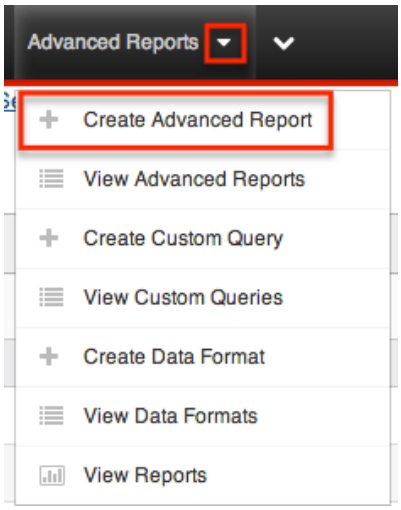

## Advanced Report Fields

The Advanced Reports module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.

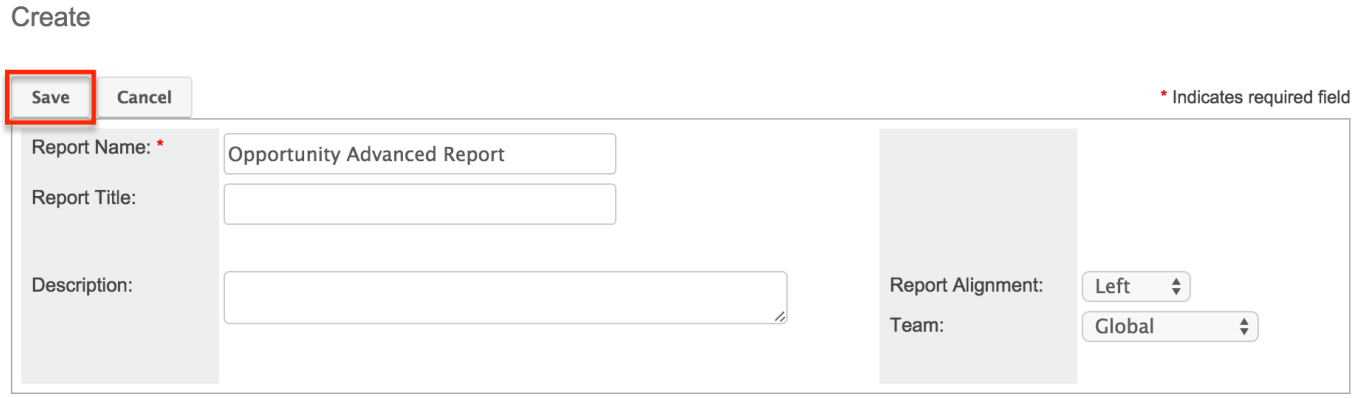
| Field | Description |
|---|---|
| Description | A description or other information about the advanced report |
| Report Alignment | The alignment of the advanced report text |
| Report Name | The name of the advanced report |
| Report Title | The title of the advanced report |
| Teams | The Sugar team(s) assigned to the advanced report record |

## Creating Advanced Report Records

1. Click the triangle in the Advanced Reports module tab to open the actions menu and select "Create Advanced Report".




2. Enter appropriate values for the fields in the edit view layout. All required fields will display a red asterisk and must be completed prior to saving.
3. Click "Save".




## Relating the Advanced Report and Data Format Records

After creating all three types of records as described above, use the following steps to relate the advanced report record to one or more data format records:

1. Click the Advanced Reports module tab to access the Advanced Reports list view.
2. Search for the advanced report record created in the steps above and click the record's name to open it in detail view.
3. Below the advanced report information, click the Select button.
4. Find the data format record created in the steps above and click the record's name to link it to the advanced report.

# Running Advanced Reports

Finally, click on "Run Report" and it will return a custom report populated with results from your custom query and displayed with your designated data format.

## Aggregating Queries on a Single Report

A single advanced report record may relate to one or more data format records, each of which includes its own query. The bottom of an advanced report detail view displays a list of data formats included in the report. When multiple data formats are included on a single report, their individual tables will be stacked. Two data format fields, "Combine with previous Data Format" and "Group with Previous Header" will affect how multiple data formats are displayed on a single report.

The following actions are available on an advanced report detail view for manipulating its related data formats:

- Create New : Create a new data format record which will be automatically related to this advanced report
- Select : Select an existing data format record to relate to this advanced report; only data formats which are not already related to a report and do not have a parent data format will be available for selection.
- Up : Move a data format's table to a higher position in a report containing several data formats.
- Down : Move a data format's table to a lower position in a report containing several data formats.
- Edit : Open the data format in edit view in order to make changes
- Delete : Remove the data format from this report; the data format record will not be deleted

Note: data format record can only belong to one advanced report. If you wish to use one custom query with several reports, you must create a separate data format record for each report - each of which may relate to the single custom query record. Also, data formats which have a parent data format (as displayed in the Parent Format field) are considered child data formats and may not be directly added to a report. Parent data formats which have child data formats are eligible to be included on a report.

### Adding Multiple Data Formats to a Report

For our example, we will add two different data formats to a single report. First we want to show a list of each of the sales representatives along with a count of how many calls and meetings they made in the last week. This is the first query and the first data format which we have named "Activity Counts".

Beneath this

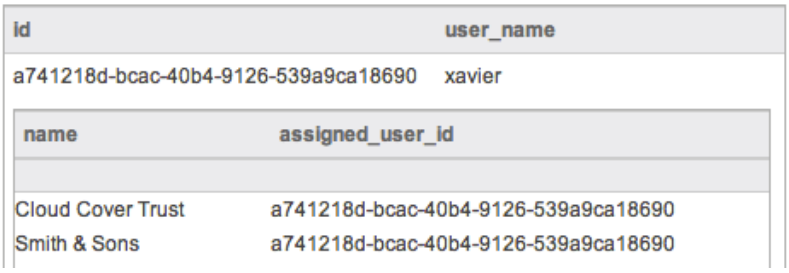
## Interlocking Parent/Child Queries

Sugar allows you to interlock two queries in a parent/child relationship by relating two data format records. This allows for more complex report results that are displayed in a parent/child format mirroring the queries' relationship. Sugar will first run the parent query, then, for each row of the parent query, it will run the child query.

Use the following steps to interlock a pair of simple queries as an example:

1. Create a custom query record called "All Users Query" with the following SQL statement:
   Select id, user_name from users
2. Create a second custom query record called "Accounts By Users Query" with the following SQL statement:
   Select name, assigned_user_id from accounts where assigned_user_id = '{sub}id{sub}'
3. Create a data format record called "All Users Format" with the Query Name field set to "All Users Query".
4. Create a data format record called "Accounts By Users Format" with the Query Name field set to "Accounts By Users Query" and the Parent Data Format field set to "All Users Format".
5. Create an advanced report record.
6. From the advanced report's detail view, use the Select button to choose "All Users Format".
7. Click the Run Report button.

The '{sub}id{sub}' is inserted to the child query to refer to the parent query's current result row. In this example, Sugar will generate a list of user names and id's. Below each user row, a list of accounts assigned to that particular user will appear. The child query is returning assigned_user_id to help make the functionality clear.



| id | user_name |
|---|---|
| a741218d-bcac-40b4-9126-539a9ca18690 | xavier |

| name | assigned_user_id |
|---|---|
| Cloud Cover Trust | a741218d-bcac-40b4-9126-539a9ca18690 |
| Smith & Sons | a741218d-bcac-40b4-9126-539a9ca18690 |

Please note that a child data format cannot be run from it's own record nor added to an advanced report record. Only by running its parent data format or adding its parent data format to a report will the child query's results be displayed.

Note: Only two data formats may be interlocked at a time. Chains of three or more data format records will cause Sugar not to recognize the queries three or more levels deep.

## Column-Level Formatting

Each data format includes formatting options such as color, size, etc which affect the entirety of the custom query's table and header. These options are available while editing the data format record and include these fields. In addition, each column of a query's table may be formatted individually using the options available on the detail view of a data format record. Please note, in order for these options to be available, the related custom query must be returning at least one row.

### Formatting a Column's Header

Once you have created a data format record including choosing a custom query record which will return at least one row of data, a table will be displayed at the bottom of the data format record's detail view. The following options are available for formatting a particular column's header:

| Field | Description |
|---|---|
| Display Name | Replaces the text of the column's header which defaults to the column name specified in the custom query's SQL statement |
| Display Type | The display type of this column's header text |
| Font Size | The size of this column's header text |
| Font Style | Specifies if the column's header text should be bolded or italicized |
| Format Type | The displayed format (Month, Quarter, Year, etc.) of this column's header text |
| Header Background Color | The background color of this column's header |
| Header Text Color | The text color of this column's header |
| Wrap Text | Specifies if long text in this column's |

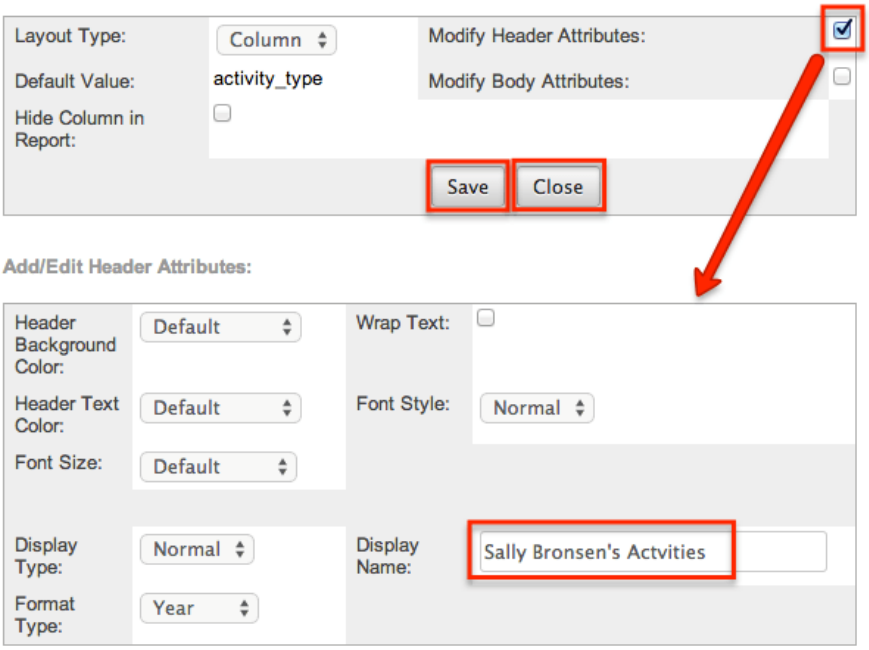
| | |
|---|---|
| | header should wrap to multiple lines |

The following steps will walk through modifying the header to display a desired column name rather than the field name shown by default:

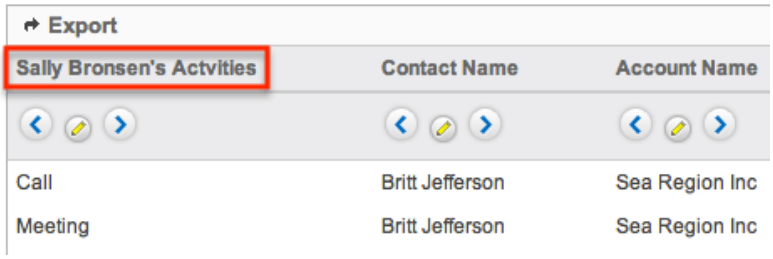
1. Navigate to the detail view of a data format record who's custom query is returning at least one row of data.
2. Click the pencil icon above the table column you wish to format.




3. Check the "Modify Header Attributes" checkbox in the pop-up window.
4. Type "Sally Bronsen's Activities" in the Display Name field and make any other desired modifications.
5. Click "Save" then "Close".




After closing the pop-up window, the table will refresh to show the changes you made to the column. For our example, the column name "activity_type" has been replaced with the text "Sally Bronsen's Activities".



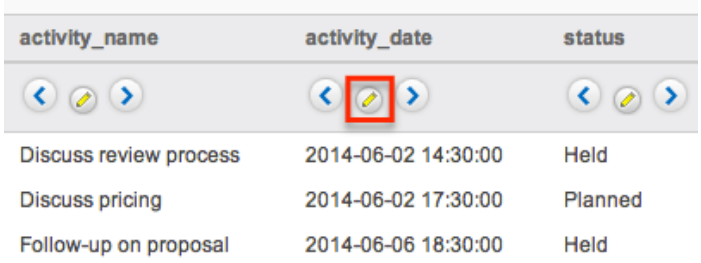

## Formatting a Column's Body

Once you have created a data format record including choosing a custom query record which will return at least one row of data, a table will be displayed at the bottom of the data format record's detail view. The following options are available for formatting a particular column's data cells:

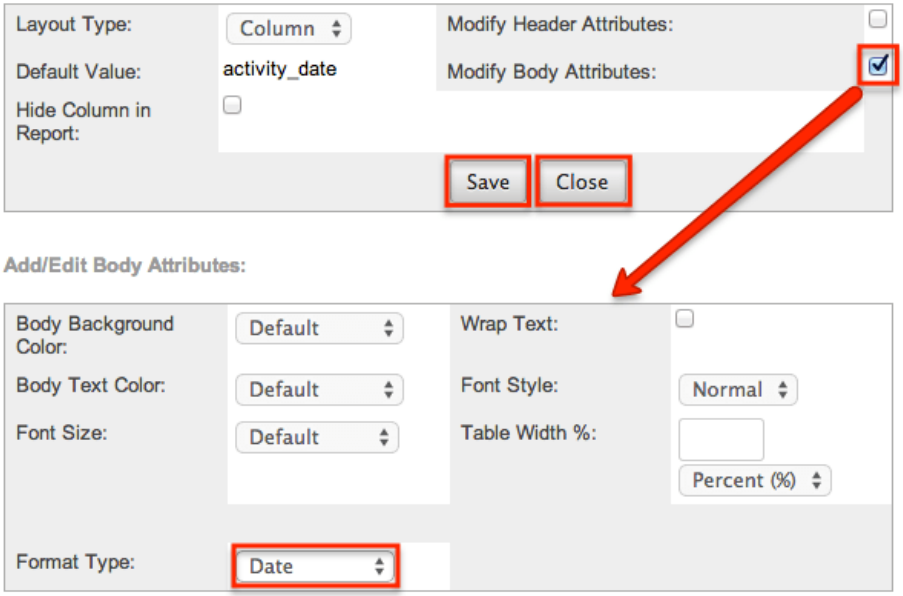
| Field | Description |
|---|---|
| Body Background Color | The background color of this column's data cells |
| Body Text Color | The text color of this column's data cells |
| Font Size | The size of this column's data cell text |
| Font Style | Specifies if this column's data cell text should be bolded or italicized |
| Format Type | Specifies if this column's data cell text should be formatted as plain text, currency, date, or datetime values |
| Table Width | The width of this column's data cells and header as a percentage of the table width or as an absolute number of pixels |
| Wrap Text | Specifies if long text in this column's data cells should wrap to multiple lines |

The following steps will walk through modifying a column to display a column of datetime data as a simple date value as an example:

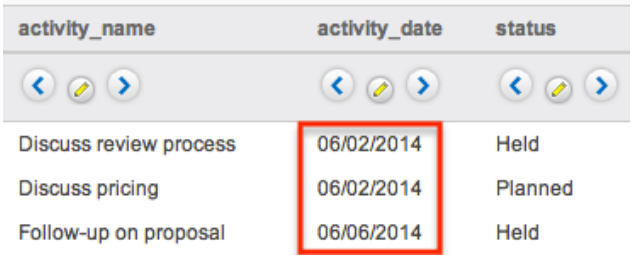
1. Navigate to the detail view of a data format record who's custom query is returning at least one row of data.
2. Click the pencil icon above the table column you wish to format.




3. Check the "Modify Body Attributes" checkbox in the pop-up window.
4. Choose "Date" for the Format Type field and make any other desired modifications.
5. Click "Save" then "Close".




After closing the pop-up window, the table will refresh to show the changes you made to the column. For our example, the column of database datetime values will now be displayed as simple date values.

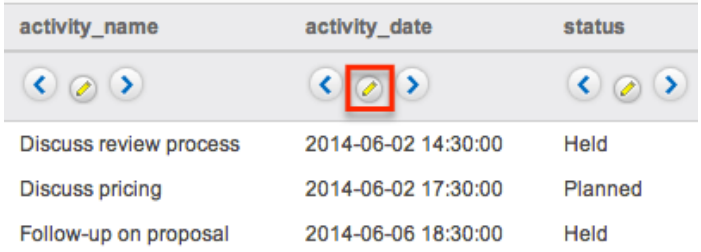



## Hiding Columns

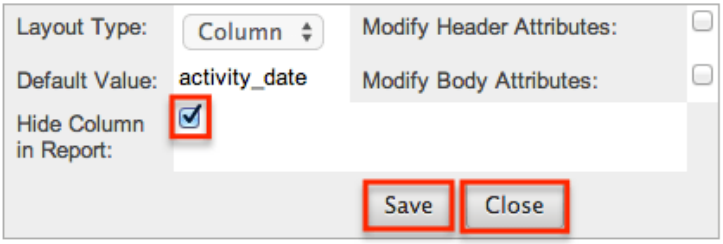
If an individual column should not be displayed in a report's output, the column may be marked as hidden on the data format record. This will prevent it from being displayed when running an advanced report which includes the data format.

Use the following steps to hide a column from a report's output:

1. Navigate to the detail view of a data format record who's custom query is returning at least one row of data.
2. Click the pencil icon above the table column you wish to format.




3. Select the Hide Column in Report checkbox.
4. Click "Save" then "Done".

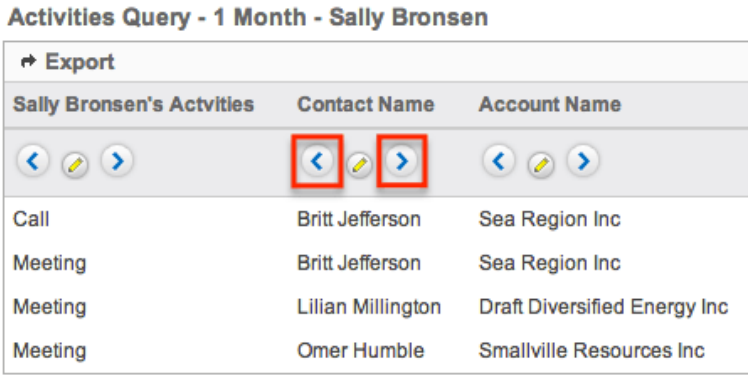



## Reordering Columns

The default column order of a table is determined by the SQL statement used in the custom query record. The column order can be changed at the data format record level when a different order is desired on the data format or in the final advanced report record.

Use the following steps to change the column order for a data format record:

1. Navigate to the detail view of a data format record who's custom query is returning at least one row of data.
2. At the top of a column, click the right arrow to move the column one position right. Click the left arrow to move it one position left.



# Scheduling Advanced Reports

Advanced reports can be scheduled to be emailed to users periodically based on specified date and time intervals. Please note that each individual user has to schedule the report in their Sugar account in order for the reports to be delivered to them. Sugar will run the advanced report at the specified interval based on the set time zone in user preferences and send it as a PDF file to your email address on file.

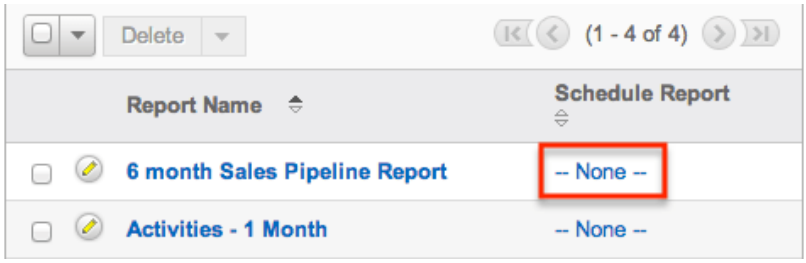
The outbound mail server for the system as well as the user's email settings must be configured properly in order for the reports to be delivered successfully. For more information on setting up the system email settings, please refer to the Email documentation in the Administration guide. For more information on setting up your user preferences' email settings, please refer to the Getting Started documentation.

The Run Report Generation Scheduled Tasks scheduler in Sugar processes all scheduled advanced reports to be delivered to the user at the scheduled interval. By default, this report scheduler is set as "Inactive" for new Sugar installations. Administrators must check to make sure that the Run Report Generation Scheduled Tasks scheduler is active and the settings (e.g. interval) are configured properly. F or example, if the scheduler is set to trigger once per day and a user schedules a report to be delivered every hour, the report will only be delivered once each day due to the set interval in the scheduler. The administrator must change the interval for the scheduler to run every 1 hour in order for the user's report to be processed and delivered per their scheduled interval. For more information on configuring schedulers, please refer to the Schedulers section of the System documentation.

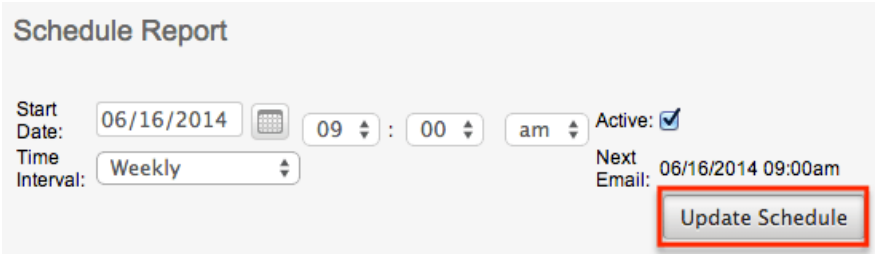
## Scheduling Via List View

Use the following steps to schedule an advanced report via the list view:

1. Navigate to the Advanced Reports list view.
2. Click "-- None --" in the Schedule Report column of the report you wish to schedule. If you wish to update an existing schedule, click the date shown in the Schedule Report column.




3. In the pop-up window, enter the start date/time and select the time interval for report delivery. Check the Active checkbox then click "Update Schedule" to schedule your report.
    - Please note that you must mark the Active box in order to activate the report schedule.




Once the report is scheduled successfully, the date and time for the scheduled report will appear in the list view row for the specific advanced report.




## Exporting Data Formats

Sugar's Export option allows users to download the data in individual data format tables as a .csv (comma-separated values) file. This may be useful when needing to use the report data with other software such as Microsoft Excel. In order for the tables belonging to an advanced report or data format record to be available for export, the data format record's "Exportable (CSV File Only)" field must be checked.Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a table with a large amount of data. If you encounter an error when performing this action, we recommend breaking up the queries in smaller batches. For more information on exporting records in Sugar, please refer to the Export documentation.Please note that your ability to export reports from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

### Exporting Via Advanced Reports

Use the following steps to export a data format table from an advanced report:

1. Open an advanced report record in detail view by selecting it from the Advanced Reports list view or the list of recently viewed reports in the actions menu.
2. Click "Run Report" at the top of the detail view.
3. Click "Export" above the desired table in order to start the download.
   Note: If the "Export" link is not displayed, you must edit the data format record and check "Exportable (CSV File Only)".

### Exporting Via Data Formats

Use the following steps to export a data format table from a data format record:

1. Navigate to the detail view of a data format record who's custom query is returning at least one row of data.
2. Click "Export" above the desired table in order to start the download.
   Note: If the "Export" link is not displayed, you must edit the data format record and check "Exportable (CSV File Only)".

Last Modified: 09/26/2015 05:23pm

# Processes

## Overview

Sugar's Processes module is the user-facing portal to Sugar Process Author™, a business process management tool which enables administrators to streamline common business processes by managing approvals, sales processes, call triaging, and more. A business process is a set of logically related tasks that are performed in order to achieve a specific organizational goal. It presents all of the tasks that must be completed in a simplified and streamlined format.

Sugar Process Author empowers Sugar administrators to automate vital business processes for their organization. Some examples of business processes that can be automated using Sugar Process Author include invoice approvals, lead routing, customer service case routing, and automated reminders and escalations. This documentation will cover how to use the Processes module, as well as the various actions and options available from within the module. For more information on how administrators can create and configure processes, please refer to the

Process Author documentation in the Administration Guide.

Note: Sugar Process Author is exclusive to Enterprise and Ultimate editions of Sugar 7.6.x and later.

## Viewing Processes

There are two places where regular users can view processes in Sugar: the Processes dashlet and the Processes module list view. The Processes module is the only Process Author module that is visible to regular users. From the Processes dashlet and module list view, you will only see running processes if there is anything for you to approve or review.

### Viewing Via Dashlet

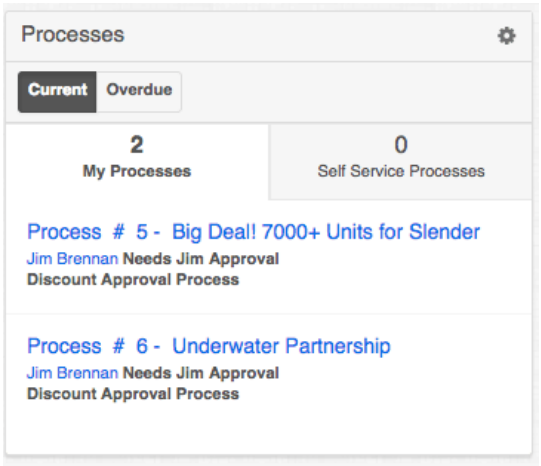
All users who may be engaged in a process must place the Processes dashlet on their home screens. Process users will not receive an email notification when an activity is ready for them (unless the administrator has explicitly configured this). Instead, open, running processes waiting to be acted upon by the logged-in user will be listed in the Processes dashlet. This dashlet was designed to make it easy for users to know when it is their turn to participate in a process and to take the appropriate action.

Note: Users (including administrators) will see only the processes that immediately require their attention in the Processes dashlet.

To add a Processes dashlet, please refer to the Adding Dashlets section of the Intelligence Pane documentation, choosing "Processes" from the Add a Dashlet page.




After saving the dashlet and its containing dashboard, the dashlet will offer several Process-specific filtering tools:




- Current : Click on this button to view all processes that are running within the expected timeframe.
- Overdue : Click on this button to view all processes that have a due date in the past. The label "Overdue" and the due date will be displayed adjacent to the Process description.
- My Processes : Enable this tab to view only the running processes upon which the logged-in user must act. To execute the Process, click on the name of the process. Please note that admin users can not see processes running for other users via the dashlet. To access the system's exhaustive list of running and completed processes, please refer to the Process Management section of the Administration guide.
- Self Service Processes : Enable this tab to view only the running processes in the queue to be claimed by a user. Self-Service processes are configured inside the User Activity element settings of the related process definition.
- Process Description : Running processes are displayed in list view format with descriptive fields including the unique process number, the name of the affected Sugar record, the process title, the responsible user's name, and the label of the relevant process step.
- Due Date : When a due date exists it will appear adjacent to the process description.

To execute a process from the Processes dashlet, please refer to the Executing Processes section of this documentation.

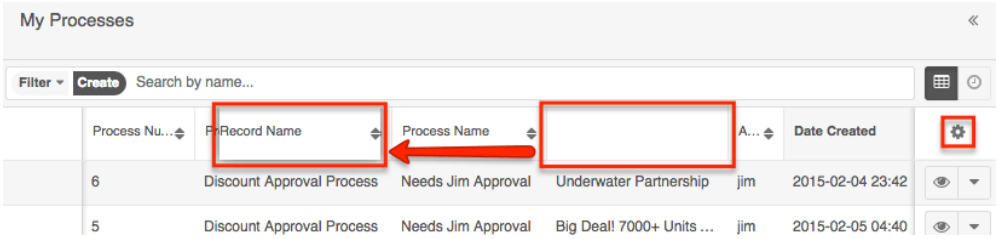
## Viewing Via List View

The Processes list view displays all running processes that require the logged-in user to take approve/reject or view/edit action and that meet the current search criteria. Users will not see processes for any other user – even if the other user is a direct report or a member of the same team. To access the list view, simply click the Processes module tab. The list view shows key process fields, you can click the

task's name to open the record view.

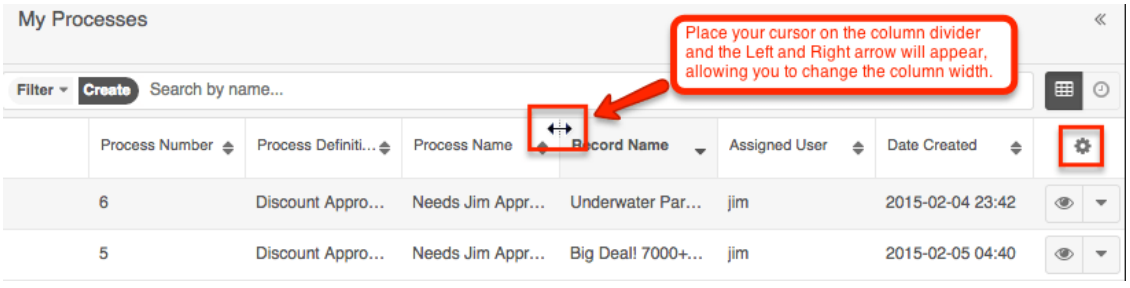
## Column Reordering

List view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the default column order.




## Column Resizing

Users can easily adjust the size of columns in the Processes list view per their viewing preference. Simply place your cursor on the column divider, and when the left-and-right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies. You can reset the column width back to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the current list view is different from the default column width.




## Column Sorting

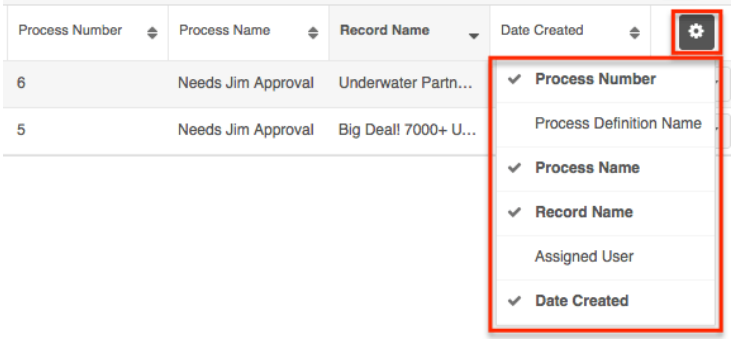
List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting

will have a pair of arrows.

Note: List views may only be sorted by one column at a time.

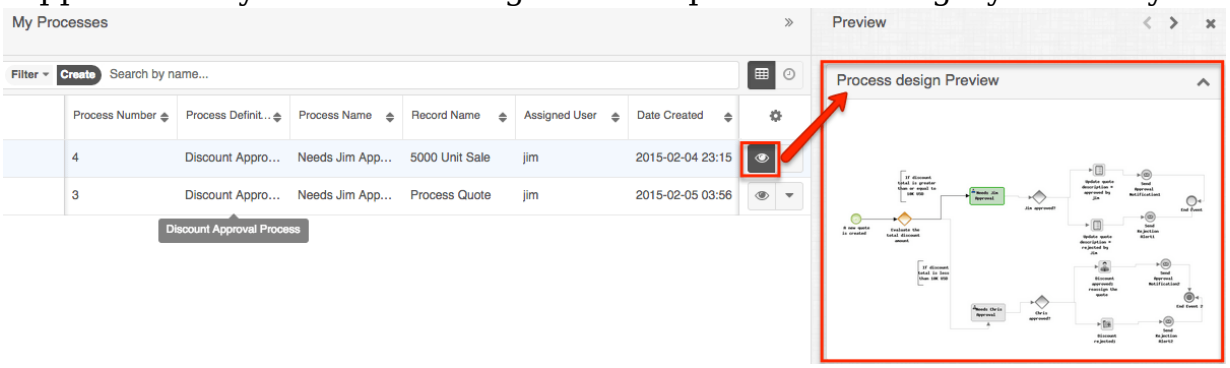
## Column Selection

Sugar gives users the ability to personalize the list view by specifying which fields they want displayed. You can click the Column Selection icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column on your list view.




## Preview

Users can view the progression of a process within the overall flow directly from the Processes list view by clicking the Preview icon to the far right of each process list row. The process' visual design layout will display to the right of the list view providing key information regarding the stages that have already been completed, the current stage of the process, and the stages that have yet to execute. The executed and in-progress stages of the process will be displayed in color while skipped or not-yet-executed stages will be presented in a grayed-out style.



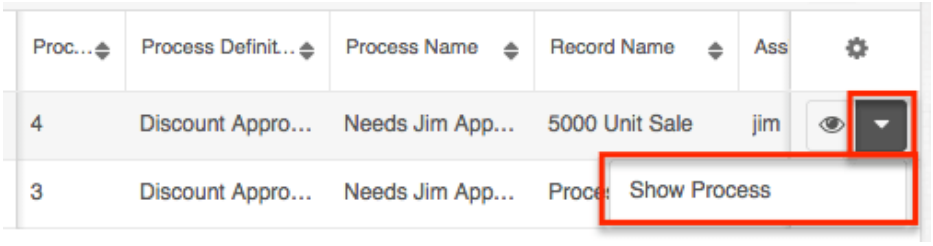

Note: To view the process design layout in more detail, simply click on the Process Design Preview image to open a full-sized version of the flow in a new browser tab.

On the upper right of the intelligence pane, there is a Left and Right arrow button that allows you to scroll through the list view's current search results by

previewing the next or previous record. To close the preview, simply click the "X" on the upper right of the intelligence pane.

### Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to execute a running process directly from the list view by clicking "Show Process". This will direct the user to a landing page where they will be instructed to approve, reject, or resume the current process. For more information about executing processes, please see the Executing Processes section of this documentation.




### More Processes

The list view loads an initial number of records meeting the current search criteria with the option to show additional results at the user's request. By default, Sugar displays 20 records per list view results set. To load the next set of list view results, simply click on the words "More Processes..." at the bottom of the list view. Please note that administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.

### Right Hand Side Drawer

On the upper right of the Processes list view there is a double arrow icon which allows users to expand the list view to the full screen width. The intelligence pane to the right of the list view will be hidden when the list view is expanded. To reduce the list view's width and reveal the intelligence pane, simply click the double arrow icon again.

## Executing Processes

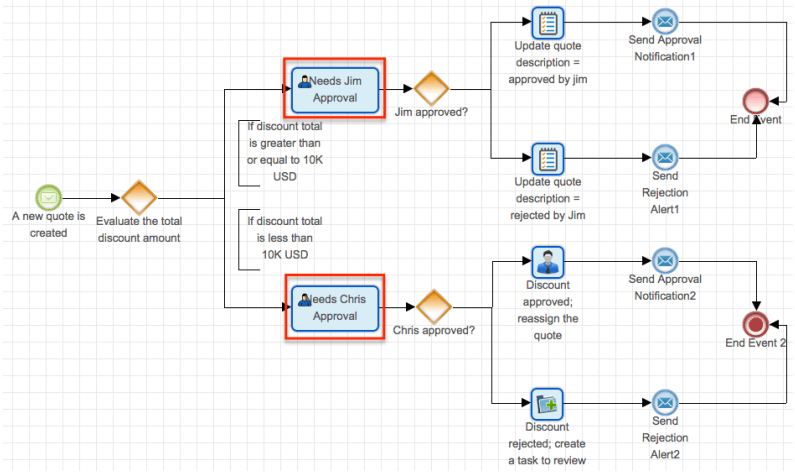
When a running process requires action from a user, that user will see the process in their Processes dashlet and Processes module list view. These moments within a

flow need a user to decide if a circumstance is approved or rejected, or review and/or edit a Sugar record. This decision is formally indicated by executing the process. The following sections explain how to execute the different process activities in Sugar.

## Executing Approval Processes

An approval process is a moment within a flow where a user must decide if a circumstance is approved or rejected. When an approval process requires action from a user, that user will see the process in their Processes dashlet and Processes module list view. The user will formally indicate their approval by executing the process.

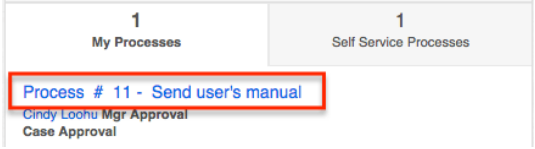
The most common user activity during a process is an approval. For example, an organization may require a different manager's approval depending on the discount total. The following image portrays how a Sugar process will automate this approval:



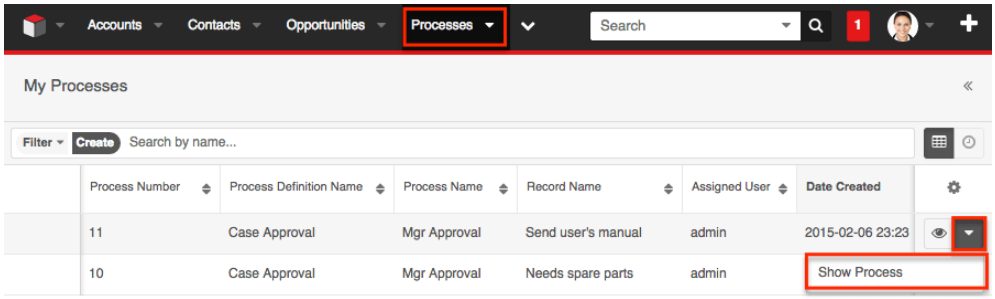

All steps in the above process are automated except for the two approval steps: "Needs Jim Approval" and "Needs Chris Approval". When the automated process reaches either of these steps, Jim or Chris will see a line item in their Processes dashlet and list view.

Follow these steps to execute an approval process:

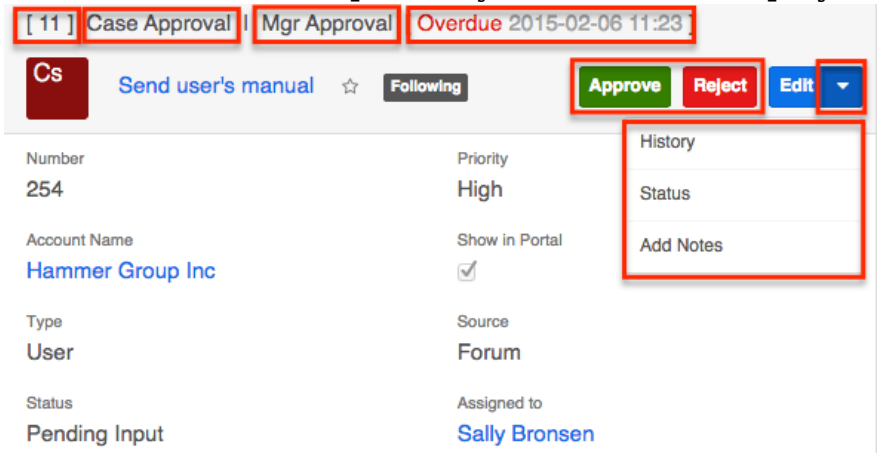
1. Click on the hyperlinked process name in your Processes dashlet. Please note that the dashlet will not differentiate between Approval processes and Routed processes. The process type will become apparent on the next screen.



Alternatively, navigate to Processes list view and choose "Show Process" from the actions menu of the record:




2. The process landing page is the record view of the affected Sugar record. Note: Backwards compatibility modules will display the record's edit view.



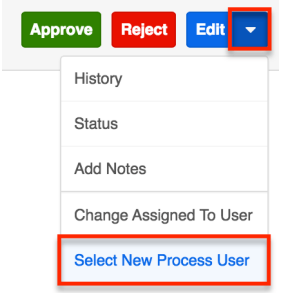

You will also see the following process-specific display items:

- Process Number : Above the Sugar record, the Process Number appears at the beginning of the process description. This is a unique number assigned to the process you are executing. Process numbers are generated in sequential order as new processes are triggered.
- Process Definition name : In the example above, "Case Approval" is the name of the process definition that the administrator created to define the overall flow of this process. For more information about Process Definitions, please see the Process Definitions documentation of the Administration Guide.
- Process Step : Immediately following the Process Definition name, the Process Step's name appears. In the example above, "Mgr Approval" represents the name of the step in the overall process that you are currently executing.
- Due Date : The last element of the process description is the date and time by which you should execute this process step. If the administrator has not specified a due date, then no date will appear. If the due date occurs in the past, then the date will be preceded by the word "Overdue" in red text.
- Approve/Reject buttons : Use one of these two buttons to indicate whether the record's details have been approved or rejected. Clicking on either of these buttons will fully execute the process step and direct you

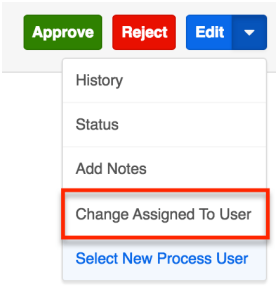
to the previous screen. You will not be able to undo this action and the overall process flow will continue running with the next process step as configured in the overall process definition.

- Actions Menu : Click on the triangle to the right of the Edit button for additional process options:

  - History : Launch a popup window that displays the entire time-stamped history of all transitions, user engagements, and automated occurrences for this process. For more information, please refer to the Viewing Process History section of this documentation.
  - Status : Launch a popup window that displays an image of this process's overall flow. For more information, please refer to the Previewing the Process Design section of this documentation.
  - Add Notes : Launch a popup window where you can add notes for people who will engage with the process later or read notes left by others before you. For more information, please refer to the Viewing Process Notes section of this documentation.
  - Select New Process User : Choose a new user to execute this process. This option must be enabled by the administrator for the process. For more information, please refer to Choosing a New Process User.




  - Change Assigned To User : Choose a new Assigned To user for the Sugar record. This option must be enabled by the administrator for the process. For more information, please refer to Choosing a New Assigned To User.

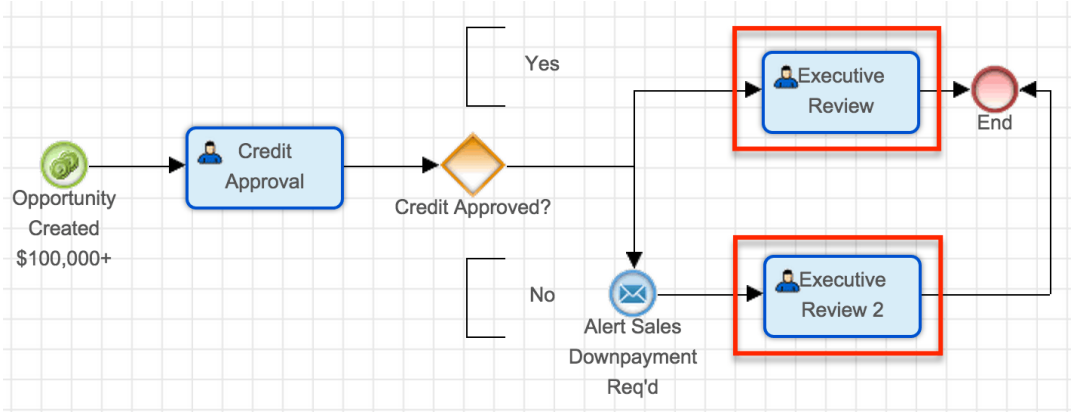



3. Expand the record's actions menu to browse available options. You can review the user notes and history as explained in Viewing Details About a Running Process, or if enabled, choose to delegate this process step to another user using "Change Owner" or "Reassign".
4. Optionally, edit the Sugar record if necessary.

5. After reviewing the Sugar record and process details, click on either "Approve" or "Reject" to execute the process. You will be redirected to your dashboard where the executed process will no longer be visible on your Processes dashlet.

## Executing Routed Processes

The other user activity that a process may require is to simply review and/or edit a Sugar record. For example, a high-value quote record may not require approval, but the executive team should be able to review the quote for capacity planning purposes. In this situation, the process definition can be configured to route the process flow through the members of the executive team without requiring a conditional response. The following image portrays how a Sugar process will automate this procedure:

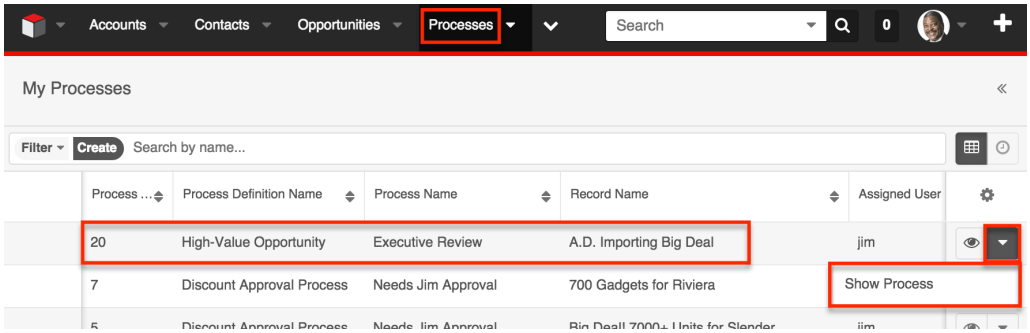



Follow these steps to execute the route step of a process:

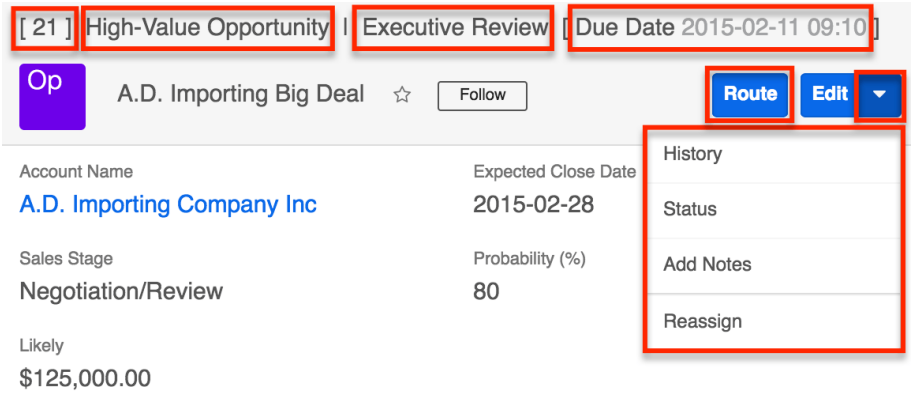
1. Click on the hyperlinked process name in your Processes dashlet. Please note that the dashlet will not differentiate between Approval processes and Routed processes. The process type will become apparent on the next screen.

   Alternatively, navigate to Processes list view and choose "Show Process" from the actions menu of the record:

2. The process landing page is the record view of the affected Sugar record.
   Note: Backwards compatibility modules will display the record's edit view.



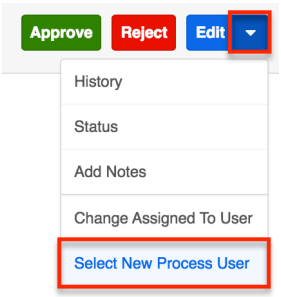

   You will also see the following process-specific display items:

   - Process Number : Above the Sugar record, the Process Number appears at the beginning of the process description. This is a unique number assigned to the process you are executing. Process numbers are generated in sequential order as new processes are triggered. If a process flow contains multiple user activities (approvals or reviews) then the process will retain the same process number until the end of the flow.
   - Process Definition name : In the example above, "High-Value Opportunity" is the name of the process definition that the administrator created to define the overall flow of this process. For more information about process definitions, please see the Process Definitions documentation of the Administration Guide.
   - Process Step : Immediately following the process definition name, the Process Step name appears. In the example above, "Executive Review" represents the name of the single step in the overall process that you are currently executing.
   - Due Date : The last element of the process description is the date and time by which you should execute this process step. If the administrator has not specified a due date, then no date will appear. If the due date occurs in the past, then the date will be preceded by the word "Overdue" in red text.
   - Route button : Click this button to execute the process. For more information, please proceed to the next step.
   - Actions Menu : Click on the triangle to the right of the Edit button for additional process options:

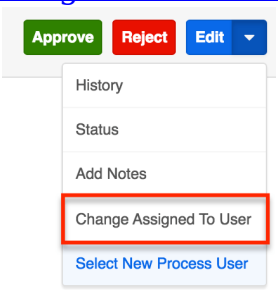
     - History : Launch a popup window that displays the entire time-stamped history of all transitions, user engagements, and automated occurrences for this process. For more information, please refer to the Viewing Process History section of this documentation.
     - Status : Launch a popup window that displays an image of this

process's overall flow. For more information, please refer to the Previewing the Process Design section of this documentation.

- Add Notes : Launch a popup window where you can add notes for people who will engage with the process later or read notes left by others before you. For more information, please refer to the Viewing Process Notes section of this documentation.
- Select New Process User : Choose a new user to execute this process. This option must be enabled by the administrator for the process. For more information, please refer to Choosing a New Process User.




- Change Assigned To User : Choose a new Assigned To user for the Sugar record. This option must be enabled by the administrator for the process. For more information, please refer to Choosing a New Assigned To User.




3. When a flow has been routed to you for review, the only required action is to acknowledge receipt. However, you may first choose to edit the affected record. Review the details of the Sugar record and inspect the process Notes for any critical information that your colleagues may have shared. For information about viewing process Notes, please refer to the Viewing Process Notes section of this documentation. When you have completed making edits and reviewing the record, click "Route" to complete the process.
4. You will be redirected to your dashboard where the executed process will no longer be visible on your Processes dashlet.

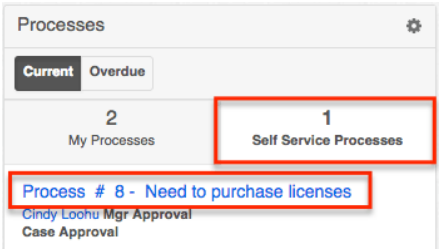
## Executing Self-Service Processes

Some user-facing processes will not have a designated process owner. Instead, users will be empowered to claim responsibility for them. These processes will appear in the Self Service Processes tab of the Processes dashlet. Self-service processes may require either an approval/rejection response or review of a routed

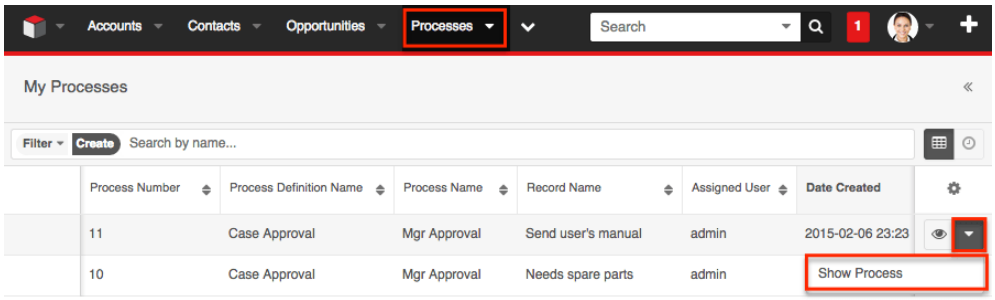
action.

Follow these steps to claim and then execute a self-service process:

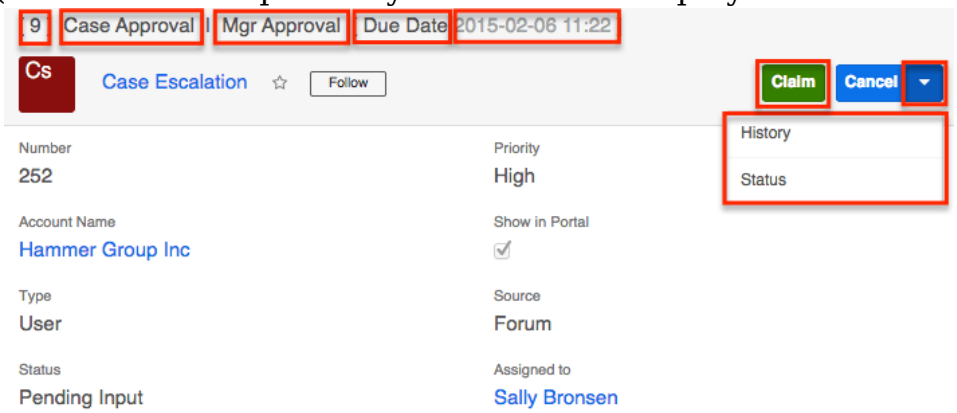
1. Click on the hyperlinked process name in the Self Service Processes tab of your Processes dashlet.




   Alternatively, navigate to Processes list view and choose "Show Process" from the actions menu of the record:




2. The process landing page is the record view of the affected Sugar record (backwards compatibility modules will display the record's edit view).



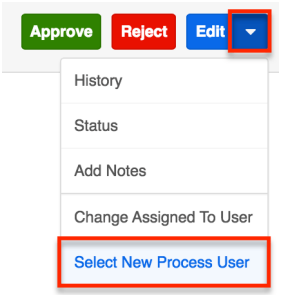

   You will also see the following process-specific display items:

   - Process Number : Above the Sugar record, the Process Number appears at the beginning of the process description. This is a unique number assigned to the process you are executing. Process numbers are generated in sequential order as new processes are triggered.
   - Process Definition name : In the example above, "Case Approval" is the name of the Process Definition that the administrator created to define the overall flow of this process. For more information about Process Definitions, please see the Process Definitions documentation of the

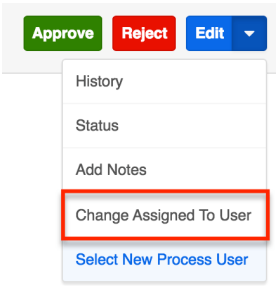
Administration Guide.

- Process Step : Immediately following the Process Definition name, the Process Step's name appears. In the example above, "Mgr Approval" represents the name of the step in the overall process that you are currently claiming.
- Due Date : The last element of the process description is the date and time by which a user should execute this process step. If the administrator has not specified a due date, then no date will appear. If the due date occurs in the past, then the date will be preceded by the word "Overdue" in red text.
- Claim button : Click this button to claim the process. This will remove the process from the Self Service pool. For more information, please proceed to the next step.
- Actions Menu : Click on the triangle to the right of the Edit button for additional process options:

  - History : Launch a popup window that displays the entire time-stamped history of all transitions, user engagements, and automated occurrences for this process. For more information, please refer to the Viewing Process History section of this documentation.
  - Status : Launch a popup window that displays an image of this process's overall flow. For more information, please refer to the Previewing the Process Design section of this documentation.
  - Select New Process User : Choose a new user to execute this process. This option must be enabled by the administrator for the process. For more information, please refer to Choosing a New Process User.



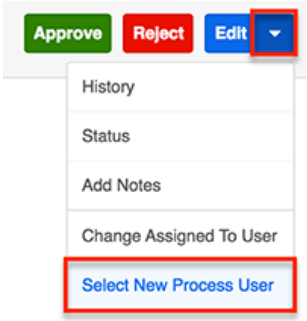

  - Change Assigned To User : Choose a new Assigned To user for the Sugar record. This option must be enabled by the administrator for the process. For more information, please refer to Choosing a New Assigned To User.




3. Click on "Claim" to indicate your intention to execute this process and remove it from view of other team members. The process can be immediately executed after claiming it, or you can navigate away and find the process later in the My Processes tab of your Processes dashlet.
4. After clicking the Claim button, the page will reload and expose the Approve/Reject or Route buttons, depending on what type of process activity has been configured.
5. You can now execute the process as explained in either the Executing Approval Processes or Executing Routed Processes section.

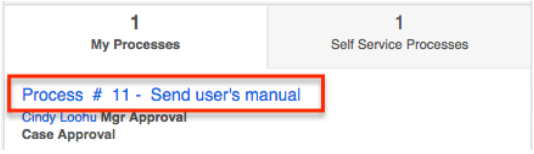
## Choosing a New Process User

When a process is routed to you for review or approval, it may be possible to designate a new user to execute the process. The administrator can enable or disable this option on each process definition, so it may be possible to do this for one process but not another. If the option is enabled, "Select New Process User" will be available in the actions menu on the process execution screen:



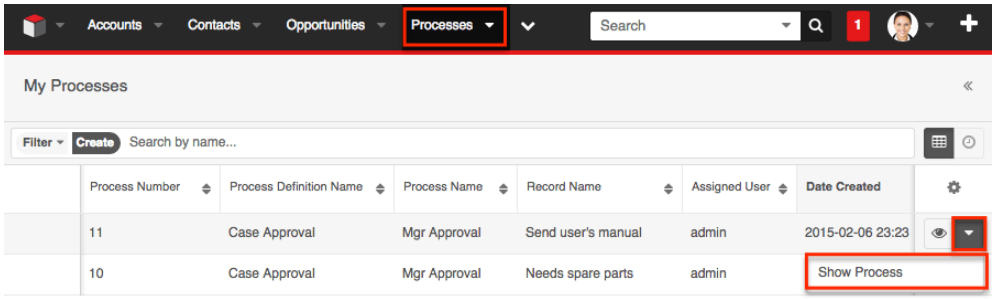

Follow these steps to reassign a process:

1. Click on the hyperlinked process name in your Processes dashlet. Please note that the dashlet will not differentiate between Approval processes and Routed processes. The process type will become apparent on the next screen.

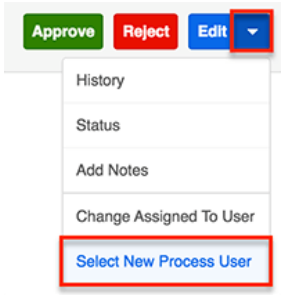



   Alternatively, navigate to Processes list view and choose "Show Process" from

the actions menu of the record:




2. The process landing page is the record view of the affected Sugar record. Note: Backwards compatibility modules will display the record's edit view.
3. Click on the triangle next to the Edit button to reveal the actions menu. Click on "Select New Process User".




Note: If "Select New Process User" is not displayed, then the administrator has not enabled reassignments for this type of process. Please contact the administrator and ask them to reassign the process for you.

4. The "Select New Process User" window will appear.



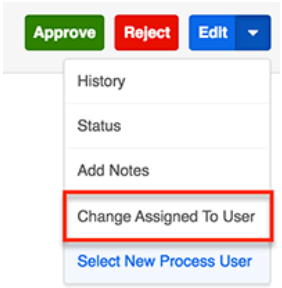

There are three options:

- User : Choose a user to complete this step of the process. The administrator will have specified a Sugar team from which you may choose any member. No other users will be displayed in the User dropdown.
- Type : Choose a reassignment method:
    - Round Trip : Choose "Round Trip" to make the process route back to you when the new user has completed this step.
    - One Way : Choose "One-Way" to direct the process to a new user, and then have it continue to its next step without routing back to you.

- Note : As a best practice, add a note explaining why you are choosing a new user to execute this process. The new user will see your note when she clicks on "View Notes".
- Click on "Save" to be redirected to your dashboard where the reassigned process will no longer be visible on your Processes dashlet.

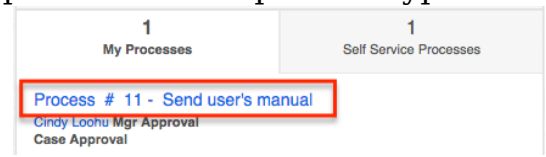
## Choosing a New Assigned To User

When a process is routed to you for review or approval, it may be possible to choose a new assigned user for the affected Sugar record without affecting the flow of the process. The administrator can enable or disable this option on each process definition, so it may be possible to reassign the Sugar record for one process but not another. If the option is enabled, "Change Assigned To User" will be available in the actions menu on the process execution screen:

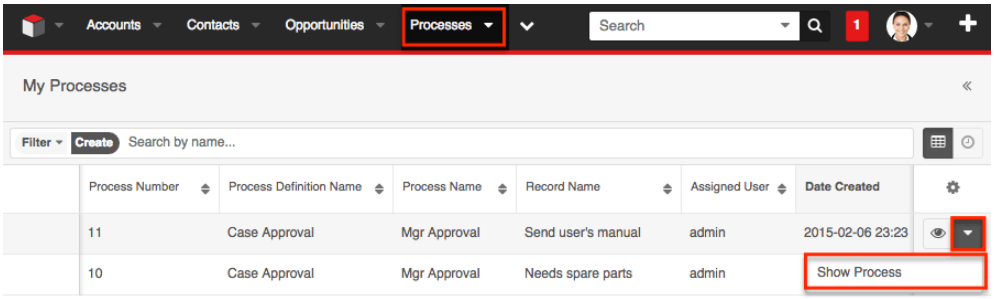



Follow these steps to designate a new assigned user:

1. Click on the hyperlinked process name in your Processes dashlet. Please note that the dashlet will not differentiate between Approval processes and Routed processes. The process type will become apparent on the next screen.

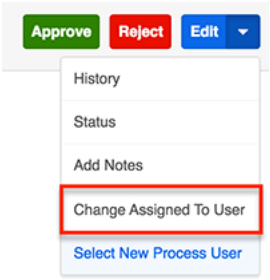
   
   

   Alternatively, navigate to Processes list view and choose "Show Process" from the actions menu of the record:

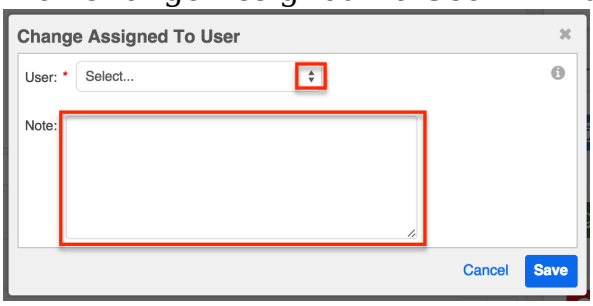
2. The process landing page is the record view of the affected Sugar record. Note: Backwards compatibility modules will display the record's edit view.

3. Click on the triangle next to the Edit button to reveal the actions menu. Click on "Change Assigned To User".




Note: If "Change Owner" is not displayed, then the administrator has not enabled reassignments for this type of process. Please contact the administrator and ask them to reassign it for you.

4. The "Change Assigned To User" window will appear:

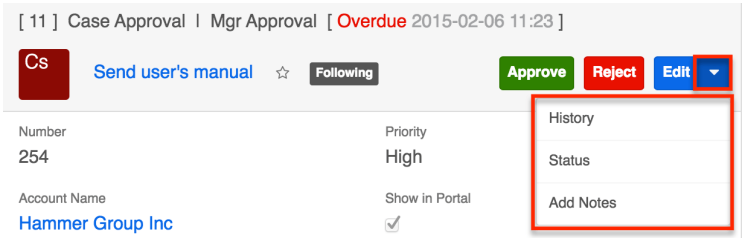



There are two options:

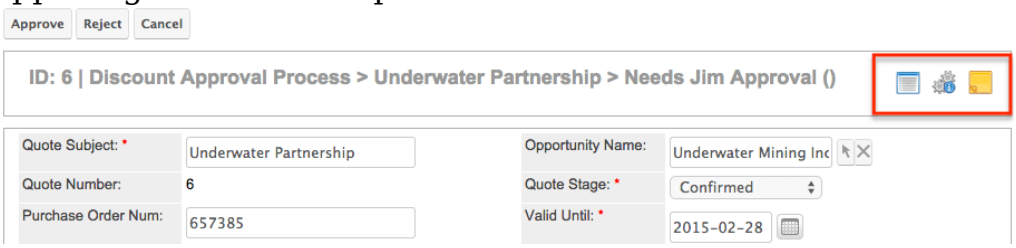
- User : The user chosen here will become the "Assigned To" user of the related Sugar record. The administrator will have specified a Sugar team from which you may choose any member. No other users will be displayed in the User dropdown.
- Note : As a best practice, add a note explaining why you are choosing a new assigned user. The next process user will see your note when she clicks on "View Notes".
- Click on "Save" to update the Sugar record. The page will reload to reflect the change. You can now execute the process as explained in either the Executing Approval Processes or Executing Routed Processes section.

## Viewing Details About a Running Process

When executing a running process, there are three options available that will help you gain valuable insight into the past, present, and future state of the process: Show History, Show Notes, Show Status. These options are accessible via the actions menu on the process execution screen. Click on the triangle to the right of the edit button to expand the actions menu:




In backwards-compatibility modules, these options are represented by icons in the upper right area of the process execution screen:



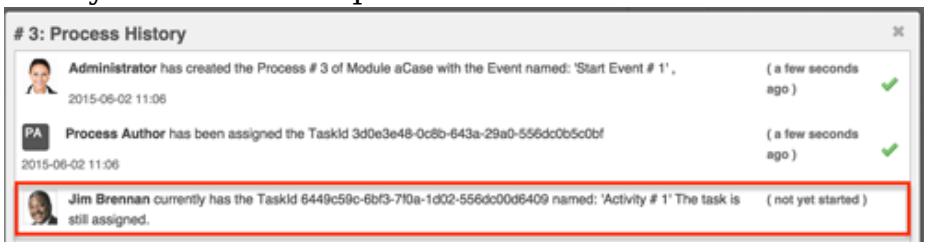

| Action | BWC Icon | Description |
|---|---|---|
| Show History | | View the entire time-stamped history of all process transitions, user engagements, and automated occurrences that were executed by the Process Author engine. |
| Show Notes | | Read messages from users who have already engaged in the process, and send messages to users who will engage in the process later. |
| Show Status | | Reveal an image of the process' visual design layout in a pop-up window. The image will reveal key information regarding the stages that have already been completed, the current stage of the process, and the stages that have yet to execute. |

## Viewing Process History

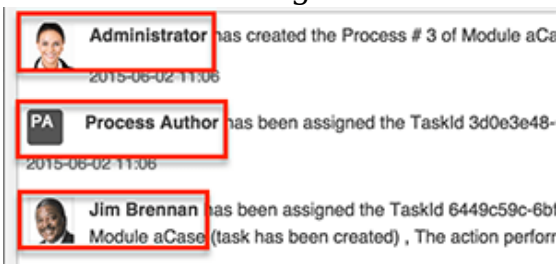
To review the entire time-stamped history of all transitions, user engagements, and

automated occurrences for a particular process, follow these steps:

1. From the Processes dashlet, click on the hyperlinked process name to view the process execution screen.
2. Click on the triangle next to the Edit button to reveal the Actions menu, and then click "Show History".
   Note: In backwards compatibility modules, click on the History icon in the corner of the screen.
3. A popup window will appear over the current page outlining the transition history of the current process.




   - Profile image and name of the process user who executed the transition. The process trigger will be credited to the administrative user who designed the process, while automated events will be executed by the Process Author engine.




   - Explanation of the transition that occurred:




   - Transition status indicator:




     - Checkmark : The action has been executed.
     - No Checkmark : The action has not yet been executed.
4. Click on the X in the corner of the window to return to the process execution screen.

## Viewing Process Notes

A process user who is engaged in a process activity can add notes for people who will engage with the process later in its flow. When a different user engages in that same process later, he can see the earlier user notes and choose to add his own. Users who executed process activities at the beginning will not see the notes added by subsequent process users unless the process is routed back to them for review or approval later.

Note: Admin users can see all notes and add notes to any running process at any time from the Process Management page.

To create a note and view process notes from other users, follow these steps:

1. From the Processes dashlet, click on the hyperlinked process name to view the process execution screen.
2. Click on the triangle next to the Edit button to reveal the Actions menu, and then click "Show Notes".
   Note: In backwards compatibility modules, click on the Notes icon in the corner of the screen.
3. A popup window will appear over the current page that displays time-stamped notes from earlier users of the current process.
4. At the top of the window, there is also a composition area where you can add your own notes. Simply type a message in the empty field and then click on "Add Note" to add it to the Notes window.




5. Click on the X in the corner of the window to return to the process execution screen.

Every person that may be involved in a process will not see the process throughout its entire flow. Regular users can only see the process in list view when they have a record to approve, reject, or review. Therefore, only one regular user (non-admin) can see the notes at any given time. In other words, the notes will only be seen by users who approve/reject/review the process AFTER the note is added.

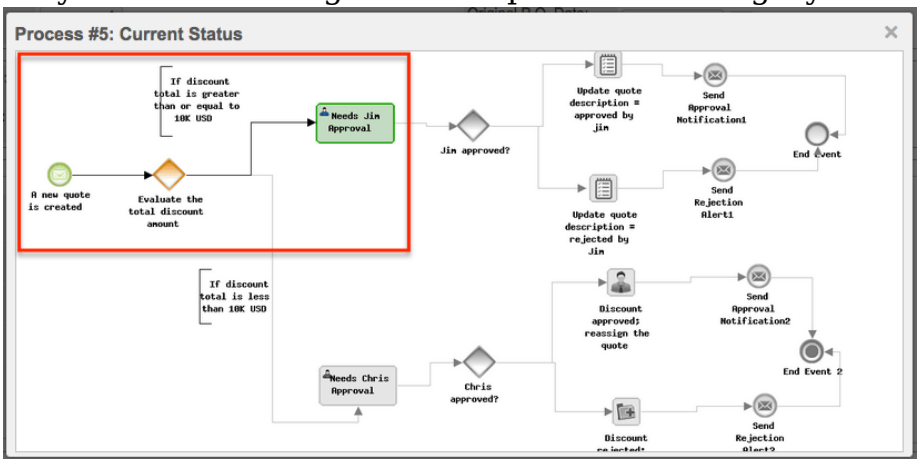
## Previewing the Process Design

Users can view the progression of a process within the overall flow directly from

the process' execution page. Click on the triangle next to the Edit button to reveal the Actions menu, and then click "Show Process".

Note: In backwards compatibility modules, click the Status icon in the upper right corner.

The process' visual design layout will open in a pop-up window, providing key information regarding the stages that have already been completed, the current stage of the process, and the stages that have yet to execute. The executed and in-progress stages of the process will be displayed in color, while bypassed or not-yet-executed stages will be presented in a grayed out style.




## Terminated vs. Cancelled Processes

The Process Author automatically terminates a process when the record related to the process' Start event is deleted. The associated process will be removed from the Processes dashlet and the process record will display "Terminated" in the Status column of the administrator's Process Management list view.

Cancelled processes, on the other hand, have been intentionally stopped by the administrator. The associated process will be removed from the Processes dashlet and the process record will display "Cancelled" in the Status column of the administrator's Process Management list view.

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# Export

## Overview

There may be times in which users will want to access, review, or manipulate information from their Sugar database in another format outside of Sugar. To facilitate this process, users have two options on ways to export their data from Sugar. Upon exporting data from Sugar, a CSV ("Comma Separated Value") format file will be downloaded to the users computer. This file can be reviewed in Microsoft Excel, Notepad, or other spreadsheet tools and text editors.

Exporting restrictions can be controlled by a System Administrator via Admin > Locale. For more information on the Locale menu, please refer to the Locale section of the Administration guide. An administrator also has the option to create a Role hindering regular users' access to the export functionality. Please refer to the Role Management section of the Administration guide for more information on setting roles for users.

## Exporting From Module List Views

The first type of export that will be covered is exporting from the module list view. When exporting this way, the downloaded file contains every field from the database within the given module for the specified record or records. This export will not include any information from records which are associated via relationships to this module. Please note that the export method varies slightly between modules using the Sidecar user interface (e.g. Accounts, Contacts, Leads, etc.) and Legacy user interface (e.g. Calls, Meetings, Quotes, etc.).

This export method is most useful when performing a type of data migration, needing an excess of detail, or performing a comprehensive import and update of the data, since this method exports all fields within a module. It is recommended the Export From Reports functionality be used for any other export use case to isolate the specific information needed.

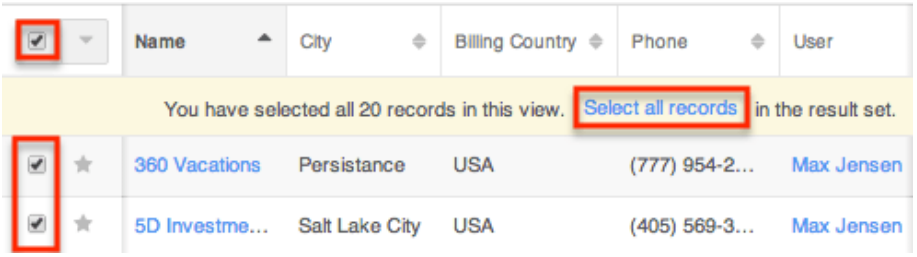
Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

### Exporting From Sidecar Module List Views

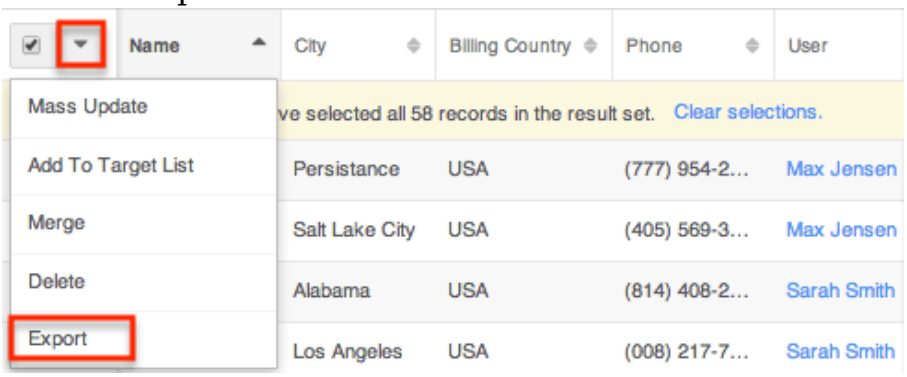
The following steps cover exporting from the Accounts module as an example:

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the Module Search to find the Account records you wish to export.
3. Select the desired account records individually by marking the checkbox on

the left of each row.
    - Note: You can also use the Select All feature in the list view to select the first 1000 records in the result set. If you wish to export more than 1000 records or export a specific group of records on the list view, please use the filter option in module search to perform the exports in smaller batches.




4. Choose "Export" from the Actions menu.

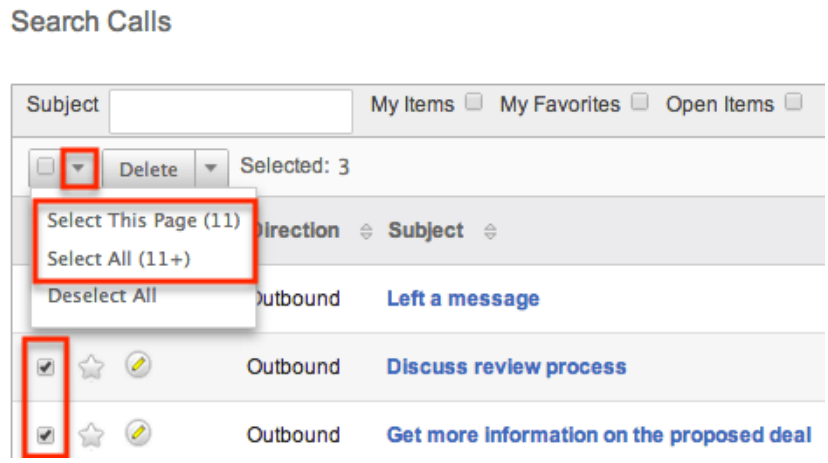



The CSV file will be downloaded to your local machine to a location defined by your browser settings. The file can be read and manipulated as necessary.

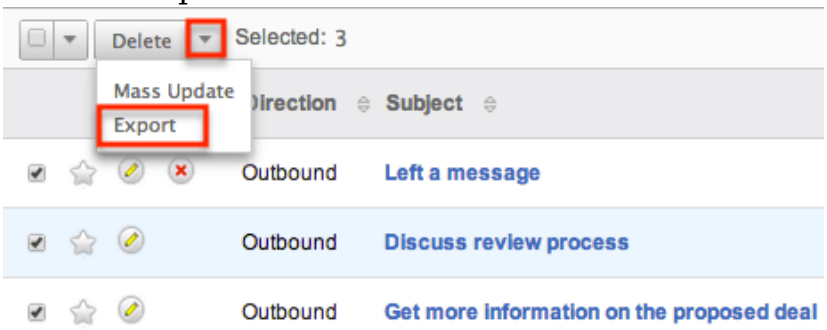
## Exporting From Legacy Module List Views

The following steps cover exporting from the Calls module as an example:

1. Navigate to the Calls list view by clicking the Calls module tab.
2. Use the Basic or Advanced Search functionality to find the records you wish to export.
3. Select the desired call records individually or by using the checkbox dropdown's options.




4. Choose "Export" from the Actions menu.




The CSV file will be downloaded to your local machine to a location defined by your browser settings. The file can be read and manipulated as necessary.

## Exported Files From List View

When data is exported from Sugar, the file that is produced is a CSV, or "Comma Separated Value" file. When viewed in a plain text editor, a CSV file looks like a long string of text with groupings of text separated with quotation marks and commas (e.g. "First Name","Last Name","Title"). The file first lists out all columns that are in the file, and then the corresponding rows follow, also separated by quotation marks and commas (e.g. "Dusty","Connor","IT Developer").

However, most spreadsheet software, such as Microsoft Excel, will read this file and convert the quotation marks and commas into rows and columns. This makes your data much easier to read and turns it into a useful format that can be manipulated and re-purposed as need be.



| | A | B | C |
|---|---|---|---|
| 1 | First Name | Last Name | Title |
| 2 | Dusty | Connor | IT Developer |

The records that appear in your spreadsheet are dependent on what type of search, if any, you did prior to your export.

When exporting from list view, the user is left with every part of the module database information, which is often not all readable by the user. This file will only contain information specific to the module where the export was performed. This exported data will comprise of all stock and custom fields from the module. No data that would normally be found in a subpanel will appear on this export.

## Exporting From Reports

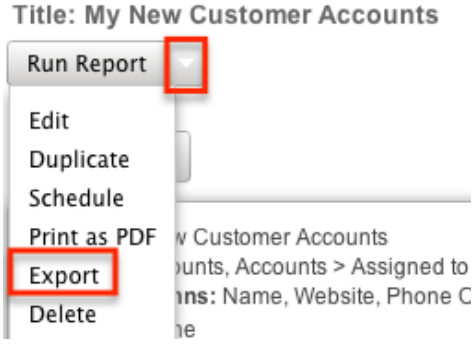
In addition to exporting from a list view, users also have the option to export data from a report. Using a Rows and Columns report, users can select the specific fields they would like to see on the export file and filter the module data however they would like. The advantage to using reports is that users will only be presented with the data that they need, and no excess data. In addition, users can also export data from related modules using reports, which is not possible when Exporting From Module List Views. Finally, because the reports are much more focused and specific, there is a higher threshold of the quantity of records that can be exported before encountering a timeout or any other such issues.

Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a report with a large amount of data. If you encounter an error when performing this action, we recommend breaking up the report in smaller batches.

For more information on creating your report, please refer to the Reports documentation.

Use the following steps to complete an export from a report:

1. Select an existing Rows and Columns report from the Report module's listview, or create a new one based on the information that you would like to export.
2. Click on the actions menu of the report details and select "Export".




3. The CSV file will be downloaded to your computer to a location defined by your browser settings. The file can then be read and manipulated at will.

When exporting from a report, the data is more well-rounded for a user to review. The user is allowed to determine what fields should be included on the export. This means that while reviewing it in a spreadsheet, the information appears exactly as it does in Sugar. This makes for a more positive user experience and a more focused export file. In addition, the user is able to utilize related modules to the reported on module. This makes the report more useful in a business sense for individual users.

### Exported Files From Reports

When data is exported from Sugar, the file that is produced is a CSV, or "Comma Separated Value" file. When viewed in a plain text editor, a CSV file looks like a long string of text with groupings of text separated with quotation marks and commas (e.g. "First Name","Last Name","Title"). The file first lists out all columns that are in the file, and then the corresponding rows follow, also separated by quotation marks and commas (e.g. "Dusty","Connor","IT Developer").

However, most spreadsheet software, such as Microsoft Excel, will read this file and convert the quotation marks and commas into rows and columns. This makes your data much easier to read and turns it into a useful format that can be manipulated and repurposed as need be.

| | A | B | C |
|---|---|---|---|
| 1 | First Name | Last Name | Title |
| 2 | Dusty | Connor | IT Developer |

The information that appears in your spreadsheet is dependent on what filters you added to your report and what display columns that you had showing. Only the information that shows in the display columns when you view your final report is what will be included in your CSV export.

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# Import

## Overview

For most modules, Sugar allows users to transfer data from an external source (usually a comma-separated-values file) into the database via import. Sugar's import wizard is a quick and easy way to create and/or update many records at once. The import tool can be used to add a list of new customers or leads to the database, update existing data, migrate from a previous CRM system, or for any process that requires manipulating a large amount of records at once.

Your system's Sugar administrator may enable importing for the following modules:

- Accounts
- Bugs
- Calls
- Cases
- Contacts
- Contracts
- Custom modules (if applicable)
- Leads
- Meetings
- Notes
- Opportunities
- Revenue Line Items
- Targets
- Tasks

Users with an administrator or developer role can import records into the following admin-only modules:

- Process Author modules:
  - Process Definitions
  - Process Business Rules
  - Process Email Templates
- Products modules:
  - Manufacturers
  - Products
  - Product Catalog
  - Product Category
  - Product Types
  - Tax Rates
- Users

When importing through any of the above modules, Sugar presents users with a wizard to help guide users through the process of creating and updating records.

## Import Guidelines

Importing is a very important process for both new Sugar users and those who

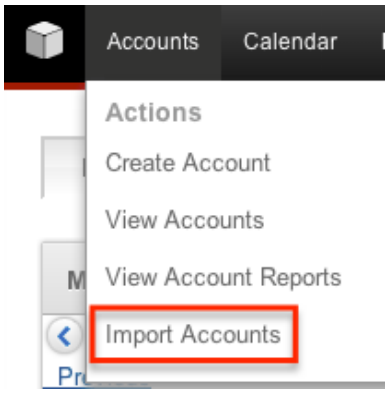
have been using Sugar for years. Depending on your business needs, you may run imports anywhere from multiple times per week to only once or twice per year. Regardless of the import frequency, all users follow the same import guidelines:

- File Delimitation : Sugar accepts files that are delimited by a given separator, such as commas or tabs. The most common type of import will be using a CSV (Comma Separate Value) file, but Sugar will accept other file types as long as it recognizes the delimiter.
- Imposed Limitations : Sugar, by default, does not impose any type of import imitations. However, System Administrators can impose a limit on the amount of rows or records that can be imported at one time. This limitation is found in Admin > System Settings > Advanced > Import - Maximum Number of Rows. Administrators can also limit what modules users are allowed to import into through the use of Roles.
- Scrub Data Before Import : It is strongly recommended that all data is reviewed and scrubbed before importing. It is much easier to see if you are importing good data or that you have removed all duplicates before importing than finding them after they are already in Sugar and are already in use by other users. In addition, you want to ensure standardized fields such as dates, phone numbers, etc. adhere to a common format so that the import will run as smooth as possible.
- Parent Records First : When importing any records that use a relationship to another module, such as the Account - Contact relationship, it is best to try importing the parent, or higher level, records first. This is demonstrated with a one-to-many relationship between the two modules. In this case, it is best to import accounts first and then contacts, which rely on account records.

## Importing New Records

The first type of import that will be covered is importing new records. Whether you are just starting a migration from another CRM to Sugar or if you are adding a new list of records that you have received, such as a new list of leads or accounts, this process will help to get the data into Sugar without having to manually enter each record. After preparing your import file, follow these steps to import the list into Sugar:

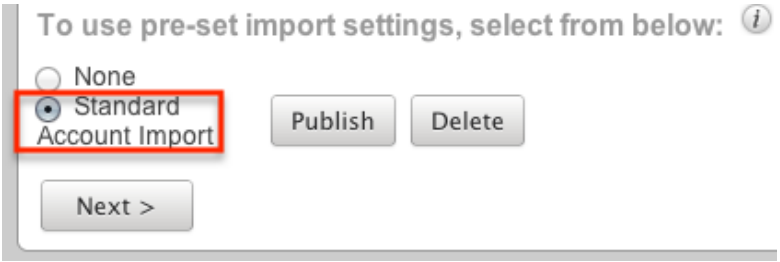
1. Navigate to the module tab for the module that you are importing into and select the import option. This will open the Import Wizard and bring you to the"Upload Import File" screen.



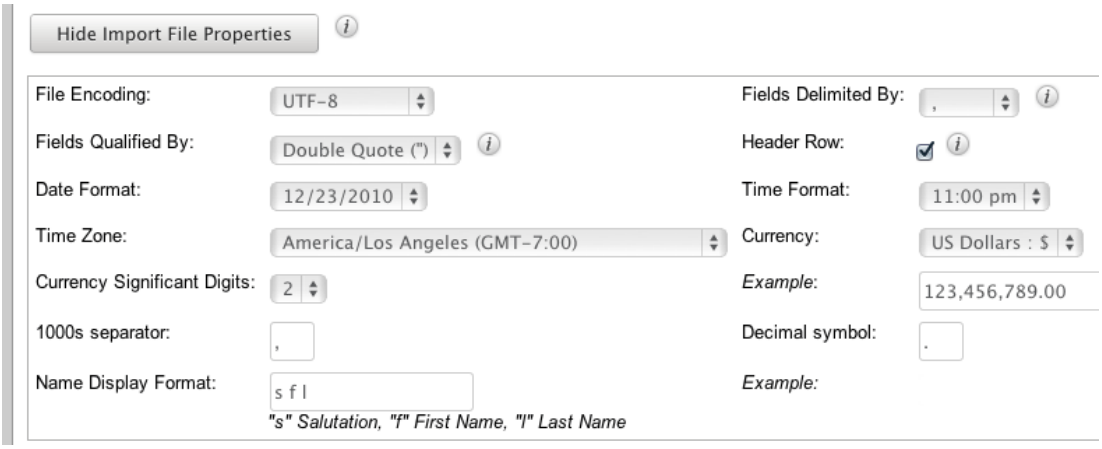

2. If you would like to review the Import File Template, you can download it from this page. This will give you a template of the format Sugar is going to be using to import your data. For more information on the template, please review the Import File Template section of this documentation.
3. Select the import file that you are going to use to import by clicking the Choose File button. When prompted, select the file from your computer and it will appear in this box.



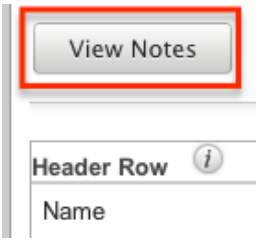

4. Ensure that "Create new records only" is selected.
5. If you have preformed imports before and have previously saved your import settings, you can select your setting at the bottom of the page using the "To use pre-set import settings, select from below" option. If you do not have any saved import settings, this section will not appear. For more information on saving mapping, please review the Saving Field Mappings section of this documentation.




6. Click "Next" to access the "Confirm Import File Properties" screen.
7. This screen will show you the first two rows that Sugar is going to try to import as an example to let you know that your file was read properly by Sugar.
8. The Import Wizard automatically detects the properties of the file that has been uploaded to ensure the best import possible. If you notice any mistakes or need to set up any advanced configuration, click "View Import File Properties". These changes are specific to the import and do not affect your standard user preferences.




9. If the file was exported from either Salesforce.com or Microsoft Outlook, select the corresponding option under "If the import file data was exported from any of the following sources, select which one". If not, leave this as "None". This option will set up your mapping properly on the next screen.
10. Click "Next" to access the Confirm Field Mappings screen.
11. Click the View Notes button for any relevant information, specific to this module, to the import that you are performing.



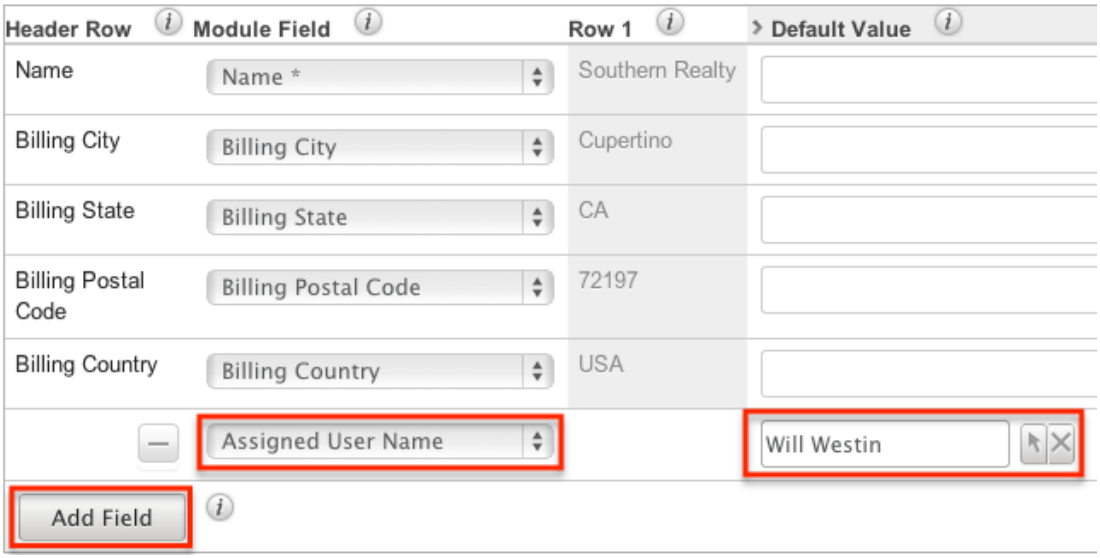

12. This screen presents you with four columns:



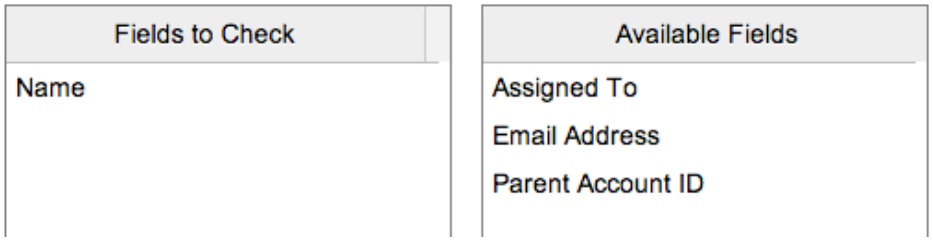

Header Row : This is the column header from your import file. This column will let you reference your file to make sure your column mapping is correct. If your import file does not have a header row, this column will not show.
Module Field : This column contains a dropdown list of all importable fields for the module. The Import Wizard tries to match the Header Row with the corresponding Sugar field. If the suggested mapping is incorrect, use the dropdown list to change the mapping. Required fields are marked with an asterisk (*).
Row 1 : This column contains the values from the first row of data in your import file. This is another aid to help ensure you have your mapping correct, so that you can see the mapping using real data and not just the headers. If your import file does not have column headers, there will be an additional column for Row 2.
Default Value : This column is hidden by default, but can be expanded if needed. When expanded, you have the option to fill in a value that will populate all records where a value for that field does not exist. For example, if you do not have anything populated in the Accounts Industry field, but you

know this is a list of Technology companies, you can populate all blank values in the Industry field with the value of "Technology".

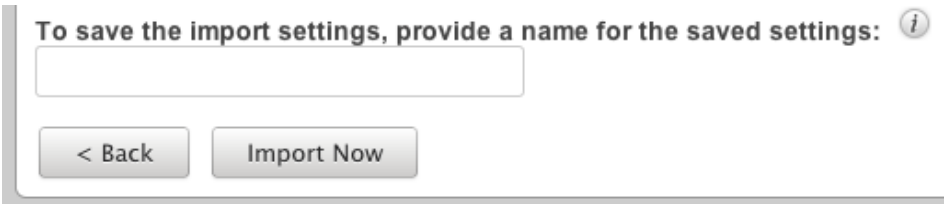
13. Click "Add Field" if any data needs to be added to the import that is not on your import file. This can be used if you would like to assign a value to a record when the column is not on your import file. This is used in conjunction with the Default Value column. For example, if you are importing these accounts, but would like to assign them all to another user, John Smith, you would click the Add Field button, select the field from the Module Field column, and populate the desired value in the Default Value column. Now, all records will be assigned to John Smith upon import.



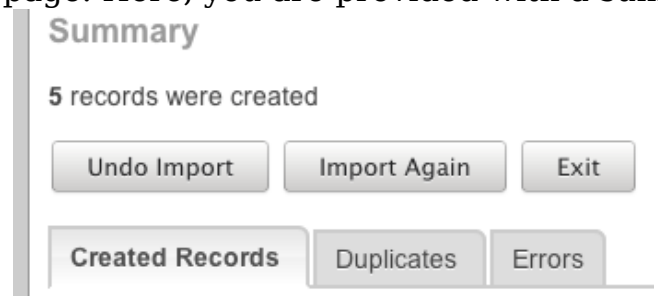

14. Click "Next" to access the Check for Possible Duplicates screen.
15. This menu allows users to check if there are duplicated values on the import to records that already exist in Sugar. This menu will vary depending on what module you are importing into as the fields will be specific to this module. The fields available to the Import Wizard are determined based off the system-defined indexes. This is why you will not see all fields shown on this list, but only a subset of fields from the module. If you would like to cross reference existing Sugar records against what is being imported, simply drag and drop the field name from the right column, "Available Fields", to the left column, "Fields to Check". For more information on duplicate checking, please review the Detecting Duplicates section of this documentation.




16. If the import configuration that you have set up is going to be used again in the future for additional imports, add a name at the button of the page so that it can be referenced later. For more information on saved field mappings, please review the Saving Field Mappings section of this documentation.



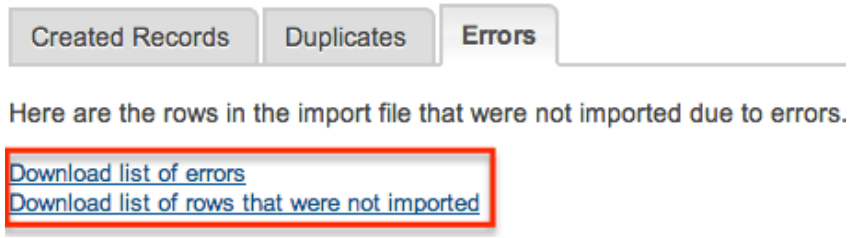

17. When your duplicate checking settings are complete, click "Import Now" to begin the import.
18. After the import completes, you are brought to the "View Import Results" page. Here, you are provided with a summary of the import.




19. The summary will tell you how many records were created, how many were not created due to an error, and how many were found as duplicates.
20. There are three buttons below the Summary:
    Undo Import : If there was a mistake in the import that you realized after importing, you can check this button. All records that were created via the import will be deleted. This button cannot be re-accessed for this import. As soon as you navigate away from this page, the import is considered complete.
    Import Again : Click this button if you would like to go back to the first step of the Import Wizard and perform additional imports. Clicking this button will consider the import to be complete.
    Exit : This button will also consider the import to be complete, but will bring you back to the module's list view to be able to further review or search your records.
21. There are also three tabs on the summary page under the action buttons:
    Created Records : This tab will show you a list view of all of the records that were properly imported on this import.
    Duplicates : This tab will present you with any records that were not imported due to the Import Wizard finding duplicates from Step 15. There is an option to download a list of the duplicates, which produces a new CSV file. You have the option to download this list, make any changes, and import again following this same process.




    Errors : This tab will show you any records that were not imported due to an error during the import process. This is usually seen when there is a problem with data that is on one of the records or rows in the CSV file. For instance, if you are missing a value for a required field, or a field is formatted incorrectly.



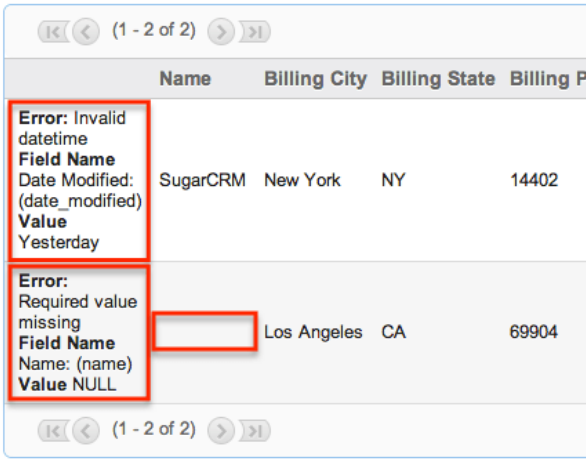

Similar to the option to download duplicate records, you also have the option to download the list of errors using the two links provided.

The "Download list of errors" option will produce a new CSV file with columns showing (from left to right) the error, the field affected, the value, and the line on your original import file where the error occurred.

| | A | B | C | D |
|---|---|---|---|---|
| 1 | Invalid datetime | Date Modified: (date_modified) | Yesterday | 2 |
| 2 | Required value missing | Name: (name) | NULL | 3 |

The "Download list of rows that were not imported" option will download a new CSV file with the same format of your original one, containing only the rows that were not imported so that you can clean them up and then re-import.

| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | Name | Billing City | Billing State | Billing Postal | Billing Count | Date_modified |
| 2 | SugarCRM | New York | NY | 14402 | USA | Yesterday |
| 3 | | Los Angeles | CA | 69904 | USA | |




22. Once you have downloaded the desired lists and reviewed the import, the buttons mentioned in Step 20 can be used to complete your import.

## Importing Updates to Existing Records

In addition to importing new records, Sugar's Import Wizard also has the functionality to use an import file to update existing Sugar records. The process runs very similar to the new record import process described above.

The most important aspect to importing updates to existing records is that Sugar will only update records where there is a matching ID in the import file. Every Sugar record, regardless of what module it is in, is defined with an alphanumeric

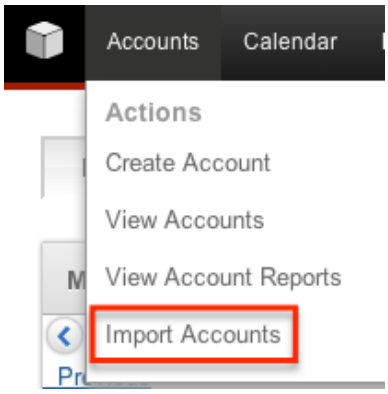
ID field. This field is typically a 36-character alphanumeric value but may be less if imported from a previous CRM. This field is the only way that the Import Wizard will know which record to update. The ID field is not usually shown on Sugar records via the user interface and must be found by running a report or performing an export. During an update-type import, any records in the import file with an empty or incomplete ID column will create a new record, which may create duplicates in your database.

For even more information about performing updates via import, please refer to the Knowledge Base articles, Updating Records via Import and Importing With Record IDs Using Excel's VLOOKUP.

Note: All non-ID fields (name, email address, etc.) are not considered unique and can have duplicates, so only the ID field will work to differentiate records for an update from import.

To mass update Sugar records via import, follow the steps below.

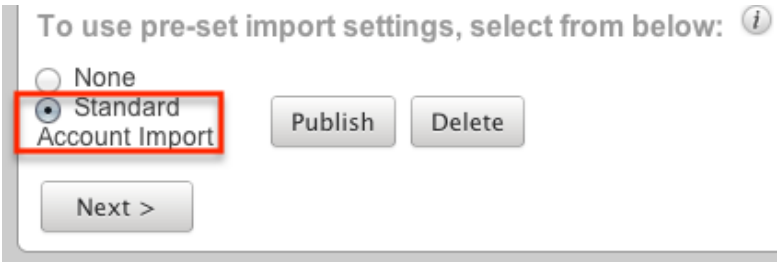
1. You will have to get the ID numbers for all of the records that you are going to be updating to prepare your import file. The most common methods are either by exporting a list of records from the module list view, or by running a report and exporting the results. For more information on exporting, please review the Export documentation.
   Export from List View : This option will include the record ID field, but it is recommended that you open the file in a spreadsheet editor (Microsoft Excel) and delete any columns that you are not updating. Be sure to leave the ID field and any required fields, such as Name, as the import will not complete without these.
   Export from Report : If you choose to run a report, be sure to include the ID field in your display columns so that the records can be matched up. You will also want to include any required fields, such as Name, as the import will not complete without these. Please note that only Rows and Columns reports can be used for exports.
   After you have your file ready for import, you can proceed with working through the Import Wizard.
2. Navigate to the module tab for the module that you are updating and select the import option. This will open the Import Wizard and bring you to the " Upload Import File" screen.




3. If you would like to review the Import File Template, you can download it from this page. This will give you a template of the format Sugar is going to be using to import your data. For more information on the template, please review the Import File Template section of this documentation.
4. Select the import file that you are going to use to import by clicking the "Choose File" button. When prompted, select the file from your computer and it will appear in this box.



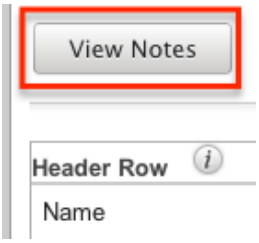

5. Select the option "Create new records and update existing records".
6. If you have performed imports before and have previously saved your import settings, you can select your setting at the bottom of the page using the "To use pre-set import settings, select from below" option. If you do not have any saved import settings, this section will not appear. If your CSV file was exported from Sugar, this is likely not a necessary step. For more information on saving mapping, please review the Saving Field Mappings section of this documentation.




7. Click "Next" to access the "Confirm Import File Properties" screen. Before the "Confirm Import File Properties" screen opens, you will be prompted with an alert informing you that updates made to existing records cannot be undone. Read, and then click "OK" to proceed.
8. This screen will show you the first two rows that Sugar is going to try to import as an example to let you know that your file was read properly by Sugar.
9. The Import Wizard automatically detects the properties of the file that has been uploaded to ensure the best import possible. If you notice any mistakes or need to set up any advanced configuration, click "View Import File Properties". These changes are specific to the import and do not affect your standard user preferences.




10. If the file was exported from either Salesforce.com or Microsoft Outlook, select the corresponding option under "If the import file data was exported from any of the following sources, select which one". If not, leave this as "None". This option will set up your mapping properly on the next screen. If this file was exported from Sugar, keep it set to "None".
11. Click "Next" to access theConfirm Field Mappings screen.
12. Click the View Notes button for any relevant information, specific to this module, to the import that you are performing.



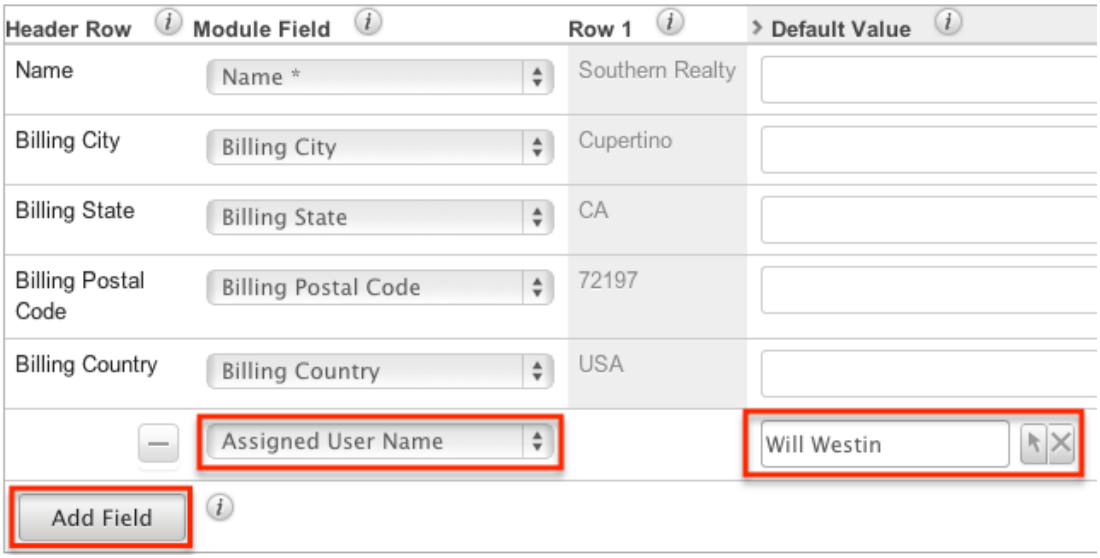

13. This screen presents you with four columns:



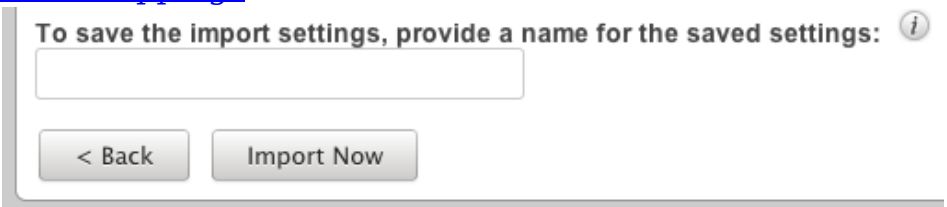

Header Row : This is the column header from your import file. This column will let you reference your file to make sure your column mapping is correct. If your import file does not have a header row, this column will not show.
Module Field : This column contains a dropdown list for each row that contains the name of a field in Sugar. The Import Wizard tries to match the Header Row with the corresponding Sugar field. If the suggested mapping is incorrect, use the dropdown list to change the mapping. Required fields are marked with an asterisk (*).
Row 1 : This column contains the values from the first row of data in your import file. This is another aid to help ensure you have your mapping correct, so that you can see the mapping using real data and not just the headers. If your import file does not have column headers, there will be an additional column for Row 2.
Default Value : This column is hidden by default, but can be expanded if needed. When expanded, you have the option to fill in a value that will populate all records where a value for that field does not exist. For example, if

you do not have anything populated in the Accounts Industry field, but you know this is a list of Technology companies, you can populate all blank values in the Industry field with the value of "Technology".

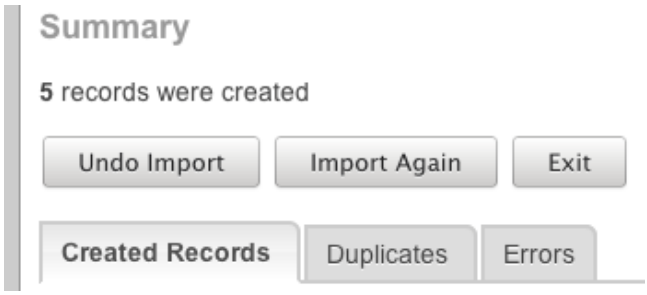
14. Click "Add Field" if any data needs to be added to the import that is not on your import file. This can be used if you would like to assign a value to a record when the column is not on your import file. This is used in conjunction with the Default Value column. For example, if you are importing these accounts, but would like to assign them all to another user, John Smith, you would click Add Field button, select the field from the Module Field column, and populate the desired value in the Default Value column. Now, all records will be assigned to John Smith upon import.




15. Click "Next" to access the Check for Possible Duplicates screen.
16. This menu allows users to check if there are duplicated values on the import to records that already exist in Sugar. Duplicate checking will only apply to new records created by the import. For more information on detecting duplicates, please review the Detecting Duplicates section of this documentation.
17. If the import configuration that you have set up is going to be used again in the future, add a name at the button of the page so that it can be referenced later. For more information on saving mapping, please review the Saving Field Mappings section of this documentation.



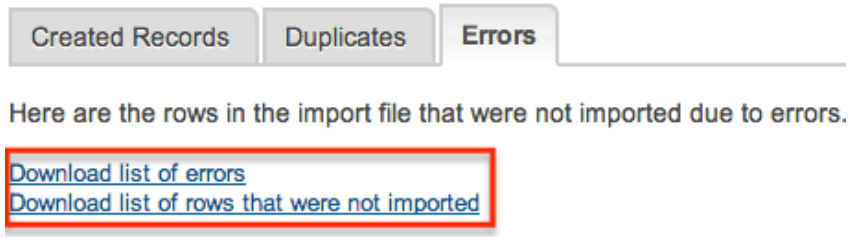

18. Click "Import Now" to begin the import.
19. After the import completes, you are brought to the "View Import Results" page. Here, you are provided with a summary of the import.




20. The summary will tell you how many records were updated, how many were created, how many were not created due to an error, and how many were found as duplicates, as applicable.
21. There are three buttons below the Summary:
    Undo Import : If there was a mistake in the import of any new records that you realized after importing, you can check this button. All new records that were created via the import will be deleted. After updating, no changes to updated records can be reverted. This button cannot be re-accessed for this import. As soon as you navigate away from this page, the import is considered complete. This button will not show if there were no new records created.
    Import Again : Click this button if you would like to go back to the first step of the Import Wizard and perform additional imports. Clicking this button will consider the import to be complete.
    Exit : This button will also consider the import to be complete, but will bring you back to the module's list view to be able to further review or search your records.
22. There are also three tabs on the summary page under the action buttons:
    Created Records : This tab will show you a list view of all of the records that were properly imported on this import. If this was only an update, there will not be any records showing on this tab as it does not show updated records.
    Duplicates : This tab will present you with any records that were not imported due to the Import Wizard finding duplicates from Step 16. There is an option to download a list of the duplicates, which produces a new CSV file. You have the option to download this list, make any changes, and import again following this same process. If you did not use any duplicate settings, this tab will be empty.




    Errors : This tab will show you any records that were not imported due to an error during the import process. This is usually seen when there is a problem with data that is on one of the records or rows in the import file. For instance, if you are missing a value for a required field, or a field is formatted incorrectly.



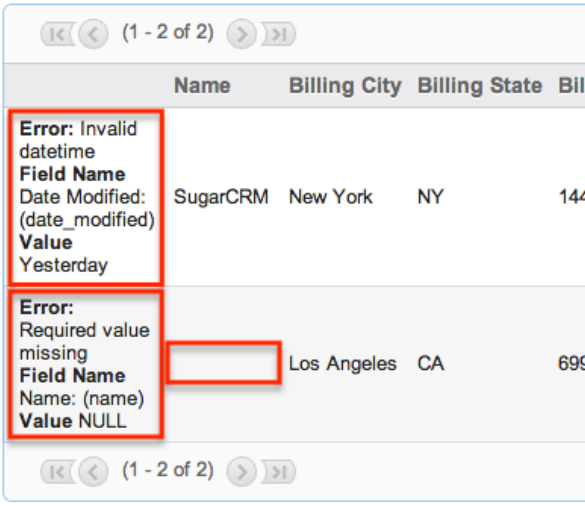

Similar to the option to download duplicate records, you also have the option to download the list of errors using the two links provided.

The "Download list of errors" option will produce a new CSV file with columns showing (from left to right) the error, the field affected, the value, and the line on your original import file where the error occurred.

| | A | B | C | D |
|---|---|---|---|---|
| 1 | Invalid datetime | Date Modified: (date_modified) | Yesterday | 2 |
| 2 | Required value missing | Name: (name) | NULL | 3 |

The "Download list of rows that were not imported" option will download a new CSV file with the same format of your original one, containing only the rows that were not imported so that you can correct the errors and then re-import.

| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | Name | Billing City | Billing State | Billing Postal | Billing Count | Date_modified |
| 2 | SugarCRM | New York | NY | 14402 | USA | Yesterday |
| 3 | | Los Angeles | CA | 69904 | USA | |



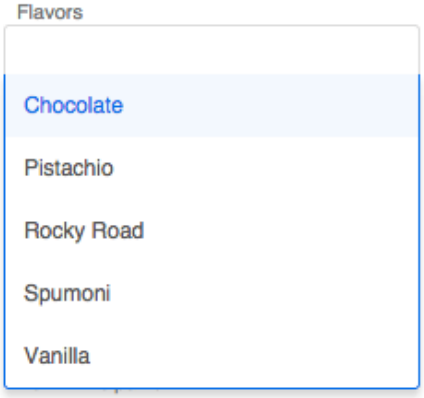

23. Once you have downloaded the desired lists and reviewed the import, the buttons mentioned in Step 21 can be used to complete your import.

## Importing Fields With Multiple Values

Multiselect fields allow for the input of multiple values. When importing data to these fields, it is possible to import multiple field values using a comma delimiter within the field.

### Importing Multiselect Fields to New Records

To import multiple values to a multiselect field on a new record, the import data file's mapped column should contain exact character matches to existing dropdown values separated by a commas. For example, a multiselect field for Flavors contains the options Chocolate, Pistachio, Rocky Road, Spumoni, and Vanilla.




To import a new record that contains both "Vanilla" and "Chocolate" in the Flavors field, the import data file's Flavors column should contain Vanilla,Chocolate with a comma separating the values and no extra spaces. If one of the imported multiselect options is a phrase, such as "Rocky Road", then the imported data field should contain a space character only within that value: Vanilla,Chocolate,Rocky Road.

| | A | B | C |
|---|---|---|---|
| 1 | First Name | Last Name | Flavors |
| 2 | Justine | Cambra | Vanilla,Chocolate,Rocky Road |
| 3 | Hugo | Bork | Vanilla,Pistachio,Chocolate |
| 4 | Jewell | Haas | Vanilla,Pistachio,Spumoni,Chocolate |
| 5 | Beulah | Randel | Chocolate |
| 6 | Abdul | Ducote | Chocolate |

Note: The dropdown option display labels are not required to be unique, so best practice is to import the database values if they are known. For more information about how admin users can see database values and display labels for dropdown options, please refer to the Dropdown Editor documentation in the Administration Guide.

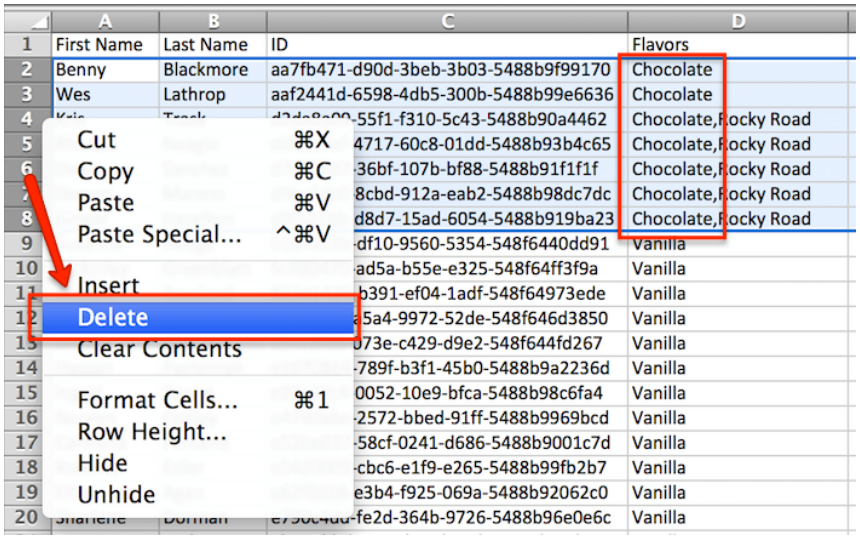
## Importing Multiselect Fields to Existing Records

Importing updates to the multiselect field of a record already existing in Sugar will erase any previous values and replace them with the imported values. If you wish to append new values to the existing values via import, you must first export the contents of the field for each record you will be updating, add the desired values to the existing values in by modifying the exported CSV file, then import the modified export file to Sugar.

For example, imagine you would like to update 100 existing contact records. Each

of the 100 contacts should have "Chocolate" added to the multiselect field "Flavors" without losing the data that is stored in the multiselect field already. The following steps explain how to append a multiselect field via import:

1. Export the list of 100 contacts that need to be updated.
2. Preserve (at least) the Last Name, ID, and Flavors fields in the export file. The other field columns may be deleted.
3. Sort the spreadsheet data by the Flavors column.
4. Remove any rows from the file that already contain "Chocolate" as a value in the Flavors column.




| | A | B | C | D |
|---|---|---|---|---|
| 1 | First Name | Last Name | ID | Flavors |
| 2 | Benny | Blackmore | aa7fb471-d90d-3beb-3b03-5488b9f99170 | Chocolate |
| 3 | Wes | Lathrop | aaf2441d-6598-4db5-300b-5488b99e6636 | Chocolate |
| 4 | | | 55f1-f310-5c43-5488b90a4462 | Chocolate,Rocky Road |
| 5 | | | 4717-60c8-01dd-5488b93b4c65 | Chocolate,Rocky Road |
| 6 | | | 36bf-107b-bf88-5488b91f1f1f | Chocolate,Rocky Road |
| 7 | | | 8cbd-912a-eab2-5488b98dc7dc | Chocolate,Rocky Road |
| 8 | | | d8d7-15ad-6054-5488b919ba23 | Chocolate,Rocky Road |
| 9 | | | df10-9560-5354-548f6440dd91 | Vanilla |
| 10 | | | ad5a-b55e-e325-548f64ff3f9a | Vanilla |
| 11 | | | b391-ef04-1adf-548f64973ede | Vanilla |
| 12 | | | 5a4-9972-52de-548f646d3850 | Vanilla |
| 13 | | | 073e-c429-d9e2-548f644fd267 | Vanilla |
| 14 | | | 789f-b3f1-45b0-5488b9a2236d | Vanilla |
| 15 | | | 0052-10e9-bfca-5488b98c6fa4 | Vanilla |
| 16 | | | 2572-bbed-91ff-5488b9969bcd | Vanilla |
| 17 | | | 58cf-0241-d686-5488b9001c7d | Vanilla |
| 18 | | | cbc6-e1f9-e265-5488b99fb2b7 | Vanilla |
| 19 | | | e3b4-f925-069a-5488b92062c0 | Vanilla |
| 20 | | | fe2d-364b-9726-5488b96e0e6c | Vanilla |

5. If the Flavors column contains any empty cells, type the word Chocolate in those cells. In the remaining cells of the Flavors column, add ,Chocolate (with a leading comma but no extra spaces) to the end of the existing character string.

| | A | B | C | D |
|---|---|---|---|---|
| 1 | First Name | Last Name | ID | Flavors |
| 2 | Justine | Cambra | f3192b55-09ce-65a7-8a57-5488b9595d78 | Vanilla,Chocolate |
| 3 | Hugo | Bork | e6280f35-6c18-1b8a-f786-5488b95a56a3 | Vanilla,Pistachio,Chocolate |
| 4 | Jewell | Haas | f0eaef66-a073-6209-4c29-5488b965d593 | Vanilla,Pistachio,Spumoni,Chocolate |
| 5 | Beulah | Randel | d1cb0162-83da-2fb2-1b1f-5488b91ba650 | Chocolate |
| 6 | Abdul | Ducote | d3c422fd-105a-8f74-5bed-5488b9aee0db | Chocolate |
| 7 | Royal | Dockins | d789f052-968d-8ae0-c781-5488b9465c56 | Chocolate |
| 8 | Toney | Denman | dc9ae08d-6c17-94ee-3fe7-5488b948499e | Chocolate |
| 9 | Hilda | Mire | dcc7362b-fb2c-24e0-78c7-5488b950e1ab | Chocolate |

6. Save this file for import.
7. Follow the steps in the Importing Updates to Existing Records section of this documentation to complete the import and update process.

## Importing Relationships

There are many situations where imports need to forge a relationship between two modules. A common example of this would be how importing contacts without an account name would leave the contacts orphaned and not linked to any parent

account. To solve this problem, Sugar allows one-to-many and one-to-one relationships to be imported during the standard import process. The available fields will vary depending on the module being imported and will show on the Import Template.

Please note that when an opportunity is imported into Sugar, a revenue line item must also be imported and related to the opportunity in order to populate the amounts (e.g. best, likely, etc.) on the opportunity record. Be sure to include the opportunity ID and amounts on the revenue line item import file.

When importing a relationship, Sugar will need the related record's unique ID, or, in some cases, will accept the record's Name field. Examples of the fields that relate one module to another are explained below.

| Module | Module Related To | Field(s) Used For Relationship | Instructions For Import |
|---|---|---|---|
| Accounts | Accounts | Member Of | On the import file, add a column for "Member Of". You can use either the Sugar record ID or the exact name of the parent account. This will cause the imported record to be related to the parent account on the "Member Of" field.<br><br>Using an account name that Sugar does not recognize will create an additional new account record.<br><br>Note: If you are using the account name, it must be exactly as it shows in Sugar. For example, if your account in Sugar is |

| | | | |
|---|---|---|---|
| | | | "SugarCRM", but your import file contains "Sugar CRM" or "SugarCRN", the account will not relate properly. |
| | | Parent Account Id | On the import template, there is a column for "Parent Account". Use the existing Sugar record ID of the parent account. The dropdown option for this is Parent Account Id. This will cause the imported record to be related to the parent account on the "Member Of" field. |
| | Campaigns | Campaign | Use the existing Sugar campaign name or campaign record ID to relate the account to the campaign record.<br><br>Note: If you are using the campaign name, it must be exactly as it shows in Sugar. For example, if your campaign in Sugar is "End of Year Newsletter", but your import file contains "End of Year News" or "End of Year Promotion", the account will not relate properly. |

| | | | |
|---|---|---|---|
| | | Campaign ID | Use the existing Sugar campaign record ID number to connect the campaign name into the new account record. |
| Calls | Contacts | Contact ID | Use the existing Sugar contact record ID number to connect the contact name into the new call record. |
| | Flex Relate | Related To Module<br><br>Related To ID | On the import template, there are columns for both "Related To Module" and "Related To ID". Both need to be used to form the proper relationship.<br><br>Related To Module:<br><br>Related To ID: The ID for the record you are relating. |
| Cases | Accounts | Account ID | Use the existing Sugar account record ID to relate the case to the account record. |
| | | Account Name | Use the existing Sugar account name or record ID to relate the contact to the account record.<br><br>Note: If you are using the account name, it must be exactly as it shows |

| | | | |
|---|---|---|---|
| | | | in Sugar. For example, if your account in Sugar is "SugarCRM", but your import file contains "Sugar CRM" or "SugarCRN", the account will not relate properly. |
| Contacts | Accounts | Account ID | Use the existing Sugar account record ID to relate the contact to the account record. |
| | | Account Name | Use the existing Sugar account name or record ID to relate the contact to the account record.<br><br>Using an account name that Sugar does not recognize will create a new account record with a relationship to the contact.<br><br>Note: If you are using the account name, it must be exactly as it shows in Sugar. For example, if your account in Sugar is "SugarCRM", but your import file contains "Sugar CRM" or "SugarCRN", the account will not relate properly. |
| | Campaigns | Campaign | Use the existing |

| | | | |
|---|---|---|---|
| | | | Sugar campaign name or campaign record ID to relate the contact to the campaign record.<br><br>Note: If you are using the campaign name, it must be exactly as it shows in Sugar. For example, if your campaign in Sugar is "End of Year Newsletter", but your import file contains "End of Year News" or "End of Year Promotion", the contact will not relate properly. |
| | | Campaign ID | Use the existing Sugar campaign record ID number to connect the campaign name into the new contact record. |
| | Contacts | Reports To | Use the existing Sugar contact record ID number to connect the new contact and the existing one. |
| | Emails | Email Address<br><br>Non-Primary Email Address | Importing an existing email address into Sugar's Contacts module will cause all email messages related to that email address may match the contact's primary or non-primary email |

| | | | |
|---|---|---|---|
| | | | address and must be exact for the relationship to form properly. |
| Leads | Accounts | Account ID | Use the existing Sugar account record ID to relate the lead to an existing account record. This is not a relationship that can be forged from the Leads module in Sugar. This can be created from an Account record, though. This relationship is usually formed through the Lead Conversion process. |
| | | Account Name | In Leads, this is just a text field. This will not create any relationships. Upon conversion, an Account can be created. For more information on converting leads, please review the documentation. |
| | Campaigns | Campaign | Use the existing Sugar campaign name or campaign record ID to relate the lead to the campaign record.<br><br>Note: If you are using the campaign name, it must be exactly as it shows in Sugar. For example, if your |

| | | | |
|---|---|---|---|
| | | | campaign in Sugar is "End of Year Newsletter", but your import file contains "End of Year News" or "End of Year Promotion", the lead will not relate properly. |
| | | Campaign ID | Use the existing Sugar campaign record ID number to connect the campaign name into the new lead record. |
| | Contacts | Contact ID | Use the existing Sugar contact record ID to relate the lead to an existing contact record. This is not a relationship that can be forged from the Leads module in Sugar. This can be created from a contact record, though. This relationship is usually formed through the Lead Conversion process. For more information on converting leads, please review the documentation. |
| | Opportunities | Opportunity ID | Use the existing Sugar opportunity record ID to relate the lead to an existing opportunity record. This is not a relationship that |

| | | | |
|---|---|---|---|
| | | | can be forged from the Leads module in Sugar. This can be created from an opportunity record, though. This relationship is usually formed through the Lead Conversion process. For more information on converting leads, please review the documentation. |
| | | Opportunity Name | In Leads, this is just a text field. This will not create any relationships. Upon conversion, an opportunity can be created. For more information on converting leads, please review the documentation. |
| | Emails | Email Address<br><br>Non-Primary Email Address | Importing an existing email address into Sugar's Leads module will cause all email messages related to that email address may match the lead's primary or non-primary email address and must be exact for the relationship to form properly. |
| Meetings | Contacts | Contact ID | |
| | | | Use the existing Sugar contact |

| | | | |
|---|---|---|---|
| | | | record ID number to connect the contact name into the new meeting record. |
| | Flex Relate | Related To Module<br><br>Related To ID | On the import template, there are columns for both "Related To Module" and "Related To ID". Both need to be used to form the proper relationship.<br><br>Related To Module:<br><br>Related To ID: The ID for the record you are relating. |
| Notes | Contacts | Contact ID | Use the existing Sugar contact record ID number to connect the contact name into the new note record. |
| | Flex Relate | Related To Module<br><br>Related To ID | On the import template, there are columns for both "Related To Module" and "Related To ID". Both need to be used to form the proper relationship.<br><br>Related To: The Sugar module's plural name for the record that you are going to relate (Accounts, Contacts, etc.). |

| | | | |
|---|---|---|---|
| | | | Related To ID: The ID for the record you are relating. |
| Opportunities | Accounts | Account ID | Use the existing Sugar account record ID to relate the opportunity to the account record. |
| | | Account Name | Use the existing Sugar account name or record ID to relate the opportunity to the account record.<br><br>Using an account name that Sugar does not recognize will create a new account record with a relationship to the opportunity.<br><br>Note: If you are using the account name, it must be exactly as it shows in Sugar. For example, if your account in Sugar is "SugarCRM", but your import file contains "Sugar CRM" or "SugarCRN", the account will not relate properly. |
| | Campaigns | Campaign | Use the existing Sugar campaign name or campaign record ID to relate the opportunity to the campaign record. |

| | | | |
|---|---|---|---|
| | | | Note: If you are using the campaign name, it must be exactly as it shows in Sugar. For example, if your campaign in Sugar is "End of Year Newsletter", but your import file contains "End of Year News" or "End of Year Promotion", the opportunity will not relate properly. |
| | | Campaign ID | Use the existing Sugar campaign record ID number to connect the campaign name into the new opportunity record. |
| Revenue Line Items | Accounts | Account ID | Use the existing Sugar account record ID to which the revenue line item's opportunity belongs<br>Note: The Account Name field in revenue line items is normally populated based on the selected opportunity's related account and cannot be manually modified on the record view. If you import using the Opportunity ID and Opportunity Name, the related account name will automatically |

| | | | |
|---|---|---|---|
| | | | populate in the Account Name field. |
| | | Account Name | Use the existing account name related to the revenue line item's opportunity<br>Note: The account name must be entered exactly as it appears in Sugar in order for the records to be related properly. |
| | Campaigns | Campaign ID | Use the existing Sugar campaign record ID number from which the revenue line item's opportunity originated |
| | | Campaign | Use the existing Sugar campaign name that is related to the revenue line item's opportunity<br><br>Note: The campaign name must be entered exactly as it shows in Sugar. For example, if your campaign in Sugar is "End of Year Newsletter", but your import file contains "End of Year News" or "End of Year Promotion", the revenue line item will not relate properly. |
| | | | |

| | | | |
|---|---|---|---|
| | Opportunities | Opportunity ID | Use the existing Sugar opportunity record ID number to relate the revenue line item to the opportunity record |
| | | Opportunity Name | Use the existing opportunity name as it appears in Sugar to relate the revenue line item |
| | Products | Product Template ID | Use the existing Sugar product catalog record ID number to relate to the revenue line item |
| | | Product | Use the existing product catalog name as it appears in Sugar to relate to the revenue line item |
| Targets | Accounts | Account Name | In Targets, this is just a text field. This will not create any relationships. |
| | Campaigns | Campaign ID | Use the existing Sugar campaign record ID number to connect the campaign name into the new target record. |
| | Leads | Lead ID | Use the existing Sugar lead record ID to relate the target to an existing lead record. This is not a relationship that can be forged from either module in |

| | | | |
|---|---|---|---|
| | | | Sugar. This relationship is usually formed through the target conversion process. For more information on converting targets, please review the documentation. |
| Tasks | Contacts | Contact ID | |
| | | | Use the existing Sugar contact record ID number to connect the contact name into the new Task record. |
| | Flex Relate | Related To ID<br><br>Related To Module | On the import template, there are columns for both "Related To ID" and "Related To Module". Both need to be used to form the proper relationship.<br><br>Related To ID: The ID for the record you are relating.<br><br>Related To Module: |

## Import File Template

The Import File Template is a very useful tool for building your import file from another source or from scratch. The template for any module can be found on the Upload Import File page, which is either the first or second page of the wizard, depending on the module.

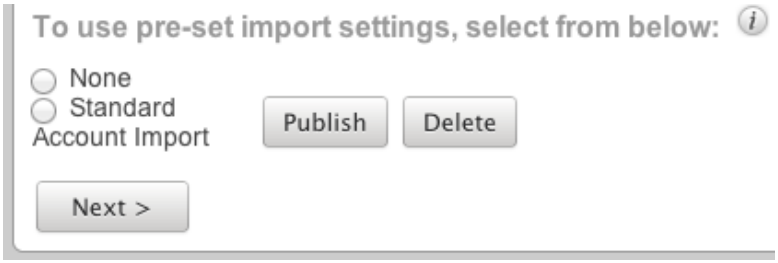
The purpose of this file is to let you know what format Sugar is going to be looking for when you perform your import. The file contains all fields for a given module, regardless of if they show on any of your layouts. The file is also properly

formatted and all settings are ready for the import. Upon opening the template, you will see a few example lines of either actual records from your instance, or, "demo data" if you have not yet performed an import. The template also contains instructions on how it is used.

It is best to use the format supplied in this template whenever possible to make your import process as seamless as possible.

## Saving Field Mappings

When importing data, there can be times where you will be using the same import file format. If this file was not exported from Sugar, that likely means that you have to re-map most of the fields on the Confirm Field Mappings screen of the Import Wizard. To save time in the future, you can use the Import Wizard's pre-set import settings.

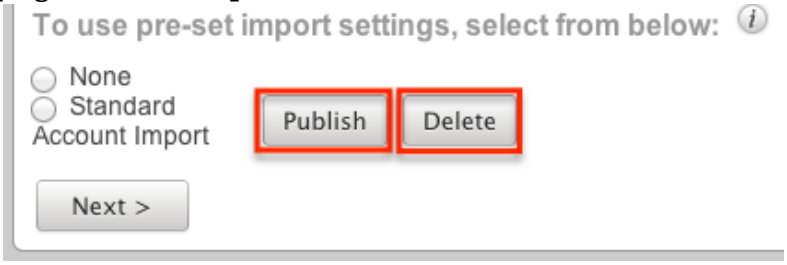



On the "Check for Possible Duplicates" page of the wizard, which is the last page before performing your import, there is a text box where you can name the import settings that you have used on this import.




Once you click "Import Now", this mapping will be saved and available for your use in future imports.

This mapping is now saved for your user and will appear on the Upload Import File page of the Import Wizard. This will include two buttons for "Publish" and "Delete".



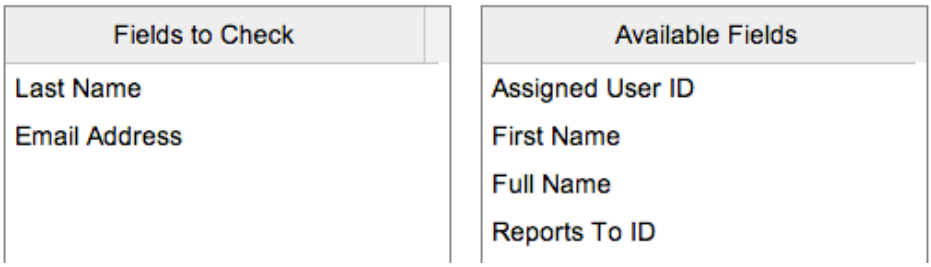

Publish : Clicking this option will make your mapping available to all users. The

Publish button will change to "Un-Publish" so that you can stop other users from using the template mapping. When it is published, it will appear as an option in the same section for other users when they perform an import.

Delete : This button will remove the pre-set import mapping for all users. This action cannot be undone.

## Detecting Duplicates

During an Import, Sugar's Import Wizard includes the functionality to check for duplicate records. When enabled, Sugar will check to see if a record already exists in Sugar with the given criteria. When checking for duplicates, Sugar will mark any record as a duplicate if it cross references against any of the duplicate fields. For example, when importing Contacts, if you select Last Name and Email Address as your duplicate check fields, any record that has a matching last name and/or a matching email address to an existing contact in Sugar will be marked as a duplicate.




The duplicate check fields used in each module differ depending on what fields are available to the module. Not all fields are used or available in the duplicate check and are pre-determined based off of system-defined indexes.

If your import file has any duplicate records based off the fields you elect to verify against, the first record will be imported, and then all subsequent records in the file matching the duplicate criteria will be flagged.

Any duplicates will show as such on the final page of the import. You will also have an option to download the duplicates so that they can be manually cross referenced to verify if they are actually duplicates. If they are not, simply re-run the import process without selecting any fields on the "Check for Possible Duplicates" page.

## External Data Sources

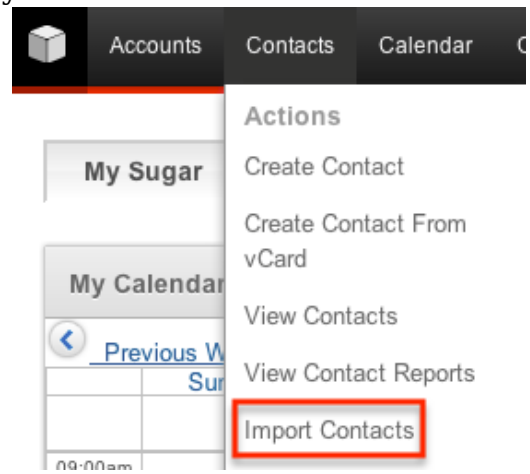
When importing data to Sugar, there are other options than importing a data file

exported from another source. Sugar offers an option to directly connect to an outside application or service though the Import Wizard and have Sugar pull the information directly from the source. This functionality is currently only available for Google Contacts.

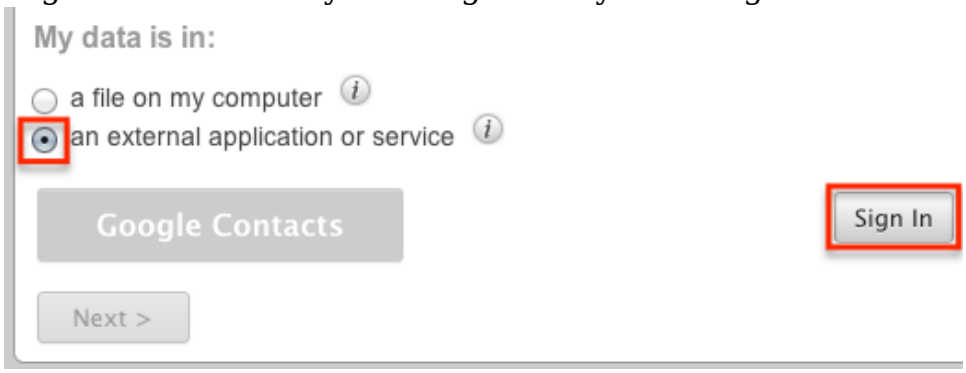
The import process is very similar to what is described above, but with some differences to speed up the process for users who would like to import all contact data into Sugar

## Importing Data From Google

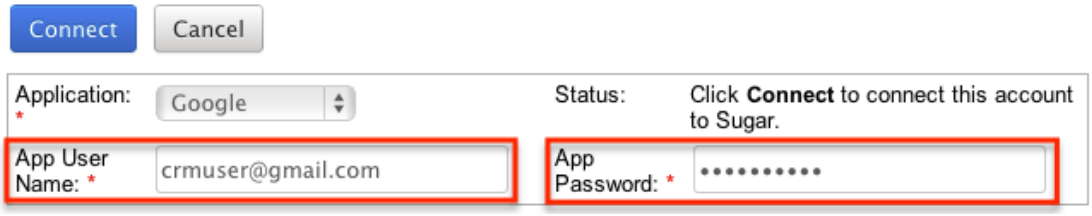
1. Navigate to the module tab for the person-type module that you are importing into and select the import option. This will open the Import Wizard and bring you to the "Select Data Source" screen.



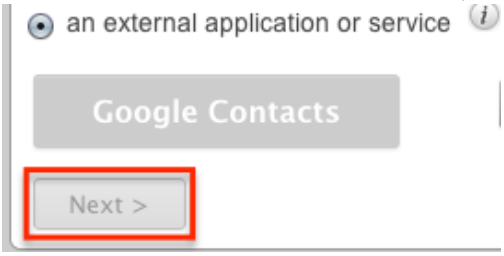

2. On the Select Data Source screen, navigate to the "My data is in:" section and choose the option for "an external application or service". This will activate a "Sign In" button for you to sign in to your Google account.



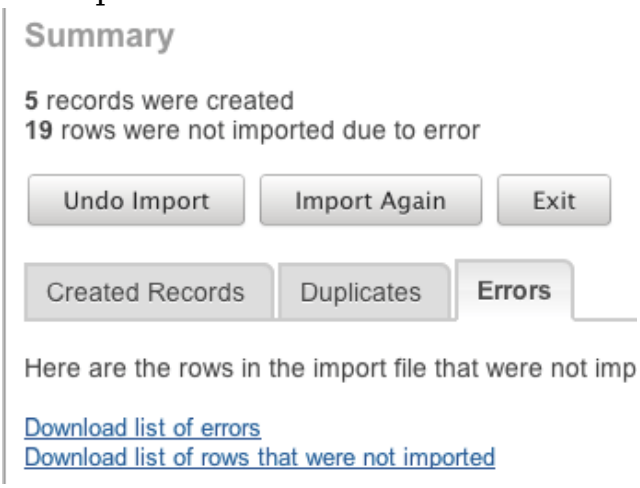

3. Fill in your user name and password for the Google account you would like to connect to and click "Connect".




4. Upon connecting, you will be brought to your user profile, on the "External Accounts" tab. Navigate back to the import screen, repeating steps 1 and 2 above. Click "Next" this time, instead of Sign In.



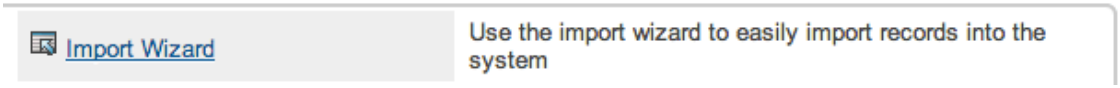

5. This will direct you to the "Confirm External Source Properties" page, which is very similar to the mapping screen from a data import from a file on your computer. Change any mapping necessary specific to your Google account and your Sugar instance. Any field in the Module Field column marked with an asterisk (*) is a required field and must be imported.
6. There is no duplicate check for this type of import, but names and email addresses are automatically checked for duplicates.
7. Click "Import Now" after you have completed your mapping.
8. On the "View Import Results" screen, you will see that all of your Google contacts have been successfully imported into Sugar.
9. Any records that were not imported due to error can be exported from Sugar and then re-imported if need be using the "Download list of rows that were not imported" link




10. To review the standard import process to re-import any additional records please review the Importing New Records section of this documentation.

## Admin Import Wizard

Administrators have special functionality available in Sugar that may not be available for all other users. One of these is access to the Admin Import Wizard. In the "Admin" menu, under the "System" panel, there is a link for "Import Wizard".




Clicking this option will bring you to the Import Wizard, similar to the one for specific modules. However, the first step here is for "Select Data Source", where you will need to select the module you wish to import data. The dropdown provided includes options for all importable modules in one convenient location. Once you select the module from the list, click "Next" and you will be directed to the standard import wizard where you can import new records or update existing ones.

Last Modified: 09/07/2016 03:04pm

# Employees

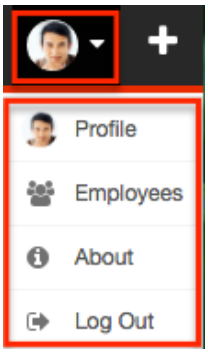
## Overview

Sugar's Employees module consists of individual people within your organization. The Employees module allows you to see a list of all employees, their contact information, and their employment status in one convenient location. Employee records are typically created when a user record is created, but users with administrative access can also add non-user employees. This means that, typically, all users will be listed as employees, but not all employees are necessarily Sugar users.

For more information on having administrators create employee records in Sugar, please refer to the Employee Management documentation in the Administration guide.

For more information on having administrators create user records in Sugar, please refer to the User Management documentation in the Administration guide.

To access the Employees module, click your profile icon on the upper right of any page in Sugar then select "Employees" in the user menu.




## Employee Fields

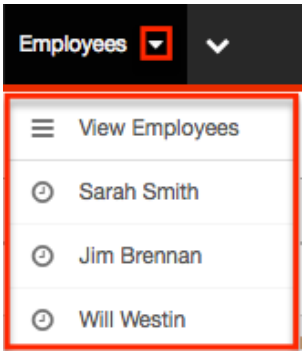
The Employees module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Fields documentation in the Administration guide.

| Field | Description |
|---|---|
| City | The city of the employee's address |
| Country | The country of the employee's address |
| Department | The department where this employee works |
| Email Address | The employee's email address |
| Employee Status | The employee's employment status in the organization, either: Active, Terminated, or Leave of Absence |
| Fax | The employee's fax number |
| First Name | The employee's first name |
| Home Phone | The employee's home phone number |
| IM Name | The employee's instant message screen name |
| IM Type | The employee's instant message client type |
| Last Name | The employee's last name |
| Mobile | The employee's mobile phone number |
| Notes | A description or other information about this employee |

| | |
|---|---|
| Office Phone | The employee's office phone number and extension |
| Other | An additional phone number for the employee |
| Picture | A picture, headshot, or identifying image of the employee |
| Primary Address | The number and street of the employee's address |
| Postal Code | The postal code of the employee's address |
| Reports to | This field list's the employee's manager, if the manager is a Sugar user |
| State | The state of the employee's address |
| Title | The employee's job title |

## Employees Module Tab

The Employees module tab can be accessed by clicking your profile icon and selecting "Employees" in the user menu. Once in the Employees list view, you can click the triangle in the Employees module tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of employees you last viewed in the module.




## Viewing Employees

There are various options available for viewing employee records in Sugar including via Employees list view, Employees detail view, and the Employees Recently Viewed menu. Please note that you will only be able to access these views by first clicking on the Employees button after clicking on your user name on the top right side of Sugar.

### Viewing Via List View

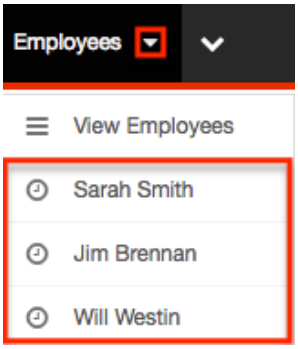
The Employees list view displays all employee records meeting the current search criteria. To access the list view, simply click the Employees option under your user name on the module tab bar. While list view shows key employee fields, you can click the employee's name to open the record in detail view. For more information on viewing employees via list view, please refer to the Employees List View section of this documentation.

### Viewing Via Detail View

The Employees detail view displays thorough employee information by showing all employee fields. The detail view can be reached by clicking an employee record's link from the Employees list view. For more information on viewing employees via detail view, please refer to the Employees Detail View section of this documentation.

### Viewing Via Recently Viewed

As you work, Sugar will keep track of which employees you have recently viewed. Click the triangle in the Employees module tab to see a list of the 3 records you most recently viewed in the module. Clicking the record's name (e.g. Will Westin) within the list will open the record in detail view.




## Searching Employees

The Employees list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Employees list view below. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search,

you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.

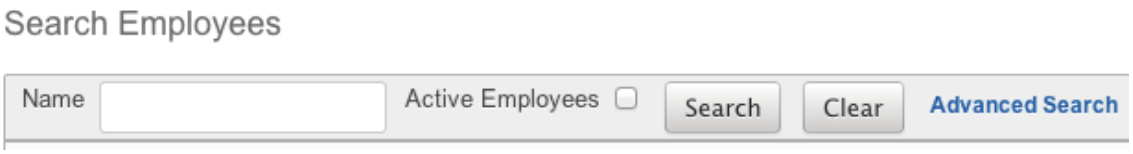
For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

## Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.

The buttons and checkboxes available in Basic Search panel have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- Active Employees : Select this box to return only records where Employee Status is Active.




When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "Active Employees" and enter an employee's name, Sugar will only return employee records with a matching name that are active. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all employee records, simply click "Clear" and then "Search" to perform a blank search with no filters.

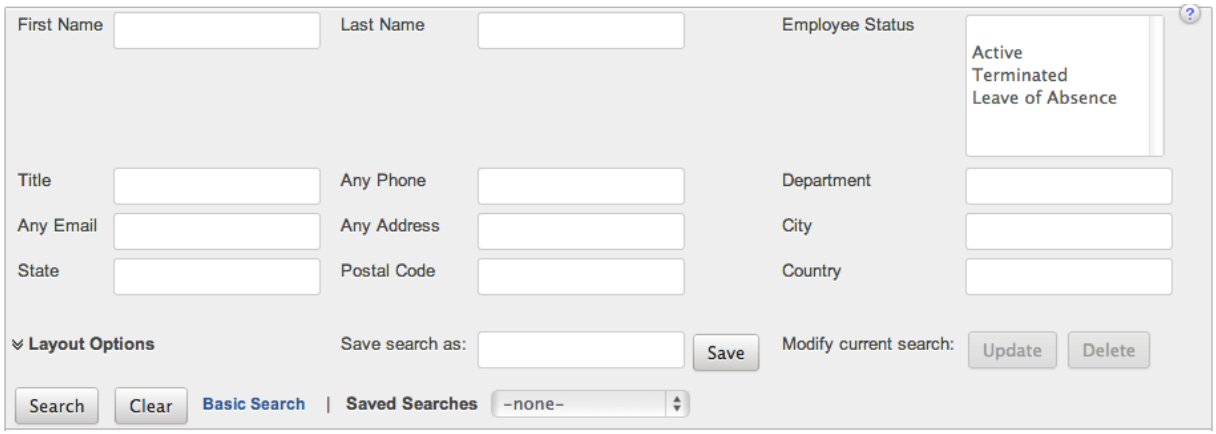
Administrators can configure what fields appear on the Employees Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Advanced Search

Advanced Search offers a more in-depth search experience than Basic Search including additional fields, layout options, and saved search capability. From the Advanced search panel, you can click "Basic Search" for simplified searching.

The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- Active Employees : Select this box to return only records where Employee Status is Active.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the Layout Options section of the Search documentation.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section of the Search documentation.




When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "Active Employees" and enter an employee's name, Sugar will only return employee records with a matching name that are active. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all employee records, simply click "Clear" and then "Search" to perform a blank search with no filters.

Administrators can configure what fields appear o n the Employees Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Employees List View

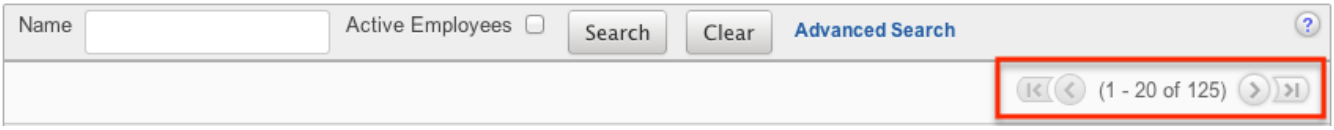
The Employees list view displays all employee records meeting the current search criteria. You can view the basic details of each employee within the field columns.

You have the option to change what fields are displayed in list view by configuring your layout options in the Employees Advanced Search. For more information on configuring your list view, please refer to the Layout Options section of the Search documentation. Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Pagination

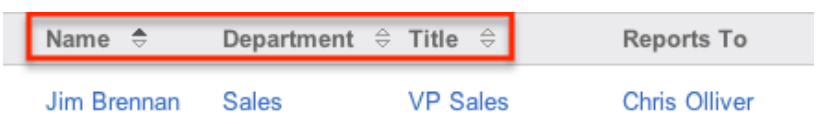
List view displays the current search results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. To the right just below the search panel you can see which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of your current results.

By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.




## Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header, noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time. You can also set a default order-by column using the layout options in Advanced Search. For more information on setting a default column sort, please refer to the Layout Options section of the Search documentation.



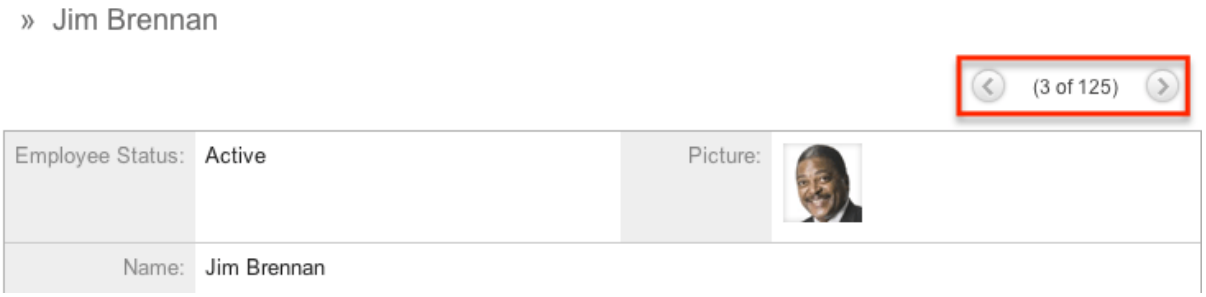
## Employees Detail View

The Employees detail view displays thorough employee information by way of all employee fields grouped into one page.

Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

### Next or Previous Record

On the upper right of the Employees detail view, there are two buttons that allow you to page through each employee in the Employees list view's current search results. Clicking the Previous button displays the previous employee of the current search results while clicking the Next button displays the next employee of the current search results. The text in between shows which employee result you are currently viewing within the total number of current results.




Last Modified: 01/26/2017 02:56pm

# Mobile Browser

## Overview

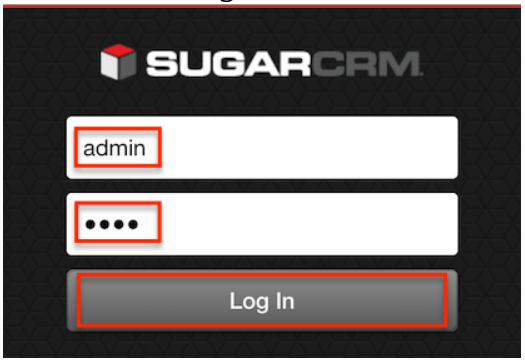
Sugar mobile browser enables users to access their Sugar instance via the browsers on their mobile devices (e.g. iPhone, Android, etc.) to perform various actions and manage their records. The SugarCRM Mobile application is also available to be installed directly on supported Apple iOS and Android devices. Similar to the desktop Sugar application, you will be able to access records in most modules that are assigned to you, your teams, and your direct reports for various modules (e.g. Accounts, Contacts, Calls, etc.). This documentation will cover how

to access, navigate, and utilize your Sugar instance via the mobile browser.

## Accessing Sugar Via Mobile Browser

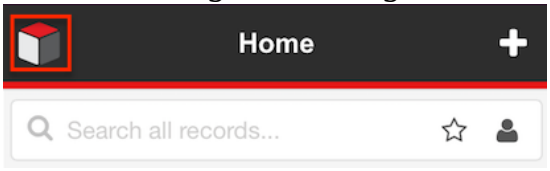
Users can access their Sugar instance via the mobile browser on their mobile device. To access your Sugar account, enter your instance URL (e.g. https://example.sugarondemand.com) in your mobile browser to load Sugar's login screen. Please note that if you are unable to access Sugar via the mobile browser using your instance URL, append "&mobile=1" to the end of your URL then try reloading the page.

Once the login page loads, enter the same login credentials (username and password) you normally use to access your Sugar instance in a desktop browser then click "Login".



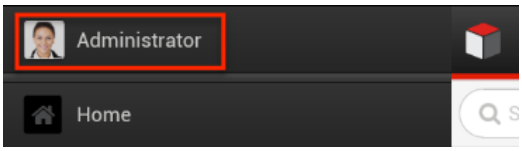

## Main Menu

The main menu can be accessed from any page by tapping the Sugar cube icon at top left. Tap the cube again to close the menu. The menu will open from the left and allow you to work with your user profile, access Sugar modules, view information about the application, configure the application, access the desktop version of Sugar, and log out.




### Profile

Your user profile is available for viewing and editing by tapping your name or the user icon at the top of the main menu.



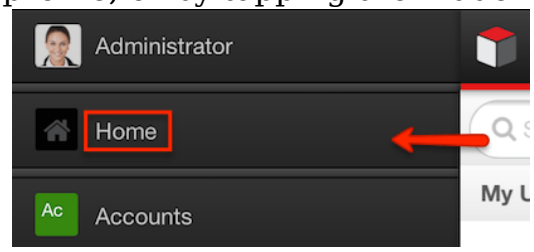

Tap any field value to access the keyboard for editing. Once in edit mode, you can tap the "x" icon to the right of the field to remove the value as well as use the keyboard to alter the value. Tap "Done" to finish working with a single field and close the keyboard. When you are done working with your user profile, tap "Save" to preserve your changes or "Cancel" to discard any changes and return to the main menu.




Note: Fields which are unavailable for editing are greyed out.

## Home

Users can navigate back to the home screen by clicking "Home" below the user profile, or by tapping the hidden screen on the right.




For more information on the Home screen features, please see the Home Page section of this documentation.

## Sugar Modules

Below your user profile and home button are the list of Sugar modules to which you have access within Sugar via the mobile browser.

The following modules may be made available for use in the mobile browser by your administrator via Admin > Mobile. For more information on controlling which modules are available in the mobile browser, please refer to the System documentation in the Administration guide.

- Accounts
- Calls
- Cases
- Contacts
- Documents
- Employees
- Meetings
- Notes
- Opportunities
- Quotes
- Reports
- Tasks
- Any Custom Module

Please note that your ability to access the above modules may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you cannot access the above module.

Tapping one of the Sugar module names will open its list view. For more information on working within a module, please refer to the List View section of this page.

## About

The About page shows the following information in addition to providing the privacy policy and terms and conditions.

- App Version : The version of your mobile browser application
- Server Version : The version and edition of the Sugar instance which the application is accessing
- Server URL : The URL of the Sugar instance which the application is accessing
- Support : The Sugar Support email address where support cases may be raised

## Settings

Language

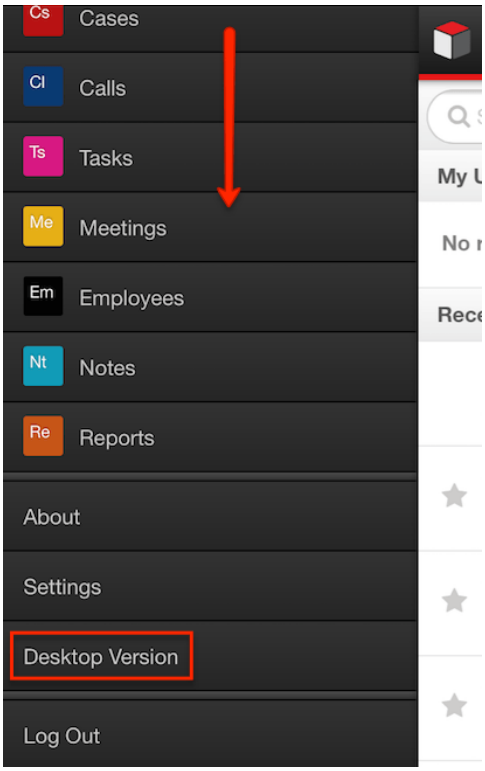
The Settings page allows you to configure what language your mobile browser application will use. While English is the default language, the stock Sugar languages are available for use:

- Czech
- Bulgarian
- Chinese
- Danish
- Dutch
- English-UK
- Estonian
- French
- German
- Hungarian
- Italian
- Japanese
- Lithuanian
- Norwegian
- Polish
- Portuguese
- Romanian
- Russian
- Spanish
- Swedish
- Turkish

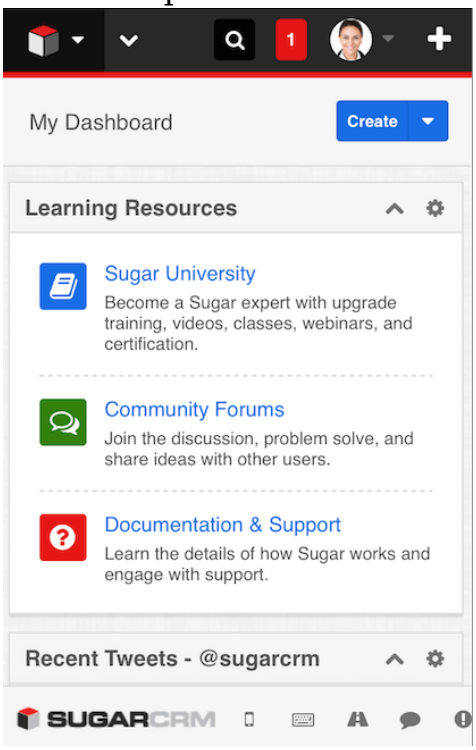
Note: Right-to-left languages are not available for use within Sugar via the mobile browser.

## Desktop Version

The Desktop Version option will switch the view on your device to the desktop view and navigate to your Sugar instance's login screen. To switch views, scroll down in the main menu and tap the Desktop Version button.



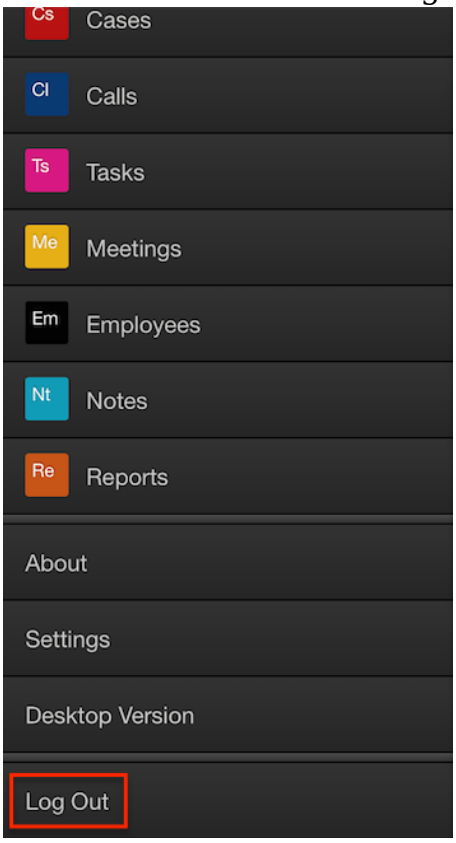

The user will be prompted to login in again. Once completed, you can access the full desktop version from the browser.




This can be useful when you desire to access a module or perform an action in Sugar which is not supported in the mobile browser.

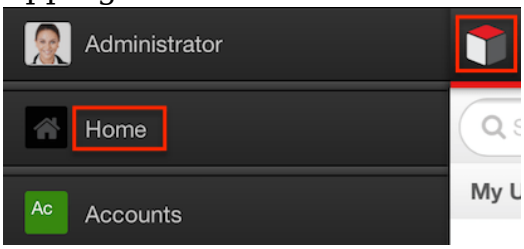
## Log Out

Tapping "Log Out" from the main menu will return to the mobile browser login screen where you can access the same instance from a different user or access a different installation of Sugar.




## Home Page

When logging into the Sugar instance via the mobile browser, your home page will be shown. This page gives you a quick look at your upcoming scheduled activities and your most recently modified records in addition to providing a global search. You can navigate to your Home page from anywhere within the application by tapping the cube icon to access the main menu then choosing "Home".

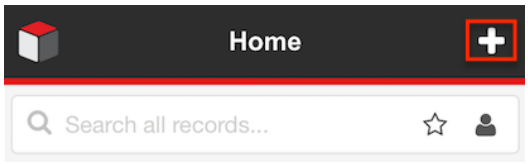


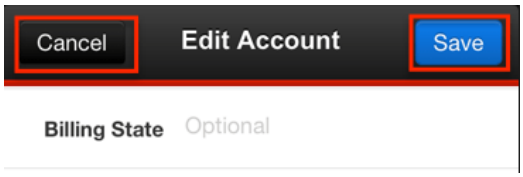

### Quick Create

The Quick Create button appears on the top of the Home page's header bar. From the Home page, the Quick Create menu will allow you to create a new record of

any type which you have access to create in the mobile browser.

The following steps will cover creating a new Account from the Home page quick create as an example:

1. Navigate to the Home page by tapping "Home" within the main menu.
2. Tap the "+" quick create button at the top right of the page and choose "Create Account".


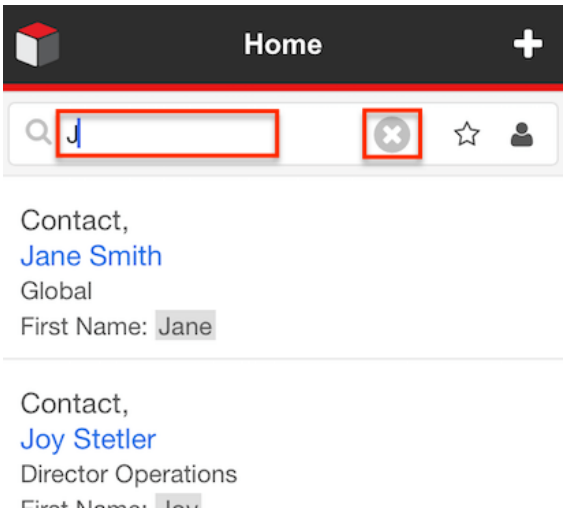
3. Fill in all desired fields using the instructions in the Editing Records section of this documentation as needed.
Note: Fields which are not required will show "Optional" in grey to the right of the field name.
4. When all desired fields are populated, tap "Save" to create the new account record. Tapping "Cancel" will return you to the Home page without creating a new record.



Please note that your ability to create records in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Create options.

Note: Document, Employee, and Quote records may not be created or duplicated from Sugar via the mobile browser. Note records may be created, but the mobile browser does not support attaching files to these records.

## Global Search

Sugar via the mobile browser allows you to search across all modules at once from the global search at the top of the Home page. Tap the search box and begin typing the name of a record you wish to access. The records list will automatically update to match records with names containing a word which starts with the characters you have typed. Tap the Done button to hide the keyboard and view all matching records. Tapping the "x" within the search bar will clear your search and return you to the Home page.




If your instance utilizes full text search or your device is offline enabled, wildcards can be used to search for criteria without including the entire word in the search. The following wildcard characters may be used:

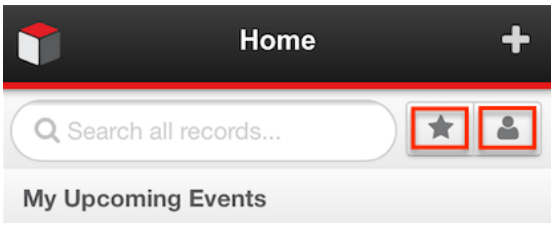
| Character | Wildcard Use |
|---|---|
| % or * | Matches any number of characters, including zero |
| ? | Matches only one character |

Note: The wildcard character (%) is automatically appended to the end of your search phrase.

If your Sugar instance utilizes full text search, records matching any field which has been enabled for full text search will be returned. Beneath each returned record's name will be the field within that record that matched your search term. For more information on configuring full text search, please refer to the Search documentation in the Application guide.

## Filters

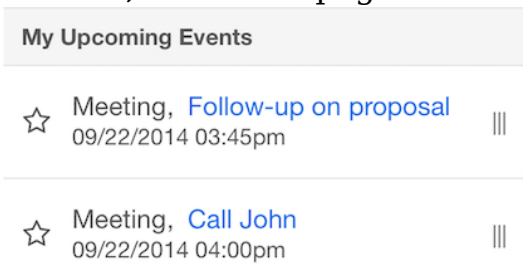
All records on the Home page may be filtered using the two filter buttons to the right of the global search bar. The star icon marks the Favorites filter which, when activated, will cause your Home page to only show records you have marked as favorites. The user icon marks the My Records filter which, when activated, will cause your Home page to only show records where you are the assigned user. You can turn each filter on or off by tapping the appropriate button.




Note: When a user logs in to Sugar via the mobile browser, the Home page will default to having the My Records filter activated.

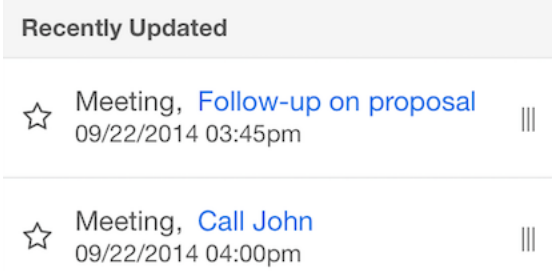
## My Upcoming Events

When no global search is being performed, the top of the Home page shows a list of your upcoming meeting records in the list titled "My Upcoming Events". Tapping on any meeting will open the record in detail view. You can also use each record's actions menu to perform several operations on it. When the Home page's favorites filter is activated, this list will only show you upcoming meetings which you have marked as favorites. Since this list only consists of your own meeting record's, the Home page's user filter will have no effect.



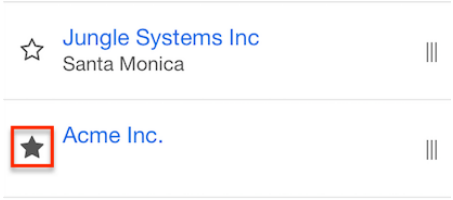

## Recently Updated

When no global search is being performed, the Home page shows your Sugar instance's most recently modified records below the list of your upcoming meeting records. Tapping on any row will open the record in detail view. You can also use each record's actions menu to perform several operations on it. When the Home page's user filter is activated, this list will show the most recently modified records which are assigned to you. When the favorites filter is activated, it will only show the most recently modified records which you have marked as favorites.



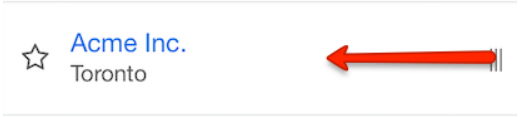
## Favorites Designation

Users have the option to mark records as favorites via the Home page in addition to list view and detail view. This allows users to designate records that are important or will be viewed often so that they can easily be found using filters. Records which you have marked as favorites will have a gray star to their left on the Home page. You can tap the white star of any record to designate it as a favorite or tap a gray star to remove that record's favorite designation.

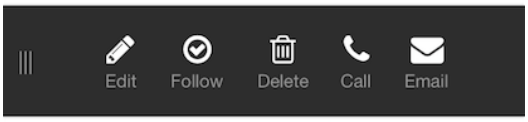



## Actions Menu

From the home page you can access a menu of actions to be performed on a single record by tapping the grip icon of any record's row to the left.

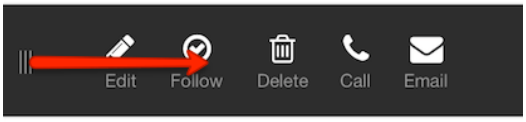



Doing so will open a context-sensitive menu of actions available for this record meaning that the options available will differ according to the type of record and the fields it has populated. Some or all of the following actions may appear:




For a full list of available actions and a description of each, please refer to the Record Actions section of this page.

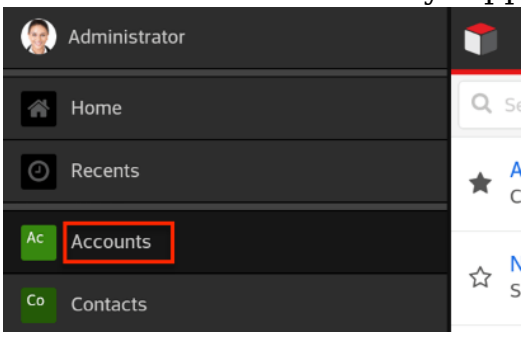
To close the menu without taking any action, tap the grip icon again.




# List View

The mobile browser's list view lists records within a specific module as well as providing tools for searching, creating, and working with those records. List views

can be accessed from the main menu by tapping any module name. For example, tapping "Accounts" will open the Accounts list view. From a list view, you can return to the main menu by tapping the cube icon.



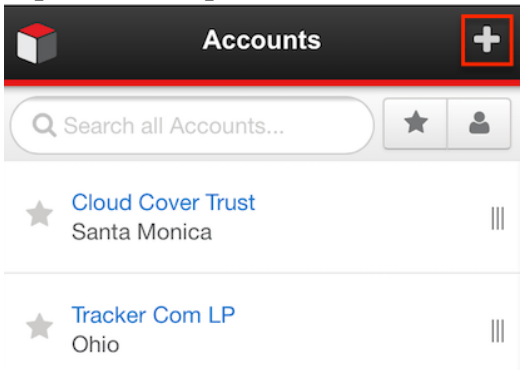

Administrator users have the ability to configure which two fields appear on the list view of each module as well as what actions are available on the list view's actions menu using Studio from the desktop Sugar application. For more information on configuring this mobile layout, refer to the Mobile Layouts section within Studio documentation in the Administration guide.

## Quick Create

The Quick Create button appears on the top of the list view's header bar for most modules. Please note that the Employees and Reports list views do not have Quick Create buttons because creation of employee records and reports are not supported in the mobile browser.

The following steps will cover creating a new Account from the Accounts list view quick create as an example:

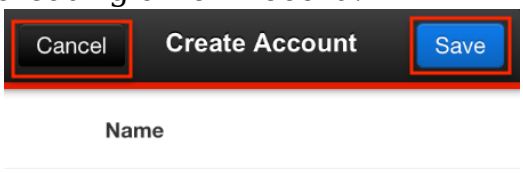
1. Navigate to the Accounts list view by tapping "Accounts" within the main menu.
2. Tap the "+" quick create button at the top right of the page.




3. Fill in all desired fields using the instructions in the Editing Records section of this documentation as needed.
   Note: Fields which are not required will show "Optional" in grey to the right

of the field name.

4. When all desired fields are populated, tap "Save" to create the new account record. Tapping "Cancel" will return you to the Accounts list view without creating a new record.

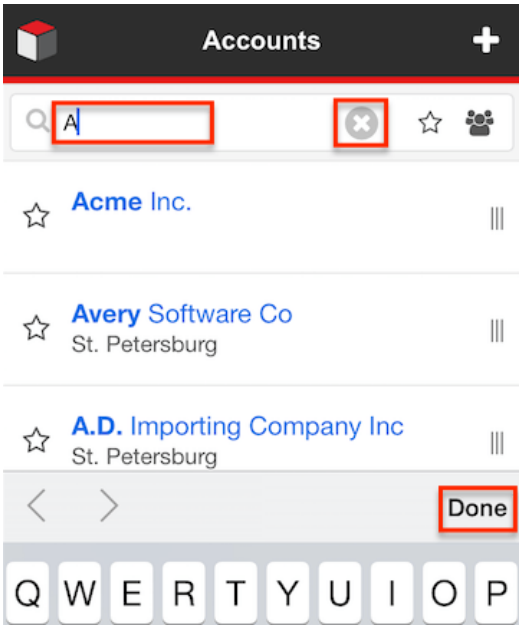



Please note that your ability to create records in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Create options.

Note: Report, Document, Employee, and Quote records may not be created or duplicated from mobile browser. Note records may be created, but the mobile browser does not support attaching files to these records.

## Search

Each module can be searched to quickly locate desired records. Tap the search box and begin typing the name of a record you wish to access. The records list will automatically update to match records with names starting with the characters you have typed. Tap the Done button to hide the keyboard and view all matching records. Tapping the "x" within the search bar will clear your search and again show all records.




If your instance utilizes full text search or your device is offline enabled, wildcards

can be used to search for criteria without including the entire word in the search. The following wildcard characters may be used:

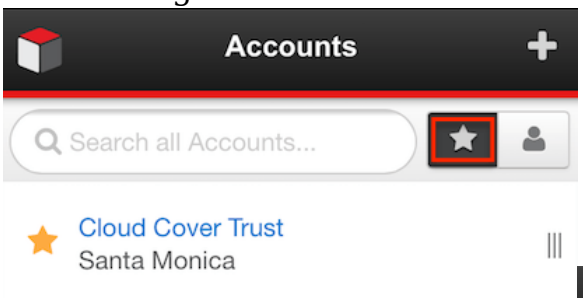
| Character | Wildcard Use |
| --- | --- |
| % or * | Matches any number of characters, including zero |
| ? | Matches only one character |

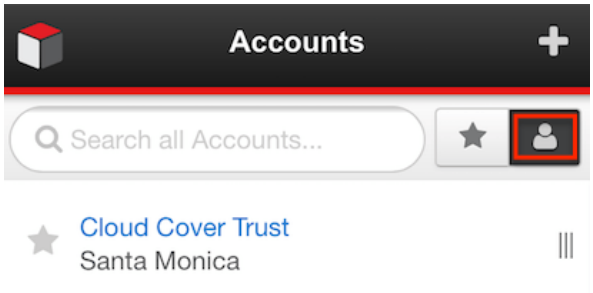
Note: The wildcard character (%) is automatically appended to the end of your search phrase.

If your Sugar instance utilizes full text search, records matching any field which has been enabled for full text search will be returned. Beneath each returned record's name will be the field within that record that matched your search term. For more information on configuring full text search, please refer to the Search documentation in the Application guide.

## Filters

In addition to searching for record names, you can filter the list of records in your list view. Tap the star icon to only show the records which you have marked as favorites. Tapping the star again will turn off this filter and again show all records. Tap the user icon to only show records to which you are assigned. Tapping the user icon again will turn off this filter and again show all records.

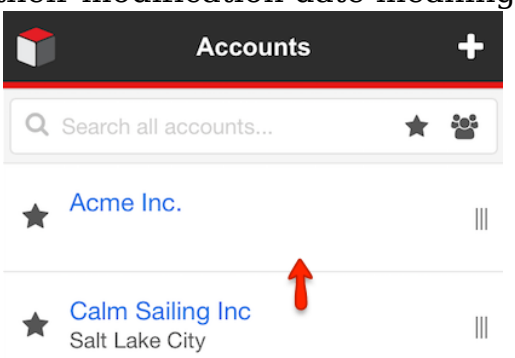



## Records List

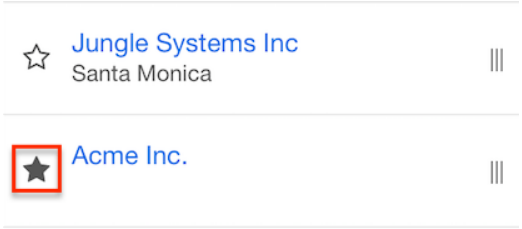
Below the search and filters bar is a list of records within the current module which will be limited by any current filtering or search. The records are ordered by

their modification date meaning the most recently edited records appear on top.



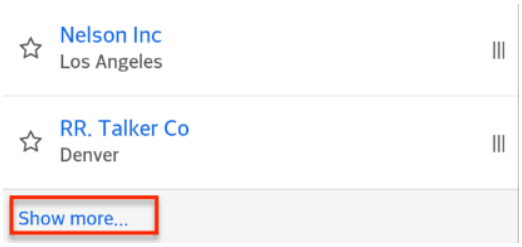

## Favorite Designation

Users have the option to mark records as favorites via the list view as well as the record detail. This allows users to designate records that are important or will be viewed often so that they can easily be found using filters. Records which you have marked as favorites will have a gray star to their left on list views. You can tap the white star of any record to designate it as a favorite or tap a gray star to remove that record's favorite designation.




## Show More

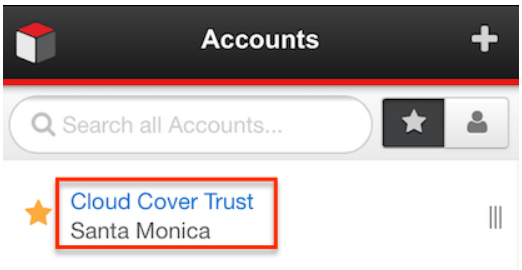
Each list view will initially show the 20 most recently modified records. In order to see additional records, scroll to the bottom of the list and tap "Show More". Each time you tap "Show More", an additional 20 records will be displayed at the end of the list.



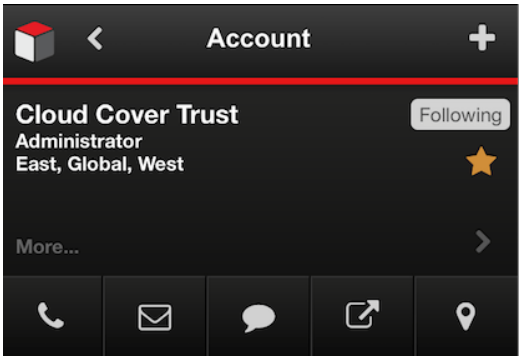

# Detail View

The mobile browser's detail view shows the details and related records of one

specific Sugar record as well as providing the ability to edit and perform other actions on the record. Detail views can be accessed from many places in the application by tapping any record's name within a list of records. For example, tapping a row on the Accounts list view or on the Home page will open the record in detail view.

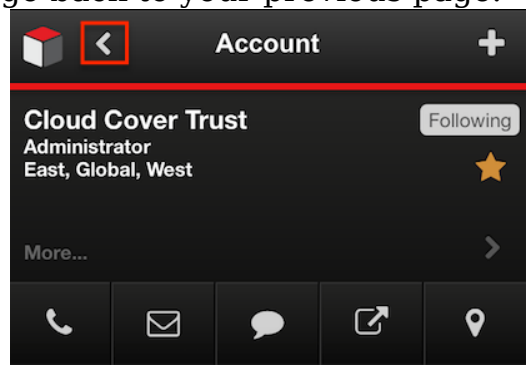



Administrator users have the ability to configure what fields appear on the detail view of each module using Studio from the desktop Sugar application. For more information on configuring this mobile layout, refer to the Mobile Layouts section within Studio documentation in the Administration guide.



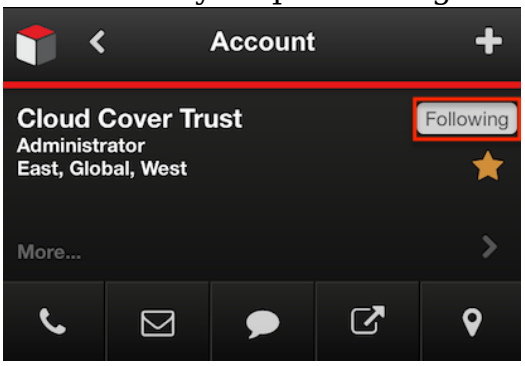

## Previous Page

To the right of the main menu cube icon on each detail view is an arrow that will return you to the last page viewed. This is a convenient way to continue your work after viewing or making changes on a record's detail view. Simply tap the arrow to go back to your previous page.



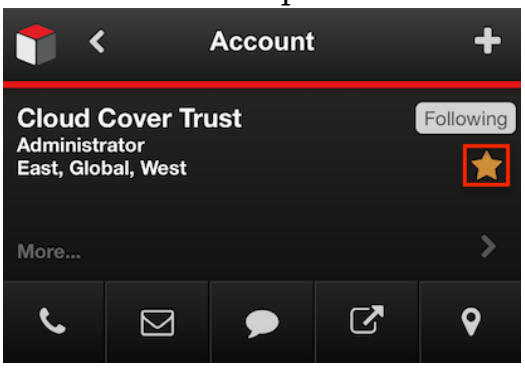

## Following Designation

Users may choose to follow a record using the Follow button via the record detail view as well as the list view. This allows each user to personalize the activity streams visible in the desktop version of Sugar by specifying which records' posts should appear there. You may also stop following a record by tapping this button again. Please note that users automatically follow records they create or to which they are assigned. Should a user lose access to a record in Sugar, they will automatically stop following that record.



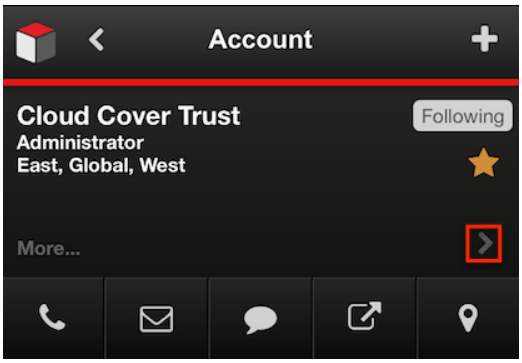

## Favorites Designation

Users have the option to mark records as favorites via the record detail view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be filtered for within the list view. Records which you have marked as favorites will have a white star to the right of their name on detail view. You can tap the grey star of any record to designate it as a favorite or tap a white star to remove that record's favorite designation.



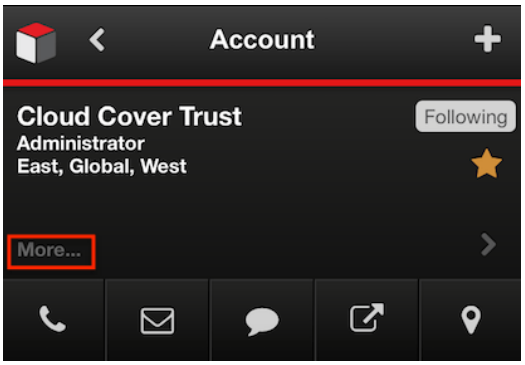

## Record Information

A few basic fields including the record's name, assigned user, and assigned team(s) will be displayed on the detail view. You can view the record's other fields by tapping the right arrow to the bottom right of this basic information. Doing so will open the record in edit view where you can make changes to the record in addition to viewing these additional fields.




## More...

The More... (and ...Less) link will appear whenever there are more than 7 fields requested in Studio > [Module Name] > Mobile Layouts > Mobile DetailView.

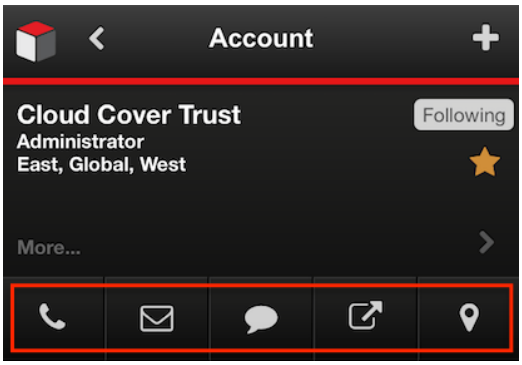



Users can minimize the detail view by tapping the Less... link.

Note: Fields such as phone number, email address, website, and address do not show up as text within the detail view, as they are associated to the action buttons.

## Actions Menu

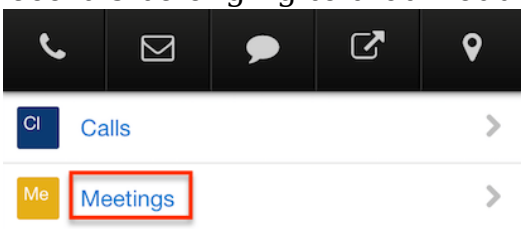
A record's detail view offers a menu of actions to be performed on the current record. This is a context-sensitive menu which will grey out any actions which are not available for the current record. For example, if the record does not have a populated phone number field, the Call and SMS options will not be available. Some or all of the following actions may be available:



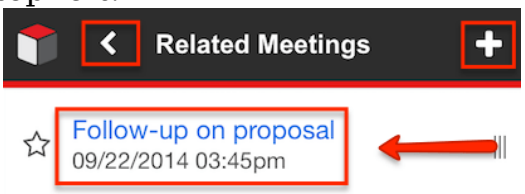

For a full list of available actions and a description of each, please refer to the Record Actions section of this page.

## Related Records

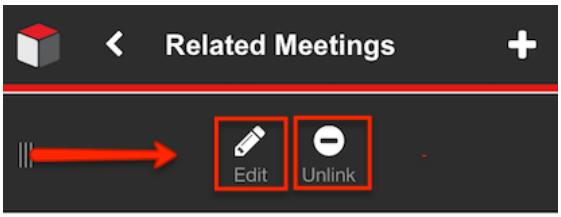
Below the detail view's actions menu are the record's related records. For each relationship where your record can be related to multiple record's in another module, the module type will be shown here. Tap the module name to see a list of record's belonging to that module which are related to the original record.



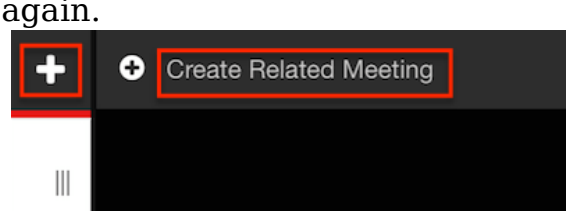

From this list of related records, you can tap the record's row to open its detail view.To return to the original record's detail view, tap the previous page icon at top left.




Swiping any row's grip icon to the left will display an actions menu. Choose "Edit" to edit the related record or "Unlink" to delete the relationship between this record and the original record. Please note that this will not delete either record. To close the menu without taking any action, tap the grip icon back to the right.
Note: Depending on the record type, more or less options will appear (i.e. Related Contacs - in addition to Edit, Unlink, it also has the ability to Call and Email).

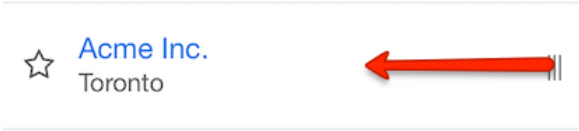



Tap the plus icon at the top right of the related records list to quick create a new related record. Once saved, the new record will automatically be related to the original record. To close the menu without creating a new record, tap the plus icon again.

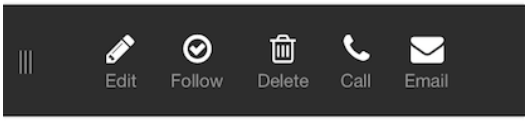



## Record Actions

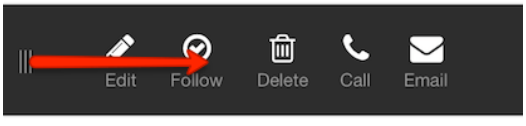
The mobile browser offers context sensitive menus for performing operations on individual records. These Action menus are available for items in a records list such as on a module's list view, the Home page, or a list of related records. To access this context-sensitive menu from a records list, tap the grip icon of any record's row in list view to the left.



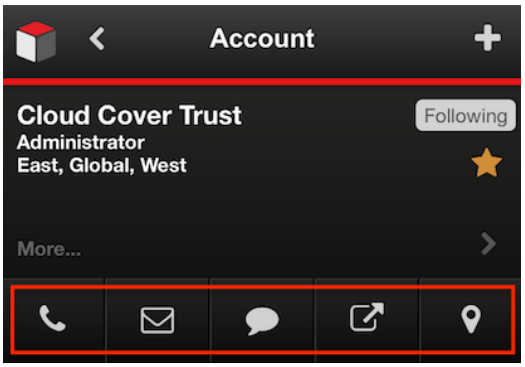

Doing so will open a context-sensitive menu of actions available for this record meaning that the options available will differ according to the type of record and the fields it has populated. Some or all of the following actions may appear:




To close the menu without taking any action, tap the grip icon back to the right.




Action menus are also available from each individual record's detail view.




The actions available within menus on record lists and detail views allow you to perform the following operations:

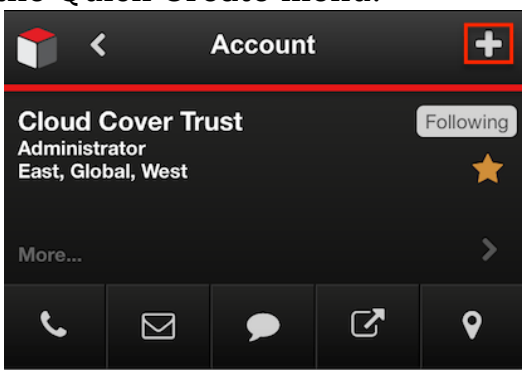
| Menu Item | Description |
|---|---|
| Edit | Opens the record for editing |
| View | For records not able to be edited, opens the record for detailed viewing |
| Follow/Following | Follows / Unfollows record depending on role and permissions |
| Delete | Deletes the record from your Sugar instance |
| Call | For records with a phone number, calls the number from your phone |
| SMS | For records with a phone number, sends a text message from your phone |
| Email | For records with an email address, sends an email from your phone |
| Web | For records with a website, opens the website in your phone's browser |
| Map | For records with an address, maps the address in your phone's map application |
| File | For records with attached images or files, opens the attached file for viewing |

Please note that the File icon may display in the context-sensitive actions menu even when a record has no attachment.

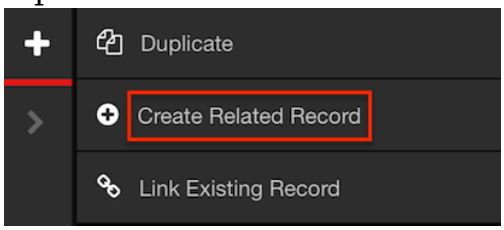
## Creating New Related Records Via Quick Create

Use the following steps to create a new related record from a detail view's quick create menu:

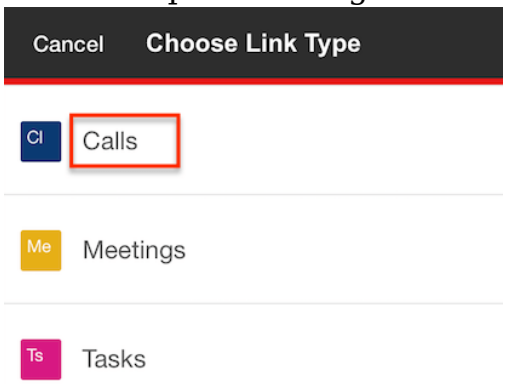
1. Navigate to a record's detail view and tap the plus icon at top right to access the Quick Create menu.



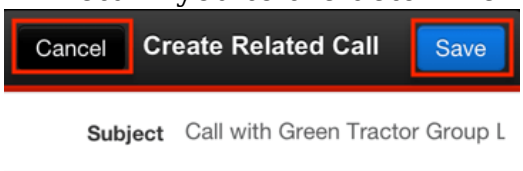

2. Tap the "Create Related Record" option.




3. On the "Choose Link Type" page which appears, select the module of the new record you wish to create. The modules shown are all those which have a relationship to the original record's module.




4. The displayed edit view is pre-populated with the original record's name as appropriate. Complete the desired fields using instructions in the Editing Records section and tap "Save" to create the new record. Tapping "Cancel" will return you to the detail view without creating a record.



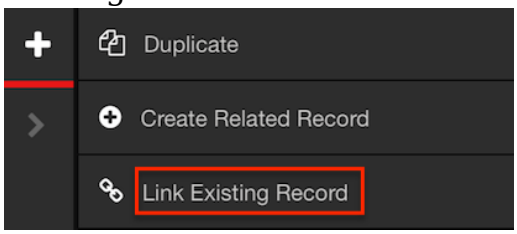

Please note that your ability to create records in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Create options.

Note: Report, Document, Employee, and Quote records may not be created or duplicated from the mobile browser. Note records may be created, but the mobile browser does not support attaching files to these records.

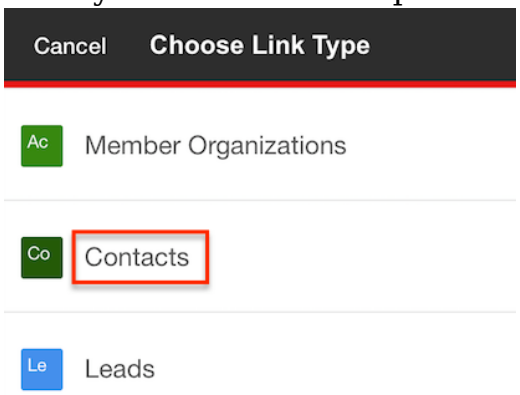
## Relating Existing Records Via Quick Create

Use the following steps to relate an existing record from a detail view's quick create menu:

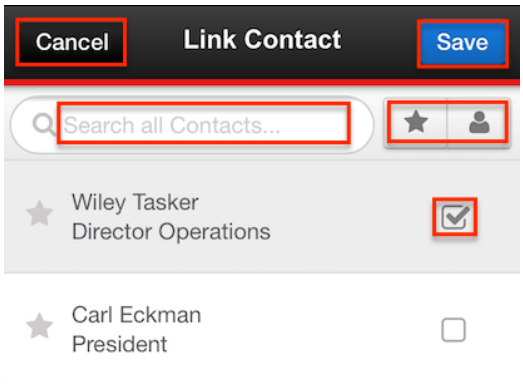
1. Navigate to a record's detail view.
2. Tap the plus icon at top right to access the Quick Create menu. Tap "Link Existing Record".




3. On the "Choose Link Type" page which appears, select the module of the existing record you wish to link. The modules shown are all those which have a many-sided relationship to the original record's module.



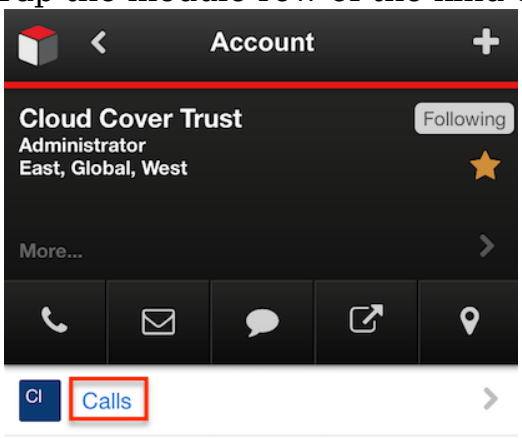

4. Use the search and/or filters to locate the records you wish to relate to the original record. Select one or more record's checkboxes and tap "Save" to form the link. Tapping "Cancel" will return you to the detail view without relating any records.



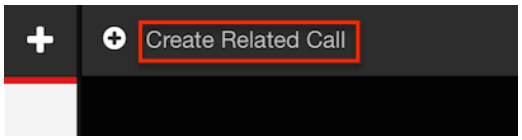

## Creating Related Records Via Related Modules List

Use the following steps to create a new related record from a detail view's related modules list:

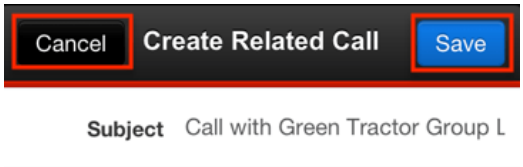
1. Navigate to a record's detail view.
2. Tap the module row of the kind of record you wish to relate.




3. Tap the plus icon to access the Quick Create menu. Tap "Create <Module Name>".




4. The displayed edit view is pre-populated with the original record's name as appropriate. Complete the desired fields using instructions in the Editing Records section and tap "Save" to create the new record. Tapping "Cancel" will return you to the previous page (e.g. Related Calls page) without creating a record.



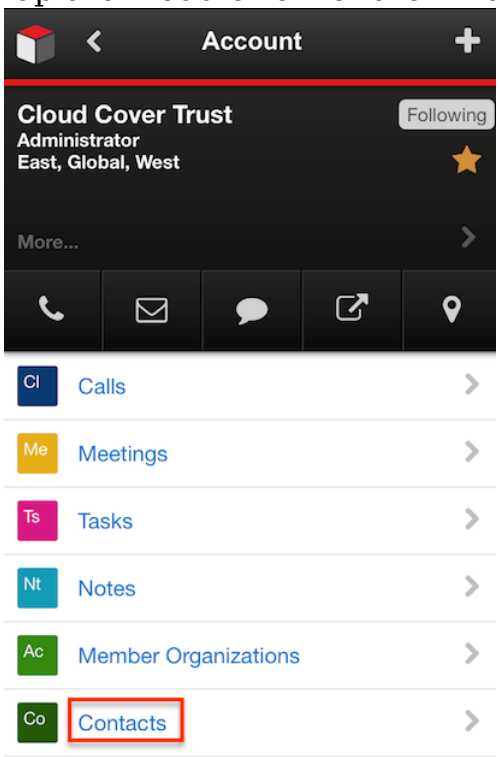
Please note that your ability to create records in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Create options.

Note: Report, Document, Employee, and Quote records may not be created or duplicated from the mobile browser. Note records may be created, but the mobile browser does not support attaching files to these records.

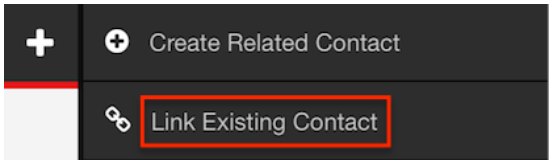
## Relating Existing Records Via Related Modules List

The following steps demonstrate how to relate an account to an existing case from the detail view's related modules list as an example:

1. Navigate to a record's detail view.
2. Tap the module row of the kind of record you wish to relate.

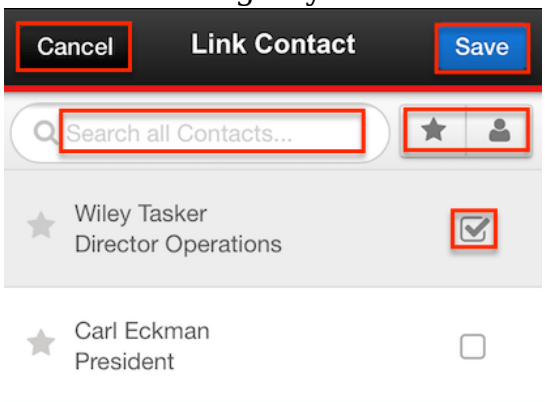



3. Tap the plus icon to access the Quick Create menu. Tap "Link Existing Contact".




4. Use the search and/or filters to locate the records you wish to relate to the original record. Select one or more record's checkboxes and tap "Save" to form the link. Tapping "Cancel" will return you to the Related Contacts page

without relating any records.

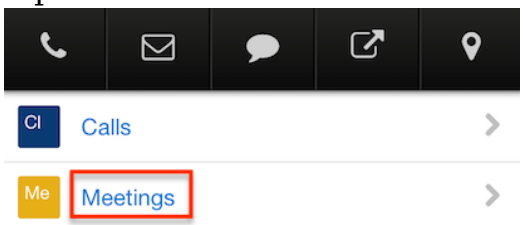



## Editing Related Records

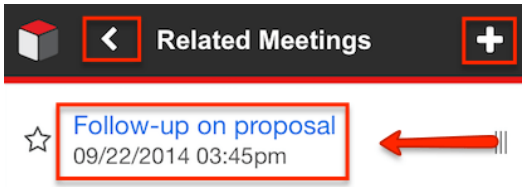
You can edit a related record directly from another record's list of related records.

Use the following steps to edit a related record from another record's detail view:

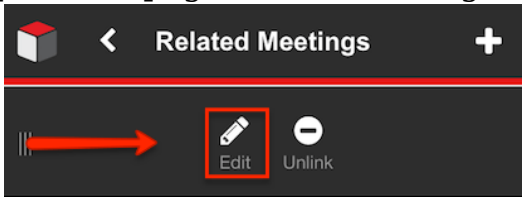
1. Navigate to a record's detail view.
2. Tap the module row of the record you wish to edit.



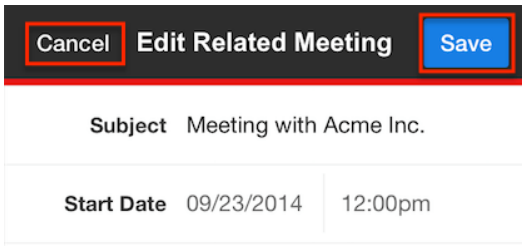

3. Locate the desired record in the list of related records and tap the grip icon to the left to access the record's actions menu.




4. Tap "Edit". Swiping the grip icon back to the right will return you to the previous page without editing the record.




5. Modify the files as desired using instructions in the Editing Records section, then tap "Save" to preserve your changes. Tapping "Cancel" will return you to the previous page (e.g. Related Meetings page) without editing the record.



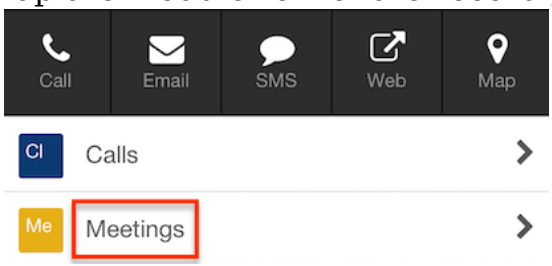

Please note that your ability to edit records in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

## Removing Related Records

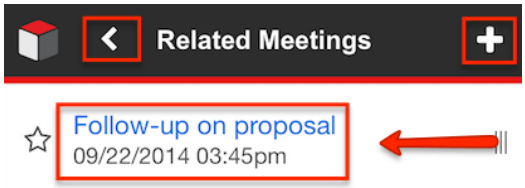
If a relationship should no longer exist between two records, the records may be unlinked. Deleting the relationship will not delete either record.

Use the following steps to delete a relationship from detail view:

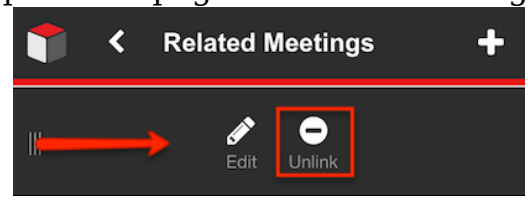
1. Navigate to a record's detail view.
2. Tap the module row of the record you wish to unlink from the original record.




3. Locate the desired record in the list of related records and tap the grip icon to the left to access the record's actions menu.




4. Tap "Unlink" and confirm in the dialog that you wish to delete the relationship. Swiping the grip icon back to the right will return you to the previous page without unlinking the records.



# Creating Records

New records may be created in the mobile browser from several different locations. You can create new records from the Home page, from a module's list view, by duplicating an existing record, or by creating a related record via the Quick Create menu or a related modules list.

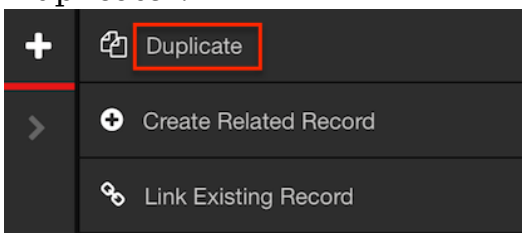
Please note that your ability to create records in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Create options.

## Creating Via Duplication

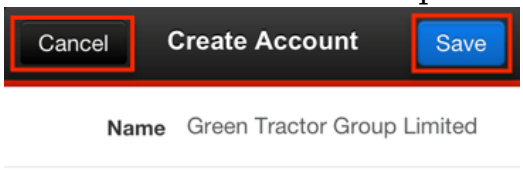
Records may be duplicated as a method of creating new records when a record with similar field values already exists in Sugar.

Use the following steps to create a contact by duplicating an existing record:

1. Navigate to a record's detail view.
2. Tap the plus icon at top right to access the Quick Create menu. Tap "Duplicate".



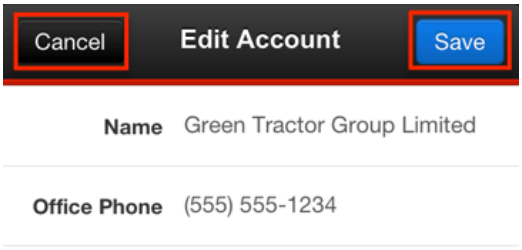

3. The displayed edit view is pre-populated with the original record's values. Update the necessary fields using instructions in the Editing Records section of this documentation, then click "Save". Tapping "Cancel" will return you to the detail view without duplicating the record.




# Editing Records

Records may be edited from the mobile browser by first navigating to the detail view, then tapping the more information arrow at bottom right of the record's

basic fields. This will open the record in edit view where values can be viewed and modified. Fields which are not required will show "Optional" in grey to the right of the field name. Once you have made the desired modifications to a record's fields, tap "Save" to preserve the changes. You can tap "Cancel" at any time to return to the previous page without editing the record.




Administrator users have the ability to configure edit view using Studio from the desktop Sugar application. For more information on configuring this mobile layout, refer to the Mobile Layouts section within Studio documentation in the Administration guide.

Please note that your ability to edit records in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not have the ability to edit records.

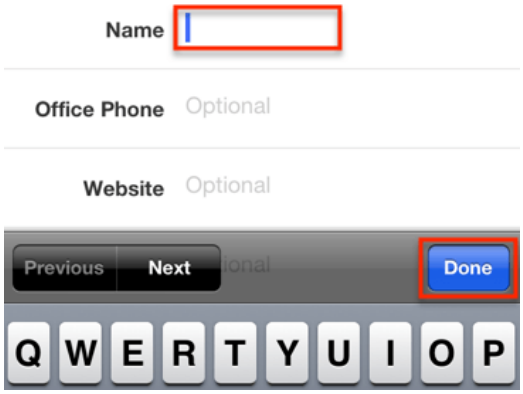
Note: Employee, Quote, and Report records may not be edited in the mobile browser. Document and Note records' fields may be edited, but the mobile browser does not support attaching new files.

## Editing Text & Number Fields

Text and number fields allow you to store manually input information such as names, addresses, phone numbers, etc.

Use the following steps to edit text and numeric fields:

1. Tap to the right of the field name.
2. Use the keyboard which appears to type the desired value.
3. Tap "Done" to preserve the value and hide the keyboard.

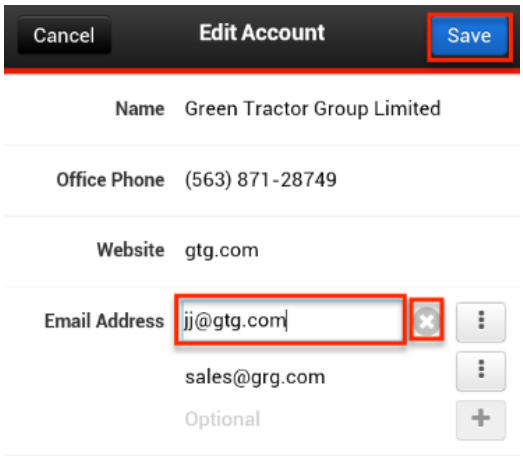



## Editing Email Addresses

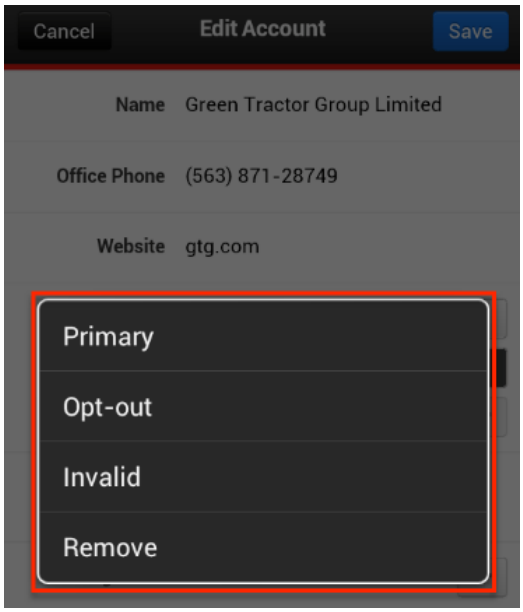
Email address fields can store one or more email addresses as well as a designation of whether they are the primary email address for a record, are opted-out, or are invalid.

Use the following steps to edit an email address:

1. Tap the email address' location to type in a new address or edit an existing one.




2. Tap the options menu to the right of an email address to set it as the primary email address for the record, mark it as opted-out, mark it as invalid, or remove it.

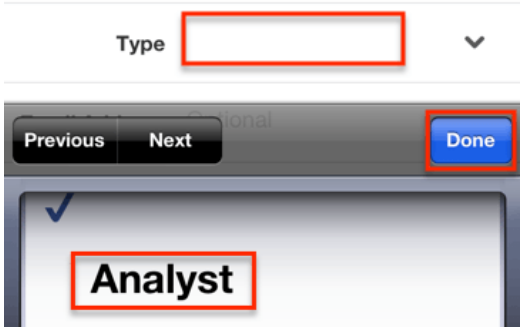



## Editing Dropdown Fields

Dropdown fields allow you to choose one value from a list of predefined options.

Use the following steps to edit a dropdown field:

1. Tap to the right of the field name.
2. Use the picker which appears to find and tap the desired value. Tapping "Done" will hide the option picker without setting a new value.

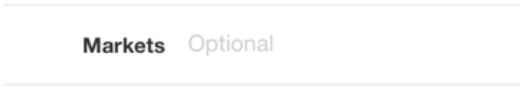



## Editing Multiselect Fields

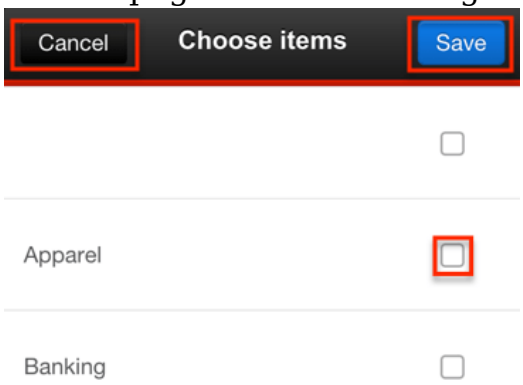
Multiselect fields allow you to choose one or more options for a single field.

Use the following steps to edit a multiselect field:

1. Tap the multiselect field.



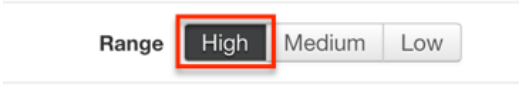

2. Mark the checkboxes of the items you wish to select. If you wish to have no items selected, choose the blank option.
3. Tap "Save" to preserve your new values. Tapping "Cancel" will return you to the edit page without altering the field's value.




## Editing Radio Fields

Radio fields allow you to choose one of a few options for the field value.

To edit a radio field, tap the desired value.




## Editing Checkbox Fields

Checkbox fields allow you to select one of two options for the field value.

To edit a checkbox field, tap the checkbox to toggle whether it is checked or not.

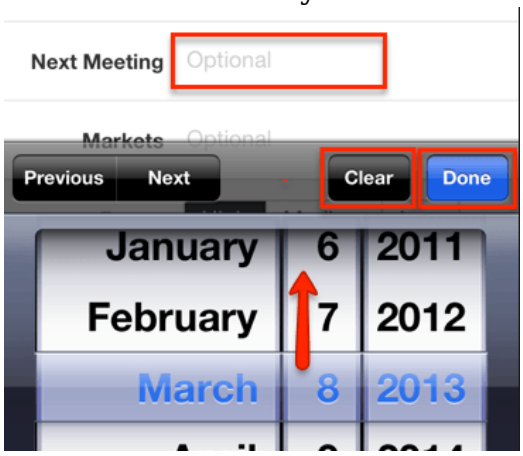



## Editing Date & DateTime Fields

Date fields allow you to set a day, month, and year to a single field. Datetime fields also include the selection of a time.

Use the following steps to edit date or datetime fields:

1. Tap the date or datetime field.
2. Spin the picker to select the desired date and, for datetime fields, time.
3. Tap "Done" to preserve your new value. Tapping "Clear" before tapping "Done" will return you to the edit page with a blank value for the field.

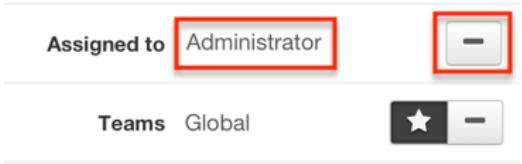



## Editing Relate & Relationship Fields

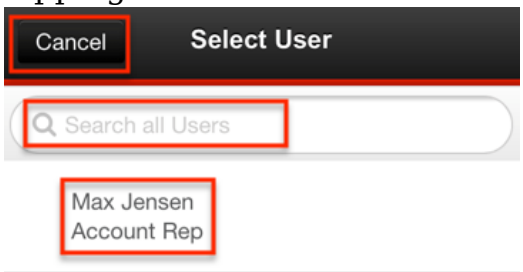
Relate fields allow you to create a one-way link from your original record to another record in Sugar. Relationships allowing only one link from your original record to another module are edited the same way. The Assigned User field of each record is an example of such a field.

Use the following steps to edit a relate field or relationship fields:

1. Tap the minus button to the right of a current value to remove it first or simply tap the relate field to choose a different value.




2. Search for and select the desired record to relate to your original record. Tapping "Cancel" will return to the fields list without selecting a new value.



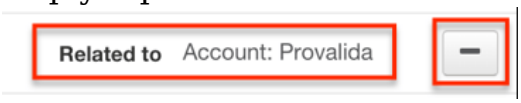

Note: If any view includes a relate field to a disabled module, the view will display "No Access" in the mobile browser.

## Editing Flex Relate Fields

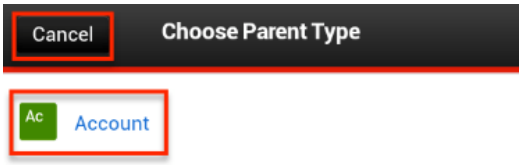
Flex relate fields allow you to relate a record to another record in the module of your choosing rather than restricting you to one module as relate fields do.

Use the following steps to edit a flex relate field:

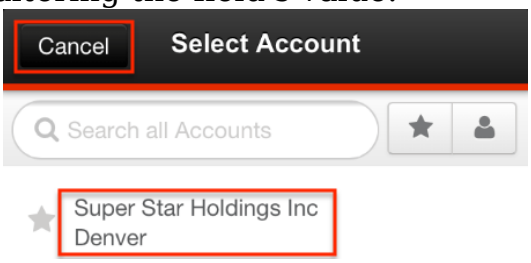
1. Tap the minus button to the right of a current value to remove it first or simply tap the flex relate field to choose a new value.




2. Use the Choose Parent Type page to choose the module you would like to relate to. Tapping "Cancel" will return you to the edit page without altering the field's value.




3. Search for and tap the desired record to relate it to your original record. Tapping "Cancel" will return you to the Choose Parent Type page without altering the field's value.

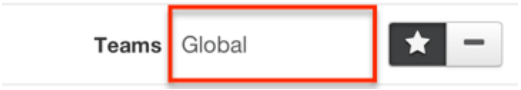



## Editing Teams

The team field specifies which team or teams of users have visibility of each record.

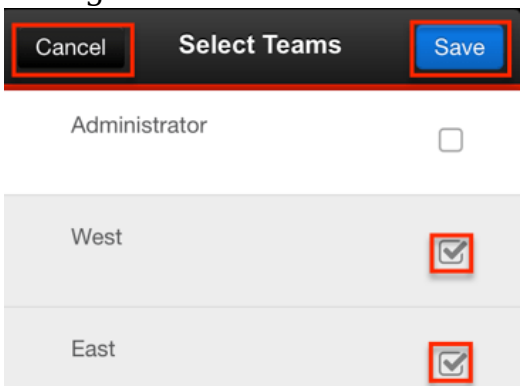
Use the following steps to edit a record's assigned teams:

1. To add an assigned team, tap the team field.

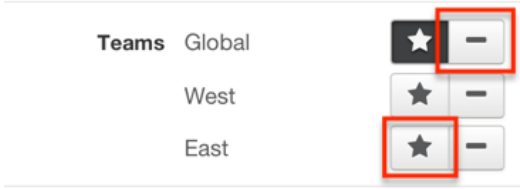



2. Use the Select Teams page to search for and mark the checkboxes of teams you wish to assign to the record.

3. Tap "Save" to add the chosen teams or "Cancel" to return to the page without adding new teams.




4. To remove any unwanted teams, tap the team's minus button.
5. To designate the record's primary team, tap the team's star button.

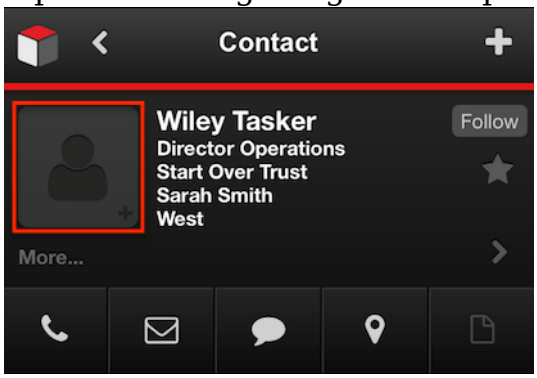



## Editing Image Fields

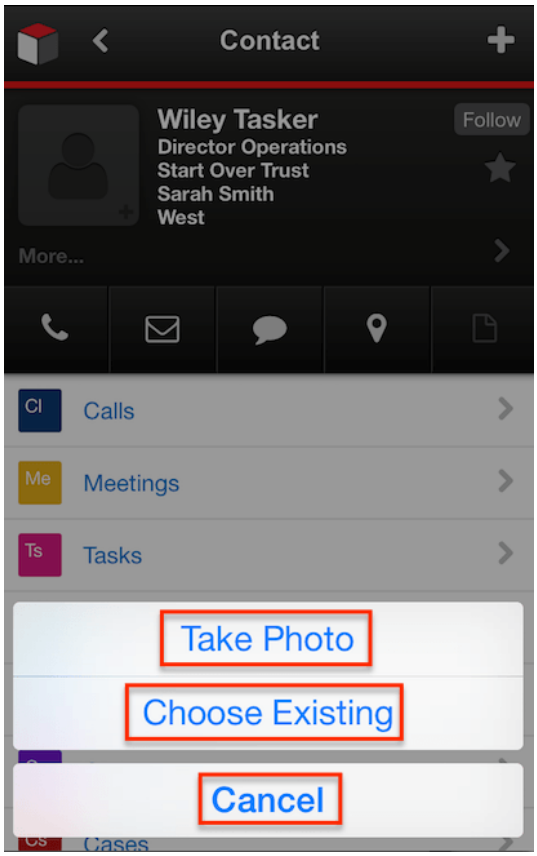
The Contacts module allows its Picture field to be edited via the mobile detail view or edit view. Please note that only the Contact module's image field, Picture, may be edited via the detail view.

Use the following steps to edit a contact record's Picture field via the detail view:

1. Navigate to a contact record in detail view.
2. Tap the existing image or the placeholder image icon.




3. Tap "Take Photo" to use your device's camera to take a new picture or tap "Choose Existing" to select a photo from your device's photo album.

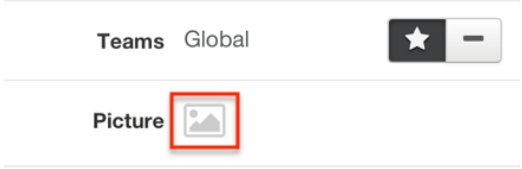



4. To make no changes to the Picture field, tap "Cancel".

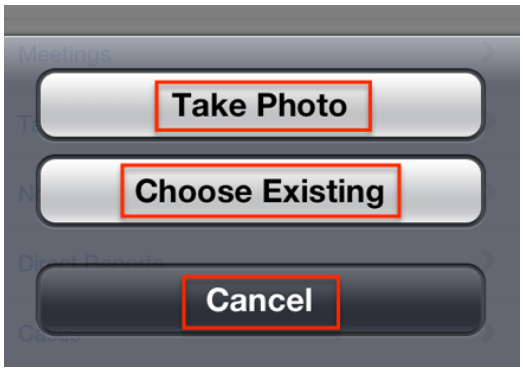
You may also edit the image-type field of any module using your mobile device as long as the image field is present on the module's mobile edit view. For more information on modifying mobile layouts, refer to the Mobile Layouts section within Studio documentation in the Administration guide.

The following steps will cover editing a lead's image-type field via the edit view as an example:

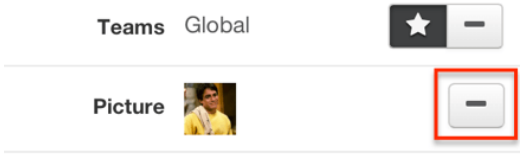
1. Navigate to a lead record in edit view.
2. Tap the existing image or the placeholder image icon.




3. Tap "Take Photo" to use your device's camera to take a new picture or tap "Choose Existing" to select a photo from your device's photo album.




4. To make no changes to the Picture field, tap "Cancel".
5. To remove an image, tap the minus icon.




6. Tap "Save" to preserve your changes to the image-type field and other changes to the record.

## Deleting Records

You may delete records at any time from the mobile browser. Keep in mind that doing so will delete the records in your Sugar instance just as if you had deleted them from your desktop computer. Deleting records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

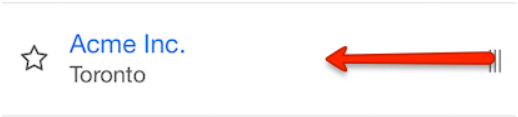
Please note that your ability to delete records in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

### Deleting Via Records List

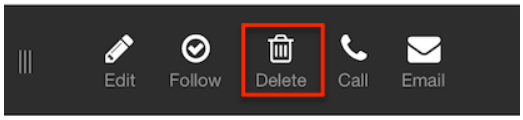
Records may be deleted from the lists of records available on the Home page and any list view. Records may not be deleted from a list of related records, only their relationship can be deleted from this screen using the Unlink option. To delete a related record rather than simply unlinking it, you must first tap the related record's name to open its detail view, then use the instructions in the Deleting Via Detail & Edit View section of this documentation to delete it.

Use the following steps to delete records from a list of records on the Home page or any list view:

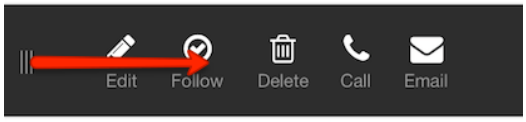
1. Tap the grip icon on any record's row to the left.




2. Tap the Delete option and confirm in the dialog that you wish to delete the record.




3. To close the actions menu without deleting, tap the grip icon back to the right.

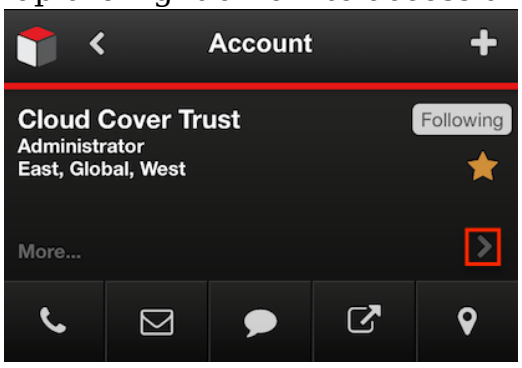



## Deleting Via Detail & Edit View

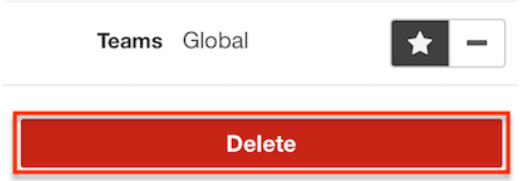
Records may also be deleted when viewing the detail view of any record by accessing the record's edit view.

Use the following steps to delete a record from detail view:

1. Open a record's detail view by tapping its link anywhere in the application.
2. Tap the right arrow to access the record's edit view.




3. Scroll to the bottom of the edit view and tap "Delete".



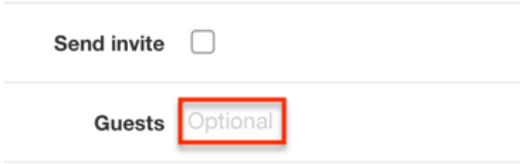

4. A pop-up message will display asking for confirmation. Tap "Yes" to proceed.

# Inviting Call and Meeting Attendees

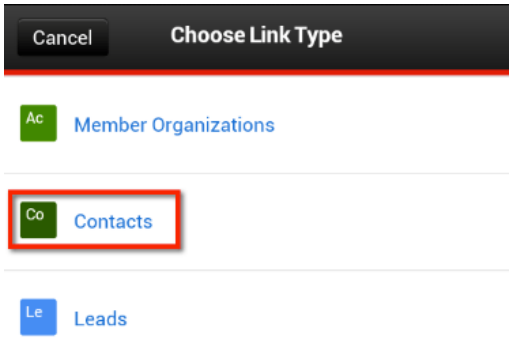
Attendees may be added to an existing call and meeting records by relating the desired contact, lead, or user using the call or meeting's subpanels. Attendees may also be added during the call or meeting creation process using the Guests field.

The following steps cover adding contacts as attendees to a call record as an example:

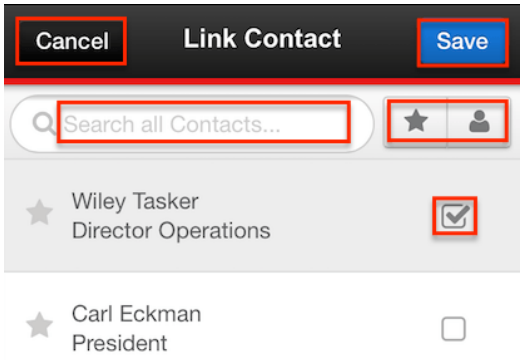
1. Create a new call or meeting record and populate the desired fields.
2. Scroll to the bottom and tap the Guests field.



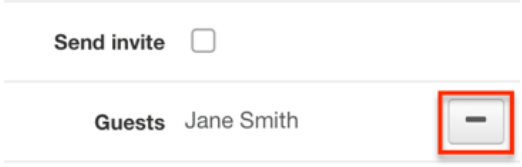

3. On the Choose Link Type page, select the module of the individual you'd like to add.



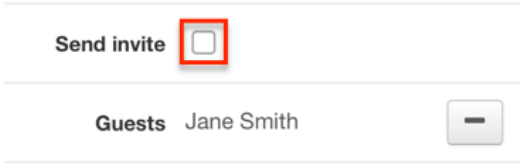

4. Search for and select the person or people you wish to invite. Tap "Save". Tap "Cancel" to return to the call creation without adding any attendees.




5. To remove an unwanted attendee, tap the minus icon next to the individual's name.



6. To have an invitation sent via email to your attendees, check the "Send Invite" box.



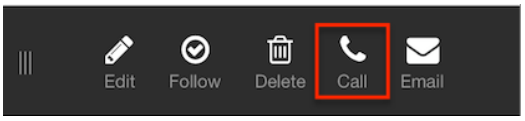

7. Tap "Save" at the top of the screen to finish creating the call. Tap "Cancel" to prevent creating the call.

Once the call or meeting has been created, you may remove attendees or add additional attendees via the related record subpanels.

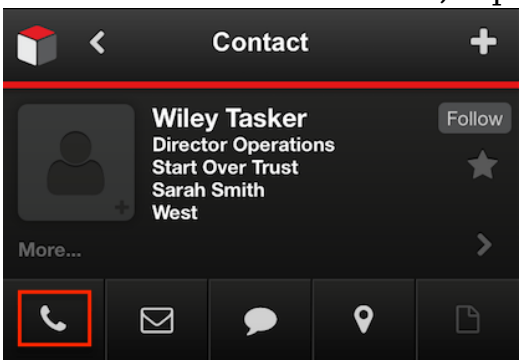
## Calling Records

Records with a populated phone number field may be called directly from the mobile browser. Once the call icon is selected, your device' native call application will open. The call can be initiated from a list of records such as from the Contacts list view or from a recently modified account on the Home page. A call can also be made from a record's detail view. In either case, you will tap the Call icon which will be visible if one of the record's phone number-type fields has a value.

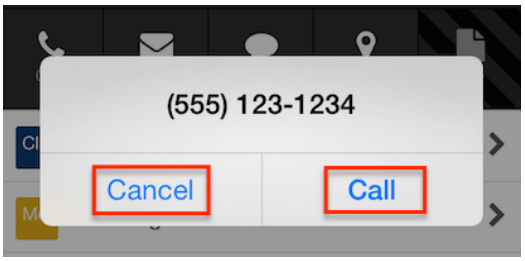
From a record list, tap the grip icon on any record's row to the left and tap the Call icon.



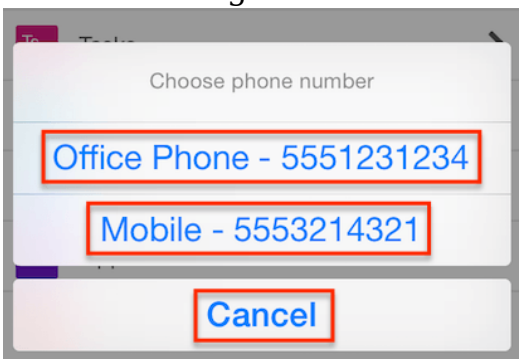

From a record's detail view, tap the Call icon.




If only one phone number is available, a pop-up will appear showing the number. Tap "Call" to place the call or "Cancel" to return to the previous page without making the call.



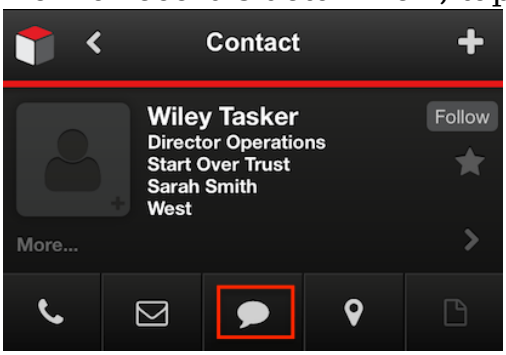

If more than one phone number is available for the record, you will have the option to choose which to call, or you may tap "Cancel" to return to the previous page without making a call.



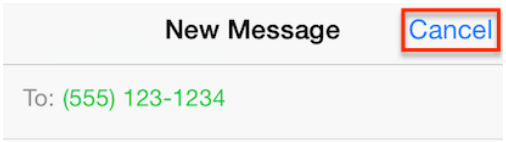

## Text Messaging Records

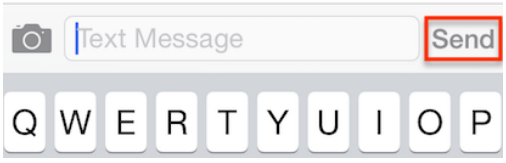
Records with a populated phone number field may be text messaged directly from within the mobile browser. The SMS can be initiated from a records detail view. Users can tap the SMS icon which will be visible if one of the record's phone number-type fields has a value.

From a record's detail view, tap the SMS icon.

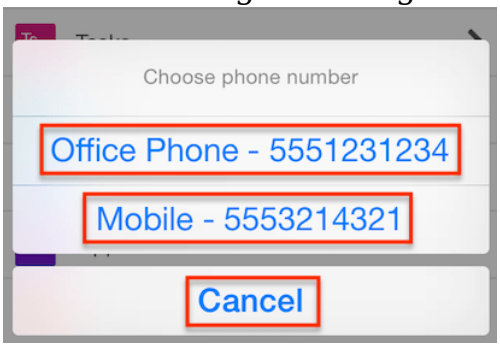



If only one phone number is available, your phone's text messaging application will appear pre-populated with the number. Type your message and tap "Send" to send the SMS or tap "Cancel" to return to the previous page without sending a message.




If more than one phone number is available for the record, you will have the option to choose which to SMS, or you may tap "Cancel" to return to the previous page without sending a message.

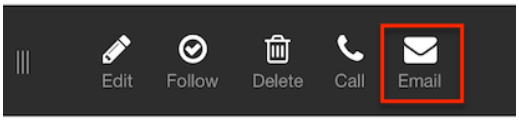



## Emailing Records

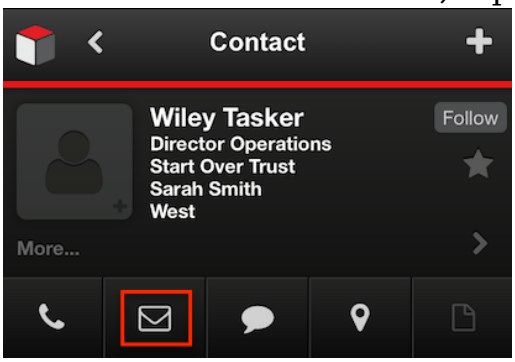
Records with a populated email field may be emailed directly from within the mobile browser. The email can be initiated from a list of records such as from the Contacts list view or from a recently modified account on the Home page. An email can also be sent from a record's detail view. In either case, you will tap the Email icon which will be visible if the record's email-type fields has a value.

Note: Only a record's primary email address is available for viewing, editing, and emailing within the mobile browser.

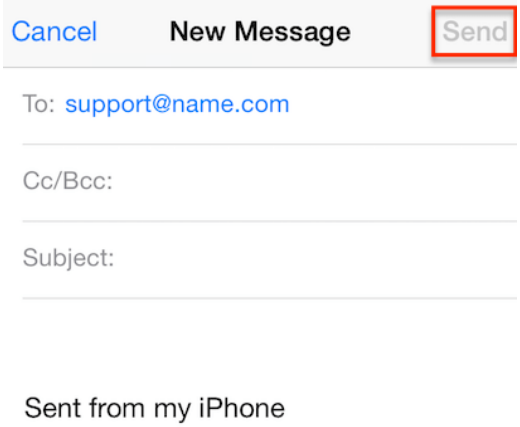
From a record list, tap the grip icon on any record's row to the left and tap the Email icon.



From a record's detail view, tap the Email icon.



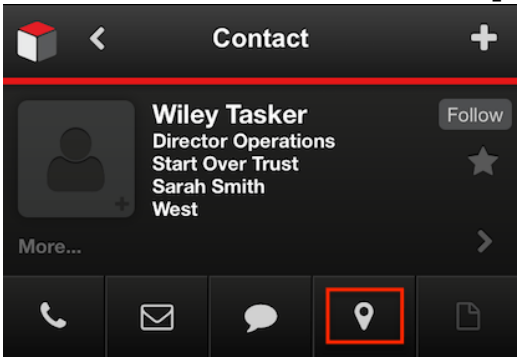

Your phone's email application will appear pre-populated with the email address. Type a subject and body, then tap "Send" to send the email or tap "Cancel" to return to the previous page without sending an email.



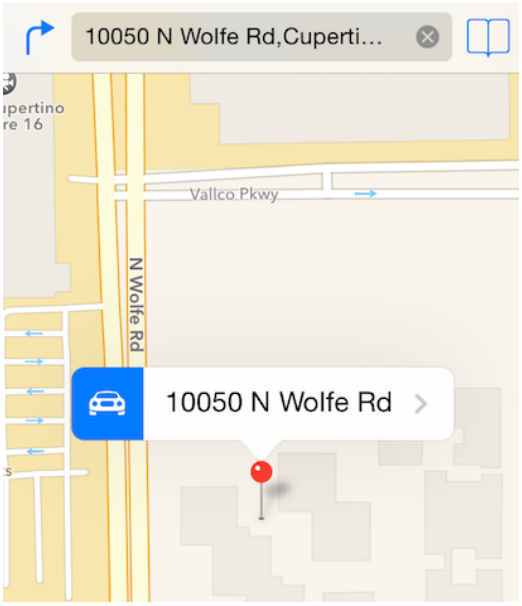

## Mapping Records

Records with a populated address field may be mapped directly from within the mobile browser. The map can be launched from a record's detail view. Users can tap the Map icon which will be visible if one of the record's address-type fields has a value.

From a record's detail view, tap the Map icon.



Your phone's map application will appear pre-populated with the address.




Similar to Calls, if more than one address is available for the record, you will have the option to choose which to map or you may tap "Cancel" to return to the previous page without mapping either address.

## Viewing Read-Only Records

The mobile browser does not allow editing of employee or report records from within the application. In place of the Edit action for these records, you will see a View action instead. Tapping the View icon will display the record's fields as configured for edit view by your administrator, but the fields will not be editable.

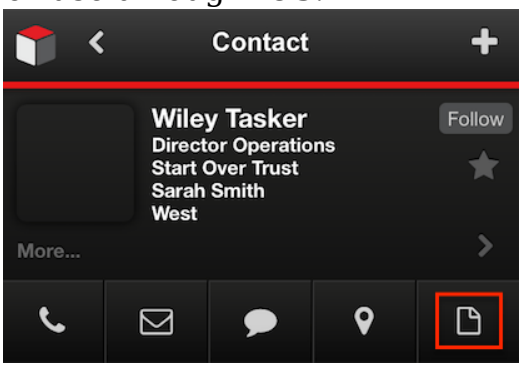



Your ability to edit records in Sugar may also be restricted by a role. For modules or records where you do not have the ability to edit because of a role, you will also see the View option in place of the Edit option. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not have the ability to edit records.

## Viewing Record Files

When a record has a populated image field or another attachment field, the File icon will be available on its record actions menu. Tap the File icon to view the image, PDF, or other type of file. The supported file types are subject to each device's capabilities, including but not limited to the following: .jpg, .tiff, .gif, .doc,

.docx, .htm, .html, .key, .numbers, .pages, .pdf, .ppt, .pptx, .txt, .rtf, .vcf, .xls, and .xlsx. Additional file types may be supported when the phone has a 3rd party application installed which supports additional types, making the file type available for use through iOS.



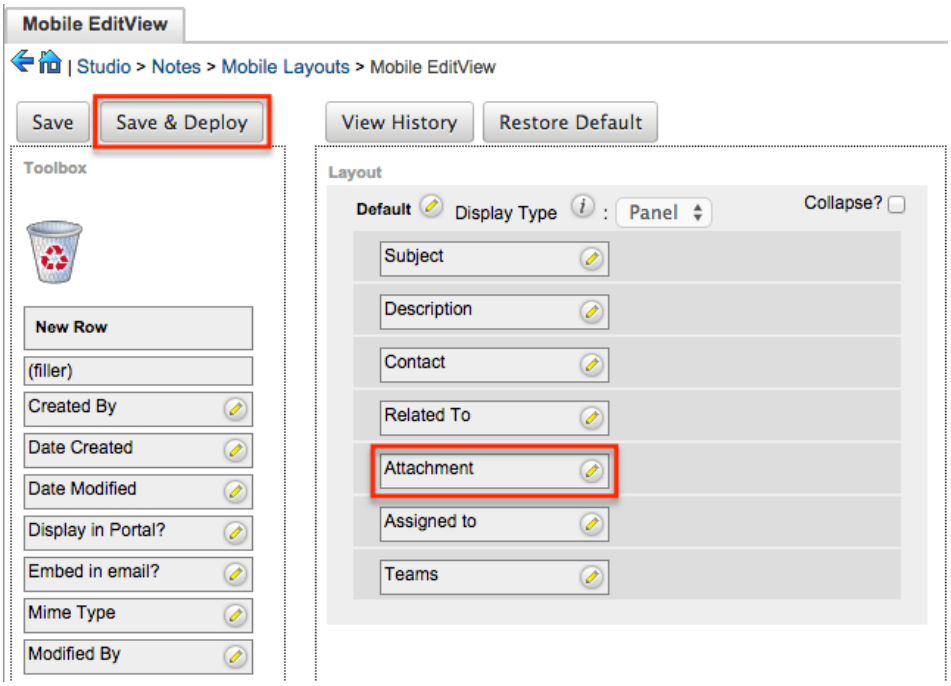

Administrator users have the ability to control what fields are available on the detail view which will affect whether the File icon appears on a record's detail view. For more information on configuring this mobile layout, refer to the Mobile Layouts section within Studio documentation in the Administration guide.

Note: The File icon may not be available from a record list when the maximum number of actions is exceeded for that record. In this situation, tap the record's name to open it in detail view where all of the valid actions will be available.

## Uploading Files

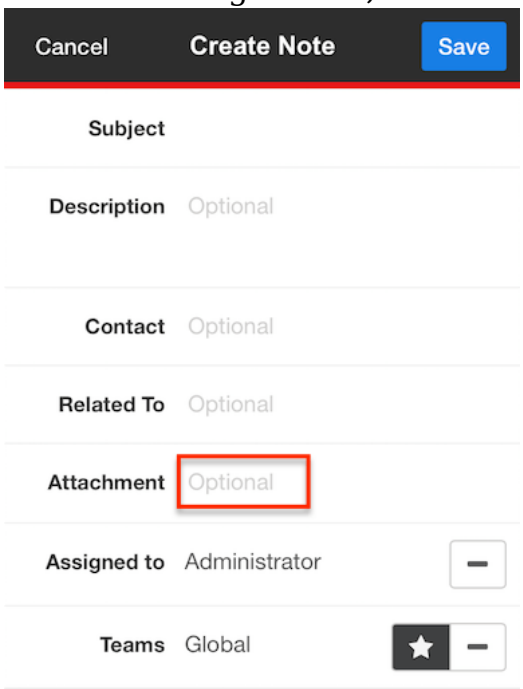
Users can only upload basic image and video files into notes and custom file records for iOS. Once uploaded, other users can download or view the attachment through the mobile app and main application.

If there is no Attachment field available in the mobile app, an admin can go to Admin > Studio > Notes > Mobile Layouts > Mobile EditView and add the Attachment field to the layout.

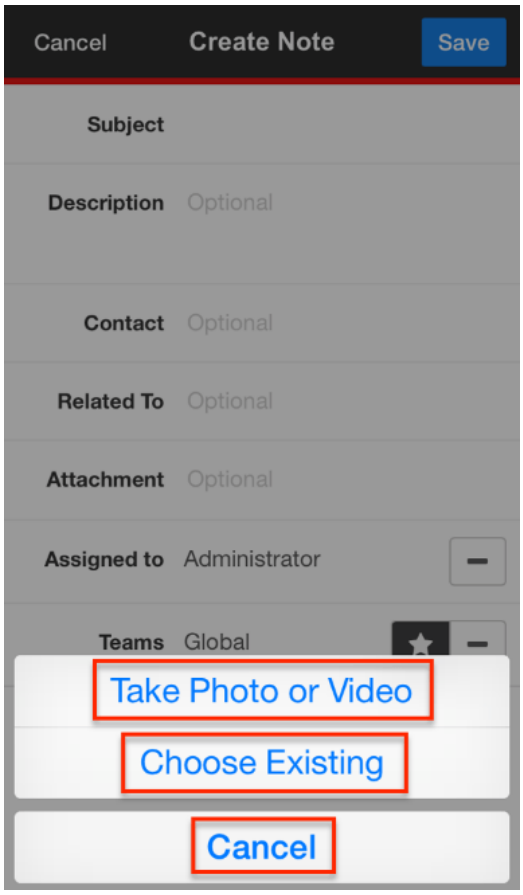



If the Attachment field is available in the mobile app, users can easily attach files to notes.

1. In the mobile browser, go to the Notes or custom module.
2. Edit an existing record, or create a new record, and tap the Attachment field.




3. Users are given an option to take a photo or video, or to choose and existing file. To back out of this screen, select "Cancel".

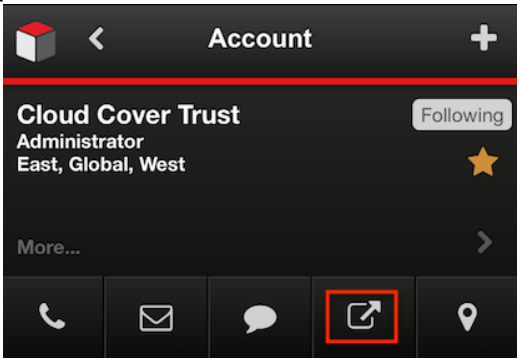



4. After selecting or taking an image or video, the file name should now be populated in the Attachment field.
5. Save the record.

Users can now View Record Files from the list view or record view.

## Visiting Record Websites

When a record has a populated website field, the Web icon will be available on its record actions menu. Tap the Web icon to open the record's website in your phone's browser.



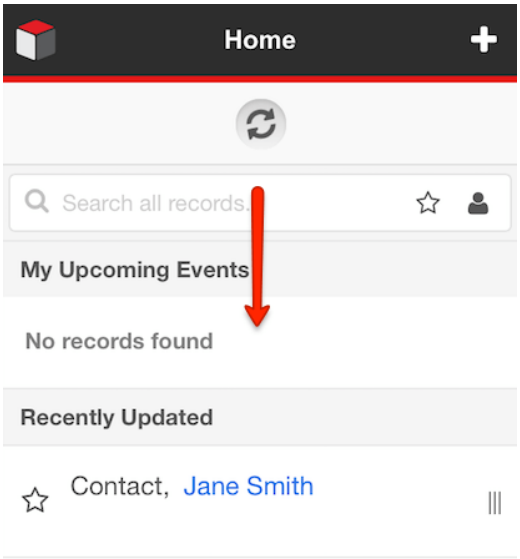

Administrator users have the ability to control what fields are available on the

detail view which will affect whether the Web icon appears on a record's detail view. For more information on configuring this mobile layout, refer to the Mobile Layouts section within Studio documentation in the Administration guide.

Note: The Web icon may not be available from a record list when the maximum number of actions is exceeded for that record. In this situation, tap the record's name to open it in detail view where all of the valid actions will be available.

## Refreshing Pages

During the course of using mobile browser, you may wish to refresh your home page, a list view, or a list of related records in order to see any updates made since you initially loaded the page. To do this, simply drag the page down until the Refresh icon appears. Releasing will cause the current list of records to be refreshed.




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