Sugar Community Edition 6.5 Application Guide

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Introduction

Overview

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

The Sugar application

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

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

The Sugar community

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

Welcome to the community!

Audience

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

Feature overview

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

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

Core features

Sales Force Automation

- Lead, Contact, and Opportunity management to pursue new business, share sales information, track deal progress, and record deal-related interactions
- Account management capabilities to provide a single view of customers across products, geographies, and status
- Sugar Dashboards to provide real-time information about leads, opportunities, and accounts

Marketing Automation

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

Customer Support

- Case management to centralize the service history of your customers and monitor how cases are handled
- Bug tracking to identify, prioritize, and resolve customer issues

Collaboration

- Activity management for emails, tasks, calls, and meetings
- Content syndication to consolidate third-party information sources

Administration

- Edit user settings, views, and layouts quickly in a single location
- Customize the application in Studio to meets the exact needs of your organization
- Create custom modules in Module Builder

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Getting Started

Overview

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

Prerequisites

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

- A web browser application on your computer. For information on the supported browsers, see Supported Platform Components for Sugar.
- JavaScript support and cookie support enabled within the web browser used to access Sugar.
- Network access to a server that is running the Sugar software.

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

Note: For detailed information on supported versions for all the Sugar components, see [Downloading and installing Sugar](#).

Web browser window controls

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

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

Accessing Sugar and setting your User Preferences

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

Troubleshooting tips

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

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

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

Available languages

The default language in Sugar is US English. Administrators can install additional languages if necessary. Language packs are available at http://www.sugarforge.org.

Configuring User Preferences

Follow the steps listed below to access Sugar and configure your User Preferences:

1. Enter the Sugar URL in the address bar of your web browser.
   This displays the Sugar Log In page with fields to enter your Sugar credentials. The Sugar Log In page also displays a Language drop-down field from which you can select the language that you want to display in Sugar. For information on using the Admin Wizard that displays when you login as an administrator, see Configuring Settings in Sugar.
2. Enter your username and password.
3. Click Log In.
   This displays the User Wizard if you are a regular user. The Sugar User Wizard guides you through the process of entering your Profile information and Locale settings in Sugar. You can change your profile information and locale settings in the Wizard if the administrator has already configured these settings for you. You can also change them from the User Preferences page after you log into Sugar.
   The administrator also configures a default SMTP email server to send out email notifications and alerts. An Email Settings tab displays in the Wizard if the administrator has enabled users to use this email server for outgoing emails. Specify your username and password in the Email Settings tab to send out emails from that email server.
   For information on user preferences, see Editing your User Preferences.
4. Click Next to navigate from one page to the next; make the desired changes to your settings, and click Finish to exit the wizard.
   This displays your Sugar Home page. You can now begin using the Sugar application. For information on using your Home page, see Home Module .

User session rules

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

- You cannot log into a Sugar instance simultaneously using the same account from two different machines or browsers.
- Two different users cannot log into a Sugar instance separately with two

simultaneous sessions using the same username. When you are logged into a Sugar instance, if another person logs in using your credentials, you will be automatically logged out. Hence, to avoid conflict, it is recommended that you do not share your credentials with other users.

Sugar enables you to do the following:

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

Editing your User Preferences

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

User Profile

This tab displays your profile information such as your full name, your Sugar username, phone number, address, title, and email address.

Employee Information

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

Email Settings

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

You can send emails automatically if the administrator has setup an SMTP server

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

Password

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

Advanced

The Advanced tab displays the following sections:

User Settings

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

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

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

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

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

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

Accounts

Contacts

Opportunities

Leads

Meetings

Calls

Tasks

Cases

Bugs

Quotas

Campaigns

Projects

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

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

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

Layout Options

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

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

Edit Tabs. Enables you to hide modules that you do not require. Move the module from the Display Tabs list to the Hide Tabs list using the right arrow to hide the module. Use the left arrow to move a module name from the Hide Tabs list to the

Display Tabs list to display the module. These settings can be applied globally by the administrator.

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

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

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

Locale Settings

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

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

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

Time Zone. Set your time zone.

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

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

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

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

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

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

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

First Day of the Week. Specify the first day of the week that displays in Week, Month, and Year Views.

Calendar Options

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

External Accounts

The following Connectors are available in Sugar:

- LinkedIn — View your LinkedIn contacts at a specific company (Sugar matches the company name in a Sugar field)
- InsideView — View key sales intelligence directly in Lead, Account, Contact and Opportunity records, and get relevant company information, contacts, news, and social media insights within Sugar

You can access your LinkedIn records within Sugar if you have an existing LinkedIn account.

Note: You do not need to have an InsideView account. InsideView identifies user accounts by their email addresses. If you have an existing account with InsideView, you are immediately connected to the their service. You can use their free trial version if you do not have an account with InsideView. For more information, see Accessing InsideView.

LinkedIn and InsideView are enabled by default in all upgrades and new installs. Request your administrator to disable InsideView, if your organization does not want to use it.

Access

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

Roles

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

Downloads

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

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

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

Editing Email Settings

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

Follow the steps listed below to change your email settings:

1. Click your name on the top right corner of the Sugar page.
   This displays the Users module.
2. Scroll down to the Email Settings sub-panel on the User Profile tab.
3. Overwrite existing email address with new email address and click Save to change an existing email address.
   Click the plus (+) sign, populate new field, and click Save to add another email address.
   You can add multiple email addresses. The first email address that you enter is selected as the primary email address by default. Click the Primary button corresponding to the email address that you want to specify as the new primary address to select a different email address as the primary address.
   Select the Reply-to radio button corresponding to the email address that you want to specify as the new reply-to address to specify a different email

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

Managing your password

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

Changing your password

Follow the steps listed below to change your password:

1. Log into Sugar and click your name on the top right corner of any Sugar page. This displays the Edit User page.
2. Click the Password tab.
   If there are password rules, they will display in this section. Your new password must adhere to these rules. Each rule will be marked with a red cross. When you enter your password, as each rule is met, the cross will be replaced with a green checkmark. You can save your new password only after all the rules have checkmarks.
3. Input current and new passwords in the relevant fields and click Save.

Resetting a forgotten password

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

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

1. Click the Forgot Password? link in the Sugar Log In window.
2. Input relevant information in the User Name and Email Address fields and click Submit.
   This displays a message confirming that your request has been submitted.
   You will also receive an email with a link to access the Password Reset page.
   Populate fields with required information and click Save.

Contact your system administrator for a temporary password if you do not see the

Security timeout

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

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

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

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

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User Interface

Overview

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

Application navigation

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

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

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

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

Common Module options

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

•	Quick Create forms. You can access these forms from the sub-panel of a related record that displays in a record's Detail View. For example, you can create a contact from the Contacts sub-panel of an account's Detail View. Administrators can add, remove, and move fields to customize the Quick Create forms.

•	Global Search field. This field, located in the top right corner of any Sugar page, enables users to enter a letter or a keyword to search all the modules for matching records. For more information, see Global Search.

•	System links. System links, located at

	the top right-hand corner of any Sugar page, are common to all modules. These include your , Logout, Employees, Support, Help, and About. When an administrator logs in, the Admin link is also visible.

	Your Name. Click this link, located at the top right of the page, to view your settings. These settings include your profile information, layout options, and so on. For more information, see Editing your User Preferences.

	Employees. Click this link to view a list of other employees in your organization. This list, maintained by the administrator, displays information such as name, title, phone number, department, and email address. Click a name to view detailed information about the employee. Every user is listed as an employee. However, every employee may not be a Sugar user. For more information, see Employees Module.

	Admin. This link displays only if you login as the administrator. Click this link to access the Administration Home page to perform administrative tasks. For more information, see Administering Sugar.

	Support. Click this link to view the Sugar Support page, which provides links to Sugar documentation, Knowledge Base, FAQs, and training courses to guide you through the process of learning the Sugar application.

	Help. This is a context-aware link to the Application Guide. For example, if you click on the Help link in the Contacts

	module, you will be directed to the Contacts section of the Application Guide.

	About. Click this link to learn more about SugarCRM and view version information. This link also provides credits and source code references.

•	Shortcuts menu. This menu lists options to perform actions such as creating and viewing records, and the last viewed record(s).

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

Sugar Modules

The core Sugar modules are as follows:

•	Home. The Home module provides a quick view of your activities and assigned records in the form of Sugar Dashlets. For more information on this module, see Home Module. For more information on Dashlets, see Managing Sugar Dashlets.

•	Accounts. Click this tab to view the Accounts module. Use this module to manage your customers. You can track information about an account, including website, address, number of employees and other data. You can link business subsidiaries to the parent organization to show relationships between accounts. For more information on creating

	accounts, see Accounts Module.

•	Contacts. Click this tab to view the Contacts module. Use this module to track people involved in doing business with your organization. You can track contact information such as title, email address, and phone number. Contacts are usually linked to an account. For more information, see Contacts Module.

•	Opportunities. Click this tab to view the

•	Calendar. Click this tab to view the Calendar module. Use this module to view scheduled activities (by day, week, month, or year) such as meetings, tasks, and calls. You can also share your calendar with your coworkers to coordinate your daily activities. For more information, see Calendar Module

•	Calls.Click this tab to view the Calls module. Use this module to manage outbound and incoming phone calls between you and your customers. For more information, see Calls Module.

•	Meetings. Click this tab to view the Meetings module. Use this module to manage meetings, including both internal and external invitees, that you schedule or accept. For more information, see Meetings Module.

•	Emails. Click this tab to view the Emails

•	Tasks. Click this tab to view the Tasks module. Use this module to manage a list of actions that you need to complete by a specific date. For more information, see Tasks Module.

•	Notes. Click this tab to view the Notes module. Use this module to manage notes and file attachments. For more information, see Notes Module.

•	Documents. Click this tab to view the Documents module. Use this module to view a list of documents that you can download. You can also upload your own documents, assign publication and expiration dates, and specify the users who can access them. For more information, see Documents Module.

•	Leads. Click this tab to view the Leads module. Use this module to track individuals or companies that are potential customers. When you choose fields in the Web to Leads form in Sugar from the fields in the Leads module, Sugar generates the HTML code to display the form and the code to connect entered field values to the fields in the Leads module. For more information, see Leads Module.

•	Targets. Click this tab to view the Targets module. Use this module to track and manage targets. For more information seeTargets Module .

•	Target Lists. Click this tab to view the Target Lists module. Use this module to

•	Campaigns. Click this tab to view the Campaigns module. Use this module to create and manage marketing campaigns. You can implement and track telemarketing, mail, or email-based marketing campaigns. For more information, see Campaigns Module.

•	Cases. Click this tab to view the Cases module. Use this module to help Customer Support manage product problems and inquiries by tracking information for each case such as its status and priority, the user assigned, as well as track related open and completed activities. For more information, see Cases Module.

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

•	Projects. Click this tab to view the Projects module. Use this module to track and manage tasks for multiple projects. Tasks can be assigned to different users and assigned estimated hours of effort. You can update information as tasks progress or are completed. For more information, see Projects Module.

•	Bug Tracker. Click this tab to view the Bug Tracker module. Use this module to report and track bugs associated with a product. Customer support representatives can manage software-related support problems or inquiries to completion by tracking information for each bug such as its status and priority, resolution, assigned user, release of software involved, type (defect or feature) as well as track related activities. For more information, see Bug Tracker Module.

Grouped Modules

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

•	Sales - Home, Accounts, Contacts,

	Opportunities, and Leads

•	Marketing - Home, Accounts, Contacts, Leads, Campaigns, Targets, and Target Lists

•	Support - Home, Accounts, Contacts, Cases, and Bug Tracker

•	Activities - Home, Calendar, Calls, Meetings, Emails, Tasks, and Notes

•	Collaboration - Home, Emails, and Documents

To view individual module tabs

1.	Mouse over the All tab located next to the grouped module tabs.

2.	Select the individual module tab listed under the All tab.

3.	Click the double right arrows >> located under the All tab to the right of all the modules to view more modules.

4.	Select the individual module you want to view.

Viewing and managing record information

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

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

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

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

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

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

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

To view and edit a record

1.	Click a record name in a module's List View, to see its Detail View.

2.	Click Edit in the record's Detail View to edit the record.

3.	Input the required information and click Save.

Click Cancel to exit the Edit View without saving your changes.
To manage related information in sub-panels
The Detail View of a record displays related information in sub-panels. Each sub-panel consists of rows to list links to records. You can add more records to the list, if necessary. This feature enables you to quickly associate multiple records. For example, you can associate more than one contact with an account.

•	To minimize a sub-panel, click the arrow located to the left of a sub-panel's name. This hides the sub-panel, but still displays its name and the arrow icon. Click the arrow icon to display the

	sub-panel.

	To move a sub-panel to a different location on the page, mouse over the sub-panel name, click and drag the panel to the desired location on the page.

	To create a new record, click Create below the sub-panel name. This displays the the Quick Create form. Input required information and click Save. Click Full Form to include additional details and click Save.

	To choose a record from an existing list, click Select above the sub-panel.

A list of available records for the sub-panel displays in a separate window.

	To select one or more records from the list, click the box adjacent to the record

	To delete a related record, click the rem

Tracking User Activity

The Last Viewed bar displays recently accessed records, as well as calls and meetings you recently scheduled.

Creating and Managing Records

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

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

Assigning Records to Users

When you create a record, by default, you are the user assigned to manage it. You can change the user assignment if required. When a record is assigned to a user, Sugar sends an email notifying the user. You can view the assigned user from the record's Detail View and Edit View.

To assign users to records

1.	Select the module in which you want to create a record.

2.	Select Create from the Actions bar on any page within the module. For example, to create a record in the Accounts module, choose Create Account.

Or
Click the Create icon located on the top right of any page within the module.

3.	Enter the record name.

Sugar automatically assigns this record to you.

4.	To change the assigned user, enter the user's name, or click the Select button to select it from the Users list; if you do not want to assign a user, click the Clearbutton to remove the existing user name from the field.

5.	Click Save to save the record.

To manage record assignments

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

This displays the Detail View of the record.

2.	Click Edit in the Detail View.

This displays the Edit View of the record.

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

4.	Click Save.

Tracking and managing record History

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

To track and manage record history

1.	To view the details of a listed note, meeting, attachment, or email, click its title.

2.	To sort records in ascending or descending by date, click the Up or Down arrow located next to the Due Date column.

3.	To add a note or to attach a file, click Create Note or Attachment. For more information, see Creating Notes and Attachments.

4.	To archive an email, click Archive Email

5.	To view a summary of all the listed records, such as subject, status, and date, in a separate window, click View Summary.

6.	To edit or delete a record, click the appropriate edit or rem icon respectively.

Editing and Deleting Multiple Records

Most of the modules provide a Mass Update sub-panel on their home page that enables you to edit or delete one or more of the listed records simultaneously. This

feature is useful to update information shared by several records such as the assigned user. The fields that you can edit vary depending on the module. For example, in the Contacts module you can change the related account.

To edit or delete multiple records

1.	To edit information, in the module's List View, select the records that you want to edit.

2.	From the Actions drop-down list, select Mass Update to view the Mass Update sub-panel.

3.	Make your changes and click Update.

To reassign the record to a different user, click Select to choose a new user from the Users list. Other fields that display in this panel vary depending on the module.

4.	Click Update to save your changes.

The selected records are updated.

Integrating data from external sources

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

Typically, you use the import functionality to add a large volume of data from an external system. You can also use Connectors to view and add data to a Sugar record from third party data providers.

This section discusses the following Connectors: LinkedIn and InsideView.

Integrating data through a Connector

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

1.	Navigate to the record's Detail View.

If the system administrator has enabled the LinkedIn Connector for the module, Sugar displays its symbol next to the account name.

2.	Point the cursor at the LinkedIn symbol

	in the Sugar record, and from the pop-up window, select the connection that you want to view.

Accessing InsideView

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

•	Accounts

•	Contacts

•	Leads

•	Opportunities

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

1.	Go to a module that has been enabled for InsideView access.

2.	Select a record from the module's List View page.

This displays the record's Detail View page.

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

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

4.	Read the terms of use and privacy policy

5.	Click Get Started.

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

You can narrow down search results by adding the Company name in the search field provided in the InsideView panel.

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

Managing Sugar Dashlets

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

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

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

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

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

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

To add Sugar Dashlets

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

This displays the Add menu in a separate window.

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

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

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

You can add a chart Dashlet to your Home page or to the Dashboard. The Charts tab displays pre-defined report charts under Basic Charts.

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

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

This displays the Dashlet on your Home page.

To edit Sugar Dashlets

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

This displays the : Options pop-up window. You can change the Dashlet's title, the number of rows that it displays, and the fields that display as columns. You can also filter records that you want to view in the Dashlet, based on the subject, assigned user, due date, and so on. Click Save after you have made the desired changes to the Dashlet settings.

2.	To sort a Dashlet by a column such as user name or start date, click the column name on the Home page.

To manage Sugar Dashlets

1.	To move a Sugar Dashlet, click anywhere on its title and drag and drop the Dashlet to its new location.

2.	To remove a Sugar Dashlet, mouse over the title bar, click the Delete icon and then then click OK in the delete confirmation pop-up box.

3.	To manually refresh a Sugar Dashlet, mouse over the title bar, and click the Refresh icon.

My Activity Stream

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

My Activity Stream also enables you to post your status along with external links, images, and YouTube videos.

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

To add a My Activity Stream Dashlet

1.	Click Add Sugar Dashlets on your Home

This displays the Add pop-up window.

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

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

3.	To post an external link, image, or YouTube video in the My Activity Stream Dashlet, select Link, YouTube, or Image from the drop-down list under

	your name; enter the URL or path in the field displayed and Click Post.

This displays the posted information on the Home page for all users. When you perform an action such as creating a contact or converting a lead, the information automatically displays in the My Activity Stream Dashlet.

Merging Duplicate Records

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

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

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

To merge duplicate records from the List View

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

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

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

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

This moves the record to the left column.

3.	Click the

4.	Click Save Merge.

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

To merge duplicates from the Detail View

1.	Click a record in the List View to navigate to its Detail View.

2.	Click Find Duplicates.

This displays the Find Search Records to Merge With page.

3.	Set filters in the Find Search Records to Merge With page to specify the field that you want to search for. For example, you can search for records that have the same billing address or phone number.

4.	Select one or more filters and click Next Step; Click the Trash icon located next to the field name to remove a filter.

This displays the Records Found To Merge With page.

5.	Select the records that you want to merge and click Perform Merge.

This displays the Merge Records page.

6.	Merge records as described in To merge duplicate records from the List View.

Searching for Information in Sugar

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

- Global Search

- [Basic Search](#)
- [Advanced Search](#)

Global Search

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

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

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

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

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

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

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

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

To add or remove modules from Global Search

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

This displays a page with the message: There were no results found. Please search again.

2.	Click the Advanced link next to the Search button on this page.

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

Basic Search

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

•	To perform a basic search, enter the record name, or the first letter of the name in the Search field and click Search. When searching for contacts, you can enter the first name, last name, or full name.

•	To find only records assigned to you, select My items, and then click Search.

•	Click Clear to clear the search filters.

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

Advanced Search

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

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

character.

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

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

Saving Search Criteria and Layout

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

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

To save and manage search criteria

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

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

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

| 3. | Select the saved search from the drop-down list, change the criteria as needed in the fields above, and click Update to modify a saved search. |

| 4. | Select a saved search in the Saved Searches drop-down list, click Delete, and OK to delete a saved search. |

| 5. | Select a cloumn from the Hide Columns |

6.	Select a column from the Display Columns list and use the right arrow to move it to the Hide Columns list to remove a column from List View.

7.	Use the Mass Update sub-panel to edit or delete multiple records in the search results. For more information, see To edit or delete multiple records.

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Home

Overview

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

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

Home page tabs

The Home module displays the following tabs:

•	My Calls. Lists phone calls set up by you or includes you, including the subject of the call, the duration, and the start date.

•	My Meetings. Lists invitations to meetings set up by you or others including the subject of the call, the duration, and the start date.

	My Leads. Displays a list of leads that you created, including the name, business phone number, and date created.

	My Top Open Opportunities. Lists the top five opportunities sorted by the amount. Opportunities with a status of Closed-Lost or Closed-Won are not included. You can display up to ten opportunities in this Dashlet.

	My Accounts. Displays accounts assigned to you, including the account and phone numbers.

	My Open Cases. Displays a list of customer issues assigned to you for resolution, including the case number, subject, priority, and status.

	My Activity Stream. Notifies you when other users create a new contact, lead, opportunity, or case. You can also view Twitter and FaceBook feeds of your friends in this Dashlet.

	My Emails. Lists your unread emails that were imported into Sugar from external email accounts.

Viewing and managing predefined charts

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

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

You can edit predefined charts to suit your requirements, but you cannot delete

them. Click the Edit icon to modify a chart. Click the Refresh icon to refresh the view after an update. Click the Refresh icon above the chart to recalculate the data source for a specific chart.

The following predefined charts are displayed on your Home page:

•	All Opportunities by Lead Source by Outcome. This is a horizontal stacked bar chart that displays total opportunities for each lead source. Each bar is made up of multi-colored segments that represent the outcome proportions for that lead source.

•	All Opportunities by Lead Source. This is a pie chart that groups total sales opportunities by each lead source.

•	Campaign ROI. This is a bar chart that displays the return on investment (ROI) for a campaign.

•	Pipeline By Sales Stage. This is a horizontal bar chart that displays the total dollar amounts for all your opportunities grouped by sales stage.

•	Outcome by Month. This is a vertical stacked bar chart in which each bar displays the total sales pipeline for each month. Each bar is made up of multi-colored segments that represent the outcome proportions for the pipeline in that month.

Modifying the Home module

You can add Sugar Dashlets to your Home page as described in Managing Sugar Dashlets. You can revert to the default Home page setting at any time. This will delete any new Sugar Dashlets that you added to the Home module.

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

To revert to default Home page settings

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

This displays your Edit user page.

2.	Click ResetHomepage, and OK in your Edit user page.

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Leads

Overview

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

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

Creating Leads

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

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

To create a lead

1.	Select Create Leads from the Actions bar.

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

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

First Name. Enter the lead's first name.

Last Name. Enter the lead's last name.

Title. Enter the business title of the lead.

Department. Enter the department to which the lead belongs.

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

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

Mobile. Enter the lead's mobile phone number.

Fax. Enter the lead's fax number.

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

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

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

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

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

Description: Enter a brief description for the lead.

Enter the following details in the More Information section:

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

l	New: Unassigned, new lead.

l	Assigned: Newly assigned to user.

l	In Process: Currently active.

l	Converted: The status appears as converted after the Convert Lead link has been selected. The system automatically changes the status in this field.

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

l	Recycled: No opportunity at this time, lead should recycle to marketing for

	future follow-up.

l	Dead: No opportunity and/or bad data.

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

Opportunity Amount. Estimated amount of the sale.

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

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

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

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

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

Specify the following information in the Other section:

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

3.	Click Save.

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

Managing Lead Information

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

To manage leads

•	Use the Search sub-panel on the Leads Home page to search for a lead. For more information, see Searching for Information in Sugar.

•	Follow the steps listed below to add one or more leads to a campaign Target List:

a.	Select one or more leads in the Leads List View.

b.	Click Add To Target List from the

	Actions drop-down list.

This opens the Target Lists Search page.

c.	Select the Target List from the Target Lists Search page.

•	For information on how to import and export leads through vCards, see Using vCards to Import and Export Contacts.

•	Select the data source from the lead's Detail View to pull in data from external data sources such as LinkedIn. For more information on data sources, see Integrating data from external sources.

•	Select Import from the Actions drop-down list to import records. For more information on importing data, see Importing Data. For information on how to import Leads from vCards, see Using vCards to Import and Export Contacts.

•	Select records from the List View, click the Export link from the Actions drop-down list to to export records. For more information, see Exporting Data.

•	Select duplicate records from the List View, click the Merge Duplicates link to merge duplicate records. For more information see To merge duplicate records from the List View.

•	Click the View Change Log link in the Detail View of a Lead record to track changes in the lead information over time.

•	Select multiple records in the Leads List View, click the Mass Update link in the

•	Click on the lead name in the List View to display the Detail View of that lead record. The follow tasks can be performed from the Detail View page:

	Click Edit to modify the record.

	Click Manage Subscriptions to manage newsletter subscriptions.

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

Drag the newsletter from the Newsletters Subscribed to list to the Available Newsletters list to add the individual to a newsletter subscription mailing list, Click Saveto update the information.

	Click Duplicate to duplicate a lead, on the detail page. This is a convenient way of creating a similar lead. You can change the information in the duplicate record to create the new lead.

	Cick Delete to delete a lead.

	For more information on how to view and edit related information in a sub-panel, see To manage related information in sub-panels.

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

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

b.	Click Archive Email.

This displays the Create Archived Emails form.

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

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

Converting Leads

Sugar enables you to convert leads into Contacts, Opportunities, and Accounts after you have evaluated and qualified them. Based on your lead-conversion options, set by your Sugar administrator, you can do any one of the following with lead-related activities (Tasks, Calls, Meetings, Notes, and Emails) during conversion:

•	Create and relate copies of all of the Lead's activities to new records that you have selected. Copies are created for each of the selected records.

•	Move all of the Lead's activities to a new record that you have selected.

•	Do nothing - The activities remain related to the converted Lead.

To convert a lead

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

This displays the Convert Lead page.
The Create Account checkbox is pre-selected by the system to create a new account for the lead. You can also create other related records such as a note, task, and opportunity if the administrator has enabled you to do so.

2.	Click the select arrow next to the Select Account fields to choose an account from the Accounts list and associate the lead with an existing account.

3.	Select the appropriate checkbox to create a note, appointment, or opportunity.

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

4.	Select a module from the Move Activities to or Copy ActivitiesTo drop-down list.

Note that the drop-down list changes based on your selections on the Convert Lead page. For example, if you have selected Create Opportunity, values displayed in the Move Activities to or Copy ActivitiesTodrop-down list are: Contact, Account, Opportunity.
The Move Activities to or Copy ActivitiesTo field is missing if your Sugar administrator has selected Do Nothing for Lead-related activities.

5.	Populate the mandatory and other fields and click Save.

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

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Contacts

Overview

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

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

Contact actions

The Actions bar on the Contacts tab displays the following options:

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

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

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

Import Contacts. Click this option to import contact information from an external application or file. For more information on importing, please refer to the [Import](#) documentation.

Creating Contacts

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

To create a contact

1.	Select Create Contact from the Actions bar on the Contacts tab.

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

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

First Name. Enter the contact's first name.
Last Name. Enter the contact's last name.
Title. Enter the contact's business title.
Office Phone. Enter the contact's office phone number.
Mobile. Enter the contact's mobile phone number.
Fax. Enter the contact's fax number.
Account Name. Enter the account name associated with the contact; or click Select
Address: Enter the Primary Address and Other Address information. Select Copy address from left box to copy the Primary Address into the Other Address section. If you select a contact from the Contact's list, the system automatically enters the address. You can edit this information if required. Similarly, if the contact is related to an account, Sugar automatically auto-fills this field with the account's primary address.
Email Address: Enter the email address for the organization and your contacts and campaign targets within the organization. Select Invalid to indicate an incorrect email address. If you sent out campaign emails this contact and the individual chose to opt-out of receiving them, select Opted Out.
To add an additional email address, click the Add icon. You can add multiple email addresses.
Description: Enter a brief description for the contact.

Enter the following details in the More Information section:

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

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

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

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

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

Specify the following information in the Other section:

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

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

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

Managing Contacts

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

To manage Contacts

| • | To edit or delete information related to multiple contacts, select multiple records in the Contacts list view and click the Mass Update link in the Actions dropdown list. For more information on mass updating records, please refer to the <u>Editing and Deleting Multiple Records</u> section of the User Interface documentation. |

| • | To add one or more contacts to a campaign target list, select them in the Contacts List View and click Add to Target List to select the list from the Target Lists pop-up window. |

| • | To display the Detail View for a contact, |

	click on the contact name in the List View.

•	To edit contact information, click Edit in the Contact's Detail View.

•	To archive a related email, scroll down to the History sub-panel in the Detail View where related emails are listed and click Archive Email. This displaysthe Create Archived Email form. Copy-paste information related to the email into this form to save it for your records.

•	To pull in account data from data sources such as LinkedIn, select the data source from the contact's detail view. For more information on integrating with external data sources, please refer to the [User Interface](#) documentation.

•	To import records, select "Import" from the Actions bar list of the Contacts tab. For more information on importing, please refer to the [Import](#) documentation.

•	To export records, select the records from the Contacts list view then click " Export" from the Actions bar list. For more information on exporting, please refer to the [Export](#) documentation.

•	To merge duplicates, select the records from the Contacts list view then click " Merge" from the Actions bar list. For more information on merging records, please refer to the [Merging Duplicate Records](#) section of the User Interface documentation.

•	To manage newsletter subscriptions, click Manage Subscriptions on the Contact Detail View. To add the individual to a newsletter subscription mailing list, select the newsletter from the Available/NewsLetters Unsubscribed to list and drag it to the NewsLetters Subscribed To list. To remove the individual from the mailing list of a newsletter, drag the newsletter from the Newsletters Subscribed tolist to the Available/NewsLetters Unsubscribed to

•	To duplicate contact information, click Duplicate in the Contact Detail View.

Duplication is a convenient way of creating a similar contact. You can change the information in the duplicate record to create a new contact.

•	To track changes made to contact information over time, click the View Change Log link located in the detail view.

•	For more information on managing related records via subpanels, please refer to the User Interface documentation.

Using vCards to Import and Export Contacts

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

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

To import a vCard

1.	Select Create from vCard from the

	Actions bar of the Contacts module tab.

This displays the Import vCard page.

2.	Click Browse to navigate to the vCard location on the local file system.

3.	Select the file from your local machine and click Import vCard.

This displays the Detail View page of the created contact.

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

To edit or to save a vCard to a different location

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

This displays a dialog box prompting you to open or save the file.

2.	To edit the vCard and save it in your Contacts folder in Outlook, open the file, make the necessary changes and click Save; to save the vCard on your local machine, select Save As.

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Accounts

Overview

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

An Account contains your customer information such as name and address. Each Account can be associated with other records such as Opportunities and Contacts.

Account actions

The Actions bar on the Accounts tab displays the following options:

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

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

Import. Click this option to import Account information from external systems and data sources. For more information, see Importing Data.

Creating Accounts

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

To create an Account

1.	Select Create Account from the Actions bar on the Accounts tab.

Or, click the Create Account icon in the Shortcuts Bar, and add additional information after you save the form.
Or, click the Create icon on any page within the Accounts module.

2.	Enter the following information in the Account Overview section:

Account Name. Enter a name for the account.
Website. Enter the URL for the organization's website.
Office Phone. Enter the office phone number.
Fax. Enter the fax number for the organization.
Address. Enter the billing and shipping addresses. To copy the Billing Address to the Shipping Address section, select the Copy address from left checkbox.
Email Address: Enter the primary email address for the account. To add additional email addresses for your contacts and campaign targets within the organization, click the Add icon. To indicate the primary email address, select Primary. If you sent campaign emails to this contact and the individual chose to opt-out of receiving them, select Opted Out. If the email is incorrect, select Invalid.
Description: Enter a brief description for the lead.
Enter the following information in the More Information section:
Type. Enter the account category such as Customer or Partner.
Annual Revenue. Enter the annual revenue for the organization.
SIC Code. Enter the Standard Industrial Classification code that indicates your organization's type of business.
Member of. Enter the names of organizations associated with the account.
Campaign. To target the account for a marketing campaign, click Select and choose an existing campaign.

Industry. From this drop-down list, select the industrial sector to which the account belongs.
Employees. Enter the number of employees in the organization.
Ticker Symbol. Enter the stock ticker symbol for the organization.
Ownership. Specify the owner information.
Rating. Enter the organization's rating in the industry.
Specify the following information in the Other section:
Assigned to. Enter the name of the individual you want to assign to the account or click Select to choose from the User List. By default, this record is assigned to you.

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

Managing Accounts

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

To view and manage Accounts

•	To sort the Accounts List View, click any column title which has the ▦icon beside it; to reverse the sort order, click the column title again.

•	To edit or delete information related to multiple accounts, select multiple records in the Accounts List View and click the Mass Update link in the Actions drop-down list. For more information, see To edit or delete multiple records.

•	To import records, select Import Accounts from the Actions bar on the Accounts tab. For more information on importing data, see Importing Data.

•	To export records, select the records from the Accounts List View, click the Export link in the Actions drop-down list and follow the process described in Exporting Data.

•	To add one or more accounts to a campaign target list, select them in the List View, click Add to Target List in the Actions drop-down list, and select the list from the TargetListspop-up box.

•	To view account information, click the record's name in the List View. This displays sub-panels for related records such as Activities, History, Contacts, Opportunities, and Leads on the Detail View. You can create new records or edit existing ones.

•	To edit an account, click Edit on the Detail View page, make the necessary changes, and click Save.

•	To pull in data from data sources such as Google, select the data source from the account's Detail View. For more information on data services, see Integrating data from external sources.

•	To merge duplicates, select the records from the Accounts List View, click the Merge link in the Actions drop-down list, and follow the process described in

•	To archive a related email, scroll down to the History sub-panel in the Detail View where related emails are listed and click Archive Email. This displays the Create Archived Email form. Copy-paste information related to the email into this form to save it for your records.

•	To copy the account's billing or shipping address to the associated contact records, in the Edit View, click the Copy

	To duplicate an account, click Duplicate

This duplicates the account and displays its Detail View page. Duplication is a convenient way of creating a similar account. You can change the information in the duplicate record to create a new account.

	To delete the account, click Delete on the Detail View page.

	To track changes in the account record, click View Change Log on the account's Detail View page.

	To view or manage related records in a sub-panel, see To manage related information in sub-panels.

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Opportunities

Overview

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

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

Sales stages

Based on the sales stage, the system calculates the probability of a sale. For example, at the Proposal sales stage, the system calculates the probability as 65%, and at the Negotiation sales stage, probability increases to 80%.

The following are the default sales stages in Sugar:

Prospecting. This is the first stage in the sales process and indicates that the

opportunity with this prospect is new and needs to be qualified by a sales representative.

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

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

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

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

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

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

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

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

Closed Lost. The sales representative has lost this opportunity.

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

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

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

Creating Opportunities

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

To create an opportunity

1.	Click Create Opportunity from the Actions bar on the Opportunities tab.

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

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

Opportunity Name. Enter a name for the opportunity.
Account Name. Enter the name of the account related to the opportunity. To choose from the list of existing accounts, click Select.
Currency. Select the currency used from the drop-down list.
Expected Close Date. The expected or estimated close date for this particular opportunity.
Opportunity Amount. Enter the estimated amount of the sale.
Type. Use this drop-down list to specify whether the opportunity is from an existing customer or a potential customer.
Sales Stage. Specify the current status of this opportunity from the drop-down list. The value specified for the Sales Stage determines the default value displayed in the Probability field on the Opportunity page.
Lead Source. Use this drop-down list to specify the lead source such as Trade Show or Cold Call.
Probability (%). Sugar determines the values for this field based on the selected Sales Stage value. For example, if the Sales Stage value is Closed/Won, then the probability changes to 100%. You can manually change the Probability% value.
Campaign. To associate an opportunity with a campaign, enter the campaign name or click Select to select it from the Campaigns list.
Next Step. Enter the next step in closing a sale.
Description. Enter a brief description of the opportunity.
Specify the following information in the Other section:
Assigned to. Enter the name of the individual you want to assign to the record or click Select to choose from the User List. By default, this record is assigned to you.

3.	Click Save to create the new

	opportunity; click Cancel to return to the Opportunity home page without saving the information.

Managing Opportunities

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

To manage Opportunities

•	To sort a list view, click any column title which has the ▪icon beside it; to reverse the sort order, click the column title again.

•	To edit or delete information related to multiple opportunities, select multiple records in the Opportunities List View and click the Mass Update link in the Actions drop-down list. For more information, see To edit or delete multiple records.

•	To import records, select Import Opportunities from the Actions bar on the Opportunities tab. For more information on importing data, see Importing Data.

•	To export records, select the records from the Opportunities List View, click Export in the Actions drop-down list and follow the process described in Exporting Data.

•	To merge duplicates, select the records from the Opportunities List View, click Merge in the Actions drop-down list and following the process described in To merge duplicate records from the List View.

•	To view the details of an opportunity, click the opportunity name in the List View.

•	To edit the details, on the detail page, click Edit.

•	To duplicate an opportunity, click Duplicate on the Detail View page. Duplication is a convenient way of creating a similar opportunity. You can change the information in the duplicate record to create a new opportunity.

•	To delete an opportunity, click Delete on the Detail View page.

•	To track changes to an opportunity over time, click the View Change Log tab on the Detail View of the page.

•	To view and manage related records in a sub-panel, see [To manage related information in sub-panels](#).

•	To archive a related email, scroll down to the History sub-panel in the Detail View and click Archive Email. This displays theCreate Archived Emails page. Copy-paste information related to the email into the Create Archived Emails page and save it for your records.

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Documents

Overview

Use the Documents module to create and manage files that you share with users

and contacts.

Creating Documents

You can create a library of documents and graphics that you can share with other users and contacts, ranging from marketing collateral to contracts. You can also create templates for frequently used documents.

To create a document

1.	Select Create Document from the Actions bar on the Documents tab or click the Create icon on any page within the Documents module or

Go to the Detail View of any module that has the Documents subpanel (for example, Accounts).

2.	Enter information for the following fields on the Documents page:

File Name. Name of the file you are using to create the document; click Browse to navigate to the location of the document.
Document Name. Enter a name for the document.
Document Type. Select a pre-defined document from this drop-down list. If the document does not belong to any of the listed types, select None.
Publish Date. Click the Calendar icon and select the date when the document is published for other users to view and download it.
Expiration Date. Click the Calendar icon and select the date when the validity of the document expires. For example, collateral for a sales campaign may not be useful after the campaign ends.
Status. Select the status from this drop-down list, to indicate the current state of the document such as Draft or Under Review.
Revision. Enter the revision number if you revised this document.
Template. Select this box if you are creating a template.
Category. Select a pre-defined category from this drop-down list. Select None If none of the categories apply.
Sub Category. Select the applicable category subset if you selected a category. When you select a category and sub-category for the document, the document is added to the Document tree using a hierarchical structure. The tree structure displays in the List View to make it easier to find documents under a specific subject. The administrator defines the category and sub-category values.
Related Document. Click Select to associate a related document.
Related Document Revision. This is auto-populated by the revision number of the associated document.
Description. Enter a brief description of the document.

3.	Click Save to create the document; click Cancel to return to the document list without saving the document.

Managing Documents

Managing Documents includes tasks such as editing, deleting, and tracking changes.

To manage Documents

•	To sort a List View, click any column title which has the icon beside it; to reverse the sort order, click the column title again.

•	To edit or delete information related to multiple documents, select multiple records in the Documents List View and click the Mass Update link in the Actions drop-down list. For more information, see To edit or delete multiple records.

•	To view the details of a document, click the document name in the List View.

•	To view an attachment, click the attachment link; To update an attachment, see To update an attachment.

•	To edit a document, click Edit on the Detail View page.

•	To duplicate an opportunity, click Duplicate on the Detail View page. Duplication is a convenient way of creating a similar document. You can change the information in the duplicate

	record to create a new document.

•	To delete a document, click Delete on the Detail View page.

•	To export documents, select them from the Documents List View, click Export in the Actions drop-down list and follow the process described in Exporting Data

•	To create or manage related records in a sub-panel, see To manage related information in sub-panels.

To update an attachment

1.	Click Create in the Document Revisions

This displays the Document Revisions >> Create page.

2.	Enter information for the following fields:

FileName. Enter the name of the file containing the revised information; to navigate to the file location, click Browse.
Revision. This field is auto-populated with the revision number.
Change Log. Enter a brief description of the revision.

3.	Click Save to save your changes; click Cancel to go back to the document detail page without saving your changes.

You cannot change the name of the attached file. The revised file is displayed along with its revision number in the Documents Revisions sub-panel. The row listing the older document version now displays the rem icon to remove the file.

4.	To remove the previous version of the attachment, click the rem icon, and click OK to confirm the removal.

Identifying MS Word Mail Merge Templates

You can identify Microsoft Word mail merge templates in the Documents module.

These templates are used when a mail-merge is performed directly from within Sugar and can be created from the Sugar Plug-in for Microsoft Word and uploaded to the Sugar document repository.

•	The document type displays as Mail Merge on the Detail View page if it is a Mail Merge template.

•	A link allows direct access to the Sugar Mail Merge Wizard in the navigation bar.

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Calendar

Overview

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

Calendar actions

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

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

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

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

Today. Use this option to view the current day on your Calendar.

Using the Calendar
Viewing Calendar

Click the appropriate button at the top left of the Calendar home page to view your

calendar by day, week, month or year.

Change the first day of the week displayed in Calendar by adjusting settings in your User section. For more information, see User Settings section of Getting Started.

Meetings, Tasks and Calls are displayed in individual color codes. Meetings are displayed in blue, Calls in red, and Tasks in green to distinguish and identify them easily in Calendar.

Click on any record to view the information in Quick Edit forms. Click the Full Form button in the Edit Activity form to view the Detail View page.

Navigate to any date using the Calendar icon. The Calendar icon is located next to the Settings button on the upper right corner of the Calendar modules page. Click on the Calendar icon and select any date within the same month or use the left or right arrows to navigate to previous or upcoming months.

Alternatively, use the Previous and Next arrows to navigate to the previous and next day/week/month/year, depending on your Calendar View settings.

Calendar has been added as one of the Sugar Dashlets in the Add Sugar Dashlets>Modules tab in 6.4.0.

Creating records in Calendar

You can create records in Calendar by any one of the following methods:

- Click on any time slot in Calendar and input information in Quick Create forms
- Select the Schedule Meeting or Schedule Call option from the Calendar Actions drop-down menu option
- Select the Schedule Meeting or Log Call menu option from the Quick Create drop-down list on any Sugar page
- Select the Meetings>Schedule Meeting, Calls>Log Call Actions drop-down list in Meetings or Calls modules

Create recurring events such as Meetings and Calls with instructions provided in the Recurring Meetings and Calls section on this page.

Editing records in Calendar

Click on any Meeting or Call record in Calendar to view and update the

information in Quick Edit forms.

Change (extend or shorten) the duration of individual Meetings and Calls by dragging the records in Calendar. Note that all occurences of Recurring Meetings and Calls cannot be modified by dragging one record of the series.

Specify the end time of a Calendar event by selecting the time in the End Date fields. Note that the Duration is automatically updated based on the data entered in End Date fields. Similarly, if you enter information in the Duration field, End Date field is automatically updated.

Meeting and Call reminders can be sent via email, in addition to pop-ups in Sugar. Input appropriate information in the Reminders section in the Calendar record and click Save.

Create recurring Meetings and Calls using Quick Create forms. For more information, see Recurring Meetings and Calls section on this page.

Drag and drop items in Calendar to move them from one time slot to another. Note

Navigate to the record's Detail View page to create a related note or attachment for any Meeting, Call, or Task. Go to the module (for example Meeting, Call, or Task), select the record from the module's List View page and use the Create Note or Attachment button.

Send Meeting invites to Contacts and Leads not yet recorded in Sugar

With Sugar 6.5, you can send invites for Meetings and Calls to Contacts or Leads who do not have records in Sugar. You will be prompted to create their records during the Send Meeting Invite process.

1. Click desired time slot in Calendar to open the Create Activity (Quick Create) form.
   (You can also create a Meeting or Call record by any one of the methods discussed in Creating records in Calendar section above).
2. Click the Invitees tab in the Create Activity form.
3. Enter the information in the Add Invitees section.
4. Click the As Contact or As Lead button in the Create an Invitee section.
   The information entered in the Add Invitees section is pre-populated in the Create an invitee section.
5. Click Create & Add.
   The new Contact or Lead is added to the Meeting or Call invite.
6. Click the Details tab and enter mandatory information related to the Meeting or Call.

7. Input information in the Occurence tab if required. (For more information on Recurring Meetings and Calls, see the section below)
8. Click Save & Send Invites.

Send Meeting reminders via Email

Meeting reminders not only display as pop-ups in the application for Sugar users, they can be emailed to all invitees (including non-Sugar users) as well. Select the Reminders>Emails checkbox in the Create Activity form and set the time for the reminder email to be sent out by selecting one the options in the drop-down list.

Recurring Meetings and Calls

Create recurring Meetings and Calls

Use Quick Create forms in Calendar to create recurring Meetings and Calls.

Note: Recurring Meetings and Calls can be created using Quick Create forms in Calendar only. This feature is not available in Full Forms in Calendar, Meetings, or Calls.

1. Click on any time slot in Calendar to view the (Quick Create) Create Activity form.
2. Select Schedule Meeting or Log Call.
3. Input all mandatory fields indicated by red asterisks.
4. Click the Occurence tab.
5. Select Daily/Weekly/Monthly/Yearly from the Repeat drop-down list. Choose specific days of the week by selecting Weekly from the Repeat drop-down list and selecting days in the On section.
6. Optionally, select the End: By button to view the Select Date calendar.
7. Select the End Date in the displayed calendar and click Save.

Delete or edit recurring Meetings and Calls

1. Click on any recurring event in Calendar.
   This displays the Edit Activity form.
2. Select the Occurence tab in the Edit Activity form.
3. Click the Remove All Occurences button to delete all recurring events in the series and click Save.
4. Or, click the Edit All Occurences button to modify information related to the series and click Save.

iCal integration

All Meetings and Calls, including recurring events, can be synced between Sugar and iCal. Meetings synced from iCal to Sugar can be edited in iCal only.

Follow the steps listed below to integrate iCal with Sugar:

1. Open iCal.
2. Select Subscribe from the Calendar menu option.
   This displays a dialog box with a Calendar URL field.
3. Go to your User Profile section in Sugar.
4. Select the Advanced tab.
5. Scroll down to the Calendar Options section in User Profile>Advanced.
6. Copy the iCal integration URL.
7. Return to the iCal window and paste the iCal integration URL in the Calendar URL field.
8. Click Subscribe.
   This displays an Authentication dialog box.
9. Enter your Sugar login credentials in the Authentication box and click OK.
10. Uncheck Remove:To Do items (or Reminders, depending on your iCal version) to sync tasks between iCal and Sugar.
11. Click OK.

Viewing Shared Calendars

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

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

To view shared calendars

1.	Click Shared on the Calendar home

	page.

The page displays the Shared Calendar page.

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

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

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

4.	Choose a user and click Select.

This displays the selected user's calendar.

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Calls

Overview

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

Call actions

The Actions bar on the Calls tab displays the following options:

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

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

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

Scheduling Calls

You can schedule calls with users, contacts, and leads. Scheduling a call in Sugar

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

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

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

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

To schedule a call

1.	Select Log Call from the Actions bar of the Callstab.

2.	Enter information in the following fields:

Subject. Enter the subject of discussion.
Start Date & Time. Click the Calendar icon and select the date or input the data manually. Select the time, in hours and minutes, from the adjoining drop-down lists.
Status. Select one of the following from the drop-down lists:
Inbound. Choose this option if it is an inbound call.
Outbound. Choose this option if it is an outbound call.
Planned. Choose this option if the call is scheduled to take place.
Held. Change the status from Planned to Held after a call is completed.
Not Held. Change the status from Planned to Not Held if a call did not occur for any reason.
Related to. Enter or select the name of the related record such as an account, opportunity or contact from this drop-down list.
When you type a character in the field, the system performs a quick search of possible values and presents a list of values starting with that character. Typing additional characters restricts the search results. When searching for a name, Sugar respects the Name Display Format setting on the User Preferences page. If the setting specifies "s f l" (Salutation First Last), then Sugar displays a list of first names that start with the specified character. For example, if you enter "A", the system displays first names starting with "A". Similarly, if the Name display format specifies "s l f", then the system displays last names starting with "A".

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

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

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

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

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

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

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

3.	Click Save.

4.	Click Send Invites to send an invitation to the participants.

5.	To create a copy of the call, click Close and Create New.

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

To add invitees

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

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

2.	Click Search.

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

3.	Click the appropriate Add button to

	send an invitation to the user.

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

Managing calls

•	To sort a List View, click any column title which has the ▪icon beside it; to reverse the sort order, click the column title again.

•	To update information for some or all calls, use the Mass Update panel in the Actions drop-down list of the Calls List View as described in Editing and Deleting Multiple Records.

•	To import a list of calls, select Import Calls from the Actions bar of the Calls tab. For more information on importing data, see Importing Data.

•	To view the details of a call, click its Subject on the Calls List View.

•	To edit a call, click Edit on the call's Detail View page, revise the information and click Save. Associated information such as Contacts, Users, Leads, and Notes are displayed in sub-panels.

•	To duplicate a call, click Duplicate in the call's Detail View page. Duplication is a convenient way of creating a similar activity. You can change the information in the duplicate record to create a new activity.

•	To delete a call, click Delete on the call's Detail View page, and then click OK.

•	To find a specific call in the list, enter

	the subject or the contact name in the Search sub-panel above and click Search. To search only your records, select the My itemscheckbox.

•	To perform an advanced search with additional search filters such as related record, click Advanced.

•	To edit a related record, click the Edit icon for the related record in the sub-panel of the Detail View, make the changes, and click Save.

•	To remove an association with another record, scroll down to the related record in the call's Detail View, click the rem icon, and then click OK.

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Meetings

Overview

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

Meeting actions

The Actions bar on the Meetings tab displays the following options:

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

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

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

Scheduling Meetings

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

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

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

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

To schedule a meeting

1.	Select Schedule Meeting from the Actions bar of the Meetings tab.

2.	Enter information in the following fields:

Subject. Enter the subject of discussion.
Status. Select one of the following from the drop-down lists:
Planned. Choose this option if the meeting is scheduled to take place.
Held. Change the status from Planned to Held after the meeting is completed.
Not Held. Change the status from Planned to Not Held if the meeting did not occur for any reason.
Start Date. Click the Calendar icon and select the date or input the data manually. Select the time, in hours and minutes, from the adjoining drop-down lists.
Related to. Enter or select the name of the related record such as an account, opportunity or contact from this drop-down list.
When you type a character in the field, the system performs a quick search of possible values and presents a list of values starting with that character. Typing additional characters restricts the search results. When searching for a name, Sugar respects the Name Display Format setting on the User Preferences page. If the setting specifies "s f l" (Salutation First Last), then Sugar displays a list of first names that start with the specified character. For example, if you enter "A", the

system displays first names starting with "A". Similarly, if the Name display format specifies "s l f", then the system displays last names starting with "A".

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

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

Location. Enter the meeting location.

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

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

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

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

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

3.	Click Save to save the meeting details without sending meeting invitations. OR, click Save & Send Invites to save the Meeting details and send a meeting invitation. OR, click Close and Create New to create a copy of the Meeting. This closes the original meeting and changes its status to Held. The new meeting retains all the information of the original record except for the status, which by default is set to Planned.

To add invitees

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

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

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

2.	Click Search.

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

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

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

Managing Meetings

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

	change the information in the duplicate record to create a new activity.

•	To delete a meeting, click Delete on the meeting's Detail View page, and then click OK.

•	To find a specific meeting in the list, enter the subject or the contact name in the Search sub-panel above and click Search. To search only your records, select the My items checkbox.

•	To perform an advanced search with additional search filters such as related record, click Advanced.

•	To edit a related record, click the Edit icon for the related record in the sub-panel of the Detail View, make the changes, and click Save.

•	To remove an association with another record, scroll down to the related record in the meeting's Detail View, click the rem icon, and then click OK.

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Emails

Overview

The Emails module enables individual users to send and receive emails from within Sugar.

Email actions

You can use the Emails module for the following tasks:

•	Compose and send emails

•	View and process emails on external mail servers without downloading them into the Sugar database

•	Import emails into the Sugar database for necessary action

•	Associate an imported email with a related Sugar record such as a bug or an account to create a communication thread for future reference

•	Create a related record, such as a bug, from an email

•	Search for imported emails based on specific parameters

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

Configuring Email Settings

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

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

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

General Settings

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

To specify general settings

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

This opens the Settings pop-up box.

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

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

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

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

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

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

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

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

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

Mail Accounts

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

Group mail accounts are used to view and distribute emails addressed to the organization rather than an individual user. Only administrators can set up group

mail accounts. Administrators and users can view and distribute these emails for necessary action. As a user, you can subscribe to group mail account.

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

To create a mail account

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

This displays the Settings window

| 2. | Click the Mail Accounts tab in the Settings window. |

| 3. | Click Add inthe Mail Accounts section. |

This displays the Mail Account Properties page.

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

Mail Account Name. Enter a name for the mail account in Sugar.
User Name. Enter the username of your external mail account.
Password. Enter the password of your external mail account.
Mail Server Address. To access a Gmail account, click Prefill Gmail Defaults to autofill the mail server address, port number, and protocol. For other accounts, such as Yahoo, enter the address of the external email server from which emails will be viewed in Sugar.
Mail Server Protocol. Select IMAP from this drop-down list.
This displays the following fields:
Monitored Folders. By default, the system monitors the Inbox. To monitor other folders, click Select and view a list of available folders in the external mail account. To select multiple folders, press SHIFT or CONTROL on your keyboard.
Trash Folder. To select a Trash folder from the Folders list, click Select.
Sent Folder. To add a folder to view your outbound emails, click Select.
Use SSL. If your mail server supports secure socket connections, selecting this box will force SSL connections when importing emails into Sugar. This box is automatically selected when you click the Prefill GmailTM Defaults link.
Mail Server Port. The system automatically populates this field with the port number for IMAP.

| 5. | Click Test Settings to ensure that the |

	specified information is correct. An error message is displayed if errors are detected.

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

From Name. This field is automatically populated with your first and last names.
From Address. Enter the email address you want to display in the From field of emails that you send.
Reply to Address. Enter information in this field if you want responses to your emails to be directed to an email address other than the one specified in your incoming email account.
Outgoing SMTP Mail Server. Select an existing SMTP server from the drop-down list or select Add to specify a new SMTP server. For more information, see To add a mail server for outbound emails.

7.	Click Done to create the mail account.

This displays the mail account in the Mail Accounts table in the Settings window. The outbound mail server that you specified displays below in the Outgoing SMTP Mail Servers section.
All mail accounts that you create are listed in the Mail Accounts tab of the Settings

8.	To specify a default mail account, select the Default button corresponding to the mail account name. The From name and email address associated with the default mail account are used when you compose emails in Sugar.

9.	To create another mail account, click Add in the Mail Accounts panel in the Settings window and repeat the process described above.If not, click Done to close the Settings page.

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

To add a mail server for outbound emails

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

This displays the Outbound Mail Server Properties page. You can select Gmail, Yahoo!, Exchange, or Other.

2.	Add the applicable server:

	To add the Gmail server or the Yahoo! server, click the appropriate button, and enter the email address and password in the fields below

	To add an Exchange server or a different server, click Exchange or Other respectively, and enter the server name

3.	If the mail server requires authentication to send out emails, select the Use SMTP Authentication? box, and enter the user name and password in the fields below.

4.	To check if the outgoing email settings are correct, click Send Test Email.

If the settings are incorrect, Sugar displays an error message.

5.	Click Done to add the mail server.

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

To manage mail accounts

•	To view incoming emails in your inbox, click Check Mail while viewing the inbox or right-click the mail account and select Check Mail.

•	To mark the email as read, unread, flagged, or unflagged, select the email, right-click, and select Mark and then select the appropriate option.

•	To refresh the mail account view, right-click the account, and select

	Synchronize.

•	To delete the mail account, right-click the account, and select Delete Folder.

•	To rename the mail account, right-click the account and select Rename Folder. Enter a new name in the Mail Account Name field and click OK.

•	To empty the Trash folder, right-click the account and select Empty Trash.

•	To clear the email cache directory in Sugar, click Clear Cache Files.

Email Folders

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

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

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

To create a folder

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

The Add New Folder dialog box displays on the page.

2.	Enter a name for the folder and click OK

The new local folder is now listed under Folders in the left-hand panel. This folder is not associated with any of your mail accounts. You can import emails into this folder from any of your mail accounts.

3.	To create a new folder for an external mail account, select the account's inbox in the Folders tab, right-click, and select Create Folder; click OK.

4.	To create a sub-folder, select an existing folder in the account, right-click, select

To manage accounts and folders

1.	To check for new mail in your external mail account, right-click the account in Sugar, and select Check Mail.

2.	To synchronize the contents of your external mail accounts with the view in Sugar, select the account, right-click, and select Synchronize.

3.	To delete a folder, select it, right-click, and choose Delete Folder. Click OK to confirm the action.

4.	To rename a folder, select it, right-click, and choose Rename Folder. Enter the new name in the Rename Folder window and click OK to confirm the action.

5.	To remove deleted emails from the account's trash bin, right-click the account or one of the folders, and select

Composing and Managing Emails

When you compose an email, if you have configured multiple mail accounts, you

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

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

To compose an Email

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

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

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

From. To route the email through a specific mail account, click the down arrow to select an existing one from the drop-down list. The list contains all the outbound mail account servers set up by you or the System Administrator.
To. Click this button to select recipients from the address book, or manually enter the names of the recipients in this field. For more information on the address book, see Using the Address Book.
To send a copy of the email to other individuals, click AddCC and enter their email addresses in the CC field, or click the CC button to add recipients from the address book. To send a blind copy of the email to other individuals, click Add BCC and enter their names in the BCC field, or click the BCCbutton to select recipients from the address book.
Subject. Enter the subject of the email.
Enter the email text in the body field. To apply standard formatting options such as font face, size, bold, italics, indentation and color, highlight the text and click the appropriate buttons on the toolbar. You can select the desired style, format, and font from the appropriate drop-down list.
To send the email in plain text, click the Options tab in the right-hand panel and select the Send in Plain Text box.

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

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

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

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

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

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

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

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

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

To view and manage emails in the Sugar inbox

•	To check for new emails in a personal email account, select the account and click Check Mail.

•	To view an email in the panel below, select it in the List View and click it once. To view an email in a separate tab, double-click it in the List View.

•	Right-click an email in the inbox to perform any of the following actions:

	To import the email, open the email and click Import to Sugar.Alternatively, select the email in the List View, right-click, and select Import to Sugar. For more information, see To import emails to Sugar.

	To respond to the email, select Reply.

	To respond to all recipients of the email, select Reply All.

	To forward it to another individual, select Forward and enter the email address of the recipient.

	To delete an email when you view it, click Delete; to delete multiple emails, select them from the email list and click

	To print the email, click Print.

	To mark an email as unread, read, flagged, or unflagged, select Mark, and choose the option of your choice.

•	To view multiple emails, select two or

	more emails from the list, right-click, and select Open Multiple Messages.

•	To create a record from the email, open the email and select the record type from the Quick Create drop-down list. For more information, see To create a record from an imported email.

•	To view the email header information or the raw email text for debugging purposes, click View and select Display Headers and Display Raw Email respectively from the drop-down menu.

•	To update information such as email assignments and status change for multiple emails, select them from the Emails list and use the Mass Update panel as described in Editing and Deleting Multiple Records.

•	To assign an imported email, select it from the list, right-click, and select Assign To. See To assign emails to users

•	To associate an email with another Sugar record, select the email from the Group mail inbox, right-click, and select

Using the Address Book

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

To use the address book

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

The Address Book window displays on the screen. If the list is paginated, the page

number display below. You can click the right arrow to move to the next page or the left arrow to move to the previous page. You can also click a page number to go directly to that page. To move to the first page, click the double-left arrow and to move to the last page, click the double-right arrow.

| 2. | To select email recipients, select them in the address book and click Add To. To add recipients to the CC list, click Add To CC; to add recipients to the BCC list, select Add To BCC. |

The selected names display in the Selected column.

| 3. | To filter the listings displayed in the address book, select the filter from the Recipient Type drop-down list. |

The address book listing changes to display only the specified individuals.

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

Importing Emails into Sugar

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

To import emails to Sugar

| 1. | On the Folders tab, click the inbox of your external mail account in Sugar |

| 2. | Select the emails that you want to import, right-click, and select Import to |

	Sugar. Alternatively, drag the email from the list to a local folder.

The Import Settings window displays on the screen.

3.	Enter information for the following fields:

Assigned To. To assign it to a different user, click Select to select from the Users List View.

Relate To. To relate the email to another record, select the module from the drop-down list, and then click Select to select the record from the module's List View.

Delete message from server. Select this box to delete the email from the external email server after you import it to Sugar.

4.	Click Import to Sugar to import the emails into Sugar.

Sugar displays a message after the email has been successfully imported. The import email now displays in your My Emails folder.

To assign emails to users

To assign one or more imported emails from your My Emails folder or from a Group account to a different user, do the following:

1.	Select the email from the list, right-click, and select Assign To.

The Assign To dialog box displays on the screen

2.	To assign a user, click the Select button adjacent to the Assigned To field, and choose from the list of existing users.

The selected user's name displays in the Assigned To field.

3.	To change an assigned user, select Replace and then click Select to choose a different user.

4.	Click Assign.

The emails no longer display in your My Emails folder or the Group account folder, but instead, appear in the My Emails folder of the assigned user.

Searching for Imported Emails

You can search for imported emails using one or more of the following fields: Subject, From, To, Date From, Date Until, Relate To, Assigned To, and Attachment. The DateFrom and Date Until time range applies to emails that were sent as well as emails that were received.

To search for imported emails in Sugar

1.	Navigate to the Search tab located in the left-hand panel of the Emails home page.

The Subject, From, and To fields display in the panel. Click More to view all the Search fields.

2.	Enter the appropriate information to search for imported emails in the system.

3.	Click Search.

The search results display imported emails assigned to you and your direct reports in the List View.

Associating Imported Emails with Other Sugar Records

You can associate an email with records in other modules, such as accounts, contacts, and bugs, during any of the following processes:

•	Importing emails: In the Import Settings

•	Viewing emails: When you open an email, click the Quick Create drop-down list to select the record that you want to create, such as a bug, case, contact, lead, or task. Sugar creates the new record and associates it with the email. Related emails are listed in the History sub-panel of the record's Detail View.

Alternatively, select the email from the list, right-click, and select Relate. In the Relate Email window, select the module from the Related To drop-down list, and click Select to choose the record with which to relate the email.

•	Composing emails: You can use the Relate To drop-down list and adjacent field, located at the top of the page, to select a record from another module.

To relate an email with another record

1.	Select the email from the list, right-click, and select Relate.

The Relate Email dialog box displays on the screen.

2.	Select the record type from Relate To drop-down list, and click Select to view the list of records and choose one.

3.	Click Relate to create the association.

The email is now associated with the selected records and is listed in the History panel of the record's detail page.

To create a record from an imported email

1.	To create a record such as a bug or a case, open the email, click Quick Create

The appropriate Quick Create form displays on the screen. The screen illustrated below displays the Quick Create form to create a lead.

2.	Enter the necessary information and click Save to create the record.

If you have not already imported the email, it will be imported and associated with the new record when you use Quick Create to create the record.

Creating Email Templates

You can use email templates to create form letters for automated email responses to inbound emails and for email campaigns. For example, when you receive an email regarding a bug or a case, you can send out an automatic reply stating that the matter will be addressed.

For email campaigns, you enter the message in the template and then specify the

variables such as the target names and addresses from the campaign target list. The system inserts these variables into the template to create a personalized email for each target. When you create an email template, you can embed images and attach files from the Sugar repository or from your local file system.

When you create a template for an email campaign, you can insert tracker URLs into the template to track campaign activity. For more information on email campaigns, see Executing an Email Campaign.

To create an email template

1.	Select Create Email Template from the Actions bar on the Emails tab.

If you are creating an email template for email campaigns, navigate to the Email Marketing record from an Email or Newsletter campaign's Detail View, and click the Create link that is located next to the Email Template field.

2.	Enter information for the following fields:

Name. Enter a name for the template.
Assigned to. To assign the template to a user, click the arrow button and select from the Users list.
Description. Enter a brief description about the template.
Insert Variable. From the drop-down list, select the record (for example Contact) and select a field such as Name and click Insert.
The system displays the variable in the Body field.

3.	Insert Tracker URL. This field displays only when you create the template from the email marketing record of an email campaign. From the drop-down list, select the tracker URL to insert and click Insert URL Reference.

The Body field displays a link named Default link text. The adjoining field displays the tracker name for plain text format. Use this if you want to display the email in plain text format.

4.	Subject. Enter the title of the message.

5.	Body. Enter the email message. You can also embed images and add URL links.

To view and use the HTML editor, click HTML in the Body field.

6.	To apply standard formatting options such as font face, size, bold, italics, indentation and color, highlight the text and select the appropriate option in the Body field.

7.	Send Text only. Select this box to display the email in plain text format. You can choose this option if an email client cannot render HTML code.

Attachments: To attach a file, click Browse to navigate to its location on your local machine, and select it. To attach an existing document from the Documents module, click Sugar Document and select it from the DocumentList.
To embed an image file in the template, click the paper clip icon that displays next to the file; to remove the attachment, click the Remove button.

8.	Click Save to create the template.

To manage email templates

•	To search for a template, enter the name or description in the Search sub-panel on the Email Templates page, and click Search.

•	To view the details of a template, click the template name from the list on the Email Templates page.

•	To edit the template, on the detail page, click Edit, make the changes, and click Save.

•	To duplicate the template, on the detail page, click Duplicate and click Save.

•	To delete the template, on the detail page, click Delete; to delete some or all the templates, select them from the list on the Email Templates Home page, and click Delete.

| • | To export one or more templates, select the templates from the list on the Email |

| • | To deselect templates that you selected in the list, click Clear All. |

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Tasks

Overview

The Tasks Module has been introduced as a separate module in Release 6.2.0 to allow for ease of use and access. Use the this module to schedule and manage tasks.

Task actions

The Actions bar on the Tasks tab displays the following options:

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

View Tasks. Select this option to view and manage tasks as described in To manage tasks.

Import Tasks. Select this option to import external data into a note as described in

Creating Tasks

Sugar enables you to create tasks and assign them to yourself or to other users. When you create a task, you can relate it to a specific record such as an account or an opportunity. You can also revise the task status and priority at any time to keep your records up-to-date.

To create a task

| 1. | Select Create Task from the Actions bar on the Taskstab. |

2.	Enter information in the following fields on the Tasks page:

Subject. Enter the subject of the task.

Status. Select the current status of the task, such as Not Started, In Progress, and

Start Date. Click the Calendar icon and select the start date for the task; When you enter a date, you must also select the time, in hours and minutes, from the adjoining drop-down lists. If there is no specific start date for the task, select the None box.

Due Date. Click the Calendar icon and select the completion date for the task; enter the time in the adjoining box. If there is no specific deadline for the task, select the None box.

Enter the due date information if you want to add the task on your calendar to receive a reminder when it is due.

Priority. Select a priority that reflects the importance of completing the task from this drop-down list.

Description. Enter a brief description of the task.

Related to. Enter the name of the related account or click Select to search for one. You can choose related record from other modules, for example, Opportunities, Bug Tracker etc., from this drop-down list.

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

Contact Name. Click Select to select an individual from the Contacts list. Typically, this is the contact for the specified account.

Assigned to. Click Select to select the individual who is assigned to the task. By default, it is assigned to you.

3.	Click Save.

4.	To change the status of the task to Completed and create a new one, click Close and Create New. The status of the new task, by default, is set to Not Started.

Managing Tasks

•	To edit or delete multiple tasks, use the

•	To view the details of a task, click its subject in the Tasks List View.

•	To edit the information, click Edit on the task's Detail View page, revise the information, and click Save.

•	To duplicate the information, click Duplicate on the task's Detail View page, make modifications if needed, and click Save. Duplication is a convenient way of creating a similar task. You can change the information in the duplicate record to create a new task.

•	To import tasks, select ImportTasks from the Actions bar of the Tasks tab. For more information on importing data, see Importing Data.

•	To delete the task, click Delete on the tasks's Detail View page.

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Notes

Overview

The Notes Module has been introduced as a separate module in Release 6.2.0 to allow for ease of use and access. Use the this module to create, view, and import Notes and attachments to records in Sugar.

Notes actions

The Actions bar on the Notes tab displays the following options:

Create Note or Attachment. Click this option to create a note or an attachment for

a call, a meeting, or a task as described in Creating Notes and Attachments.

View Notes. Click this option to create or view notes as described in Creating Notes and Attachments.

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

Creating Notes and Attachments

You can create and view notes from the Notes module or from the History sub-panel of a record's Detail View. Notes enable you to add comments on a subject and maintain a record of discussions pertaining to a call, meeting, or task. You can also attach supporting documents to a note.

To create a note or add attachments

1.	Select the Create Note or Add Attachments from the Actions bar of the

2.	Enter information for the following fields in the Create (Notes) page:

Contact. Enter the name of the contact. Click Select to choose one from the Contacts list or to search for a contact in the list.
Related To. Select the related record from the drop-down list or click the Select icon to search for one.
When you type a character in a field, the system performs a quick search of possible values and presents a list of values starting with that character. Typing additional characters restricts the search results.
When searching for a name, Sugar respects the Name Display Format setting on the User Preferences page. If the setting specifies "s f l" (Salutation First Last), then Sugar displays a list of first names that start with the specified character. For example, if you enter "A", the system displays first names starting with "A".
Similarly, if the Name display format specifies "s l f", then the system displays last names starting with "A".
Subject. Enter the subject of the note. This is a mandatory field, as indicated by the red asterisk.
Attachment. Click Browse to attach a document that located on your machine, navigate to the location of the file, and select the file.
Note. Enter the text of the note in this box.
Assigned to. Enter the text of the note in this box.

3.	To assign the note to a user, scroll down to the Other section, and click the arrow

	button to select a user from the Users list.

4.	Click Save to create the note or attachment; click Cancel to return to the Notes home page without saving your changes.

Managing Notes

•	To edit or delete multiple notes,use the

•	To view the details of a note, click its Subject on the Notes List View.

•	To edit the information, navigate to the Detail View of the Note, click Edit, revise the information, and click Save.

•	To duplicate the information, click Duplicate in the note's Detail View page.Duplication is a convenient way of creating a similar note. You can change the information in the duplicate record to create a new note.

•	To import notes, select ImportNotes from the Actions bar of the Notes tab. For more information on importing data, see Importing Data.

•	To delete the note, click Delete on the note's Detail View page.

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Targets

Overview

Use the Targets Module to track and manage targets as part of mass marketing campaigns. You can create many types of campaigns as described in Creating a Campaign.

Targets for Campaigns

A mass marketing campaign targets a large group of individuals or organizations. Therefore, the campaign process begins with identifying the targets. You can group multiple targets into a target list according to a set of predetermined criteria such as age group or spending habits.

You can associate a record with an existing campaign from Contacts, Leads, and Opportunities.

Creating and importing Targets

A target is an individual that you have some information on, but is not qualified as a lead or contact. Targets are stand-alone records that are not attached to contacts, leads, or opportunities. For more information on Target Lists, see Target Lists Module

Typically, you would create or import a target list, associate it with targets, and then associate it with a campaign. However, you can also create the campaign first and then associate it with a target list.

The general process is as follows: Targets ⟶ Target List ⟶ Campaign

To create a target

1.	Select Create Target from the Actions bar on the Targets tab.

Or, click the Create link in any Targets page.

Note:	Targets are stand-alone records that are not attached to Contacts or Leads. If you plan to send emails to existing Contacts or Leads, you can skip the step below.

2.	Enter information for the following fields in the Create (Targets) page:

Target Overview

First Name. Enter the target's first name
Last Name. Enter the target's last name
Title. Enter the designation of the target
Department. Enter the name of the department to which the target belongs
Account Name. Enter the name of the account related to the target
Office Phone. Enter the target's work number
Mobile. Enter the target's mobile phone number
Fax. Enter the target's fax number
Address Information. Enter the address information in the Primary Address section and select the Copy address from left checkbox to copy it to the Alternate Address section.
Email address. Enter one or more emails addresses for the contact and select Primary. If an email address is incorrect, select Invalid to indicate it. If you sent out campaign emails this contact and the individual chose to opt-out of receiving them, select Opted Out.
To add an additional email address, click Add Address. You can add multiple email addresses.
Description. Enter a brief description of the target
More Information
Do Not Call. Select this box to add the target's name to the Do Not Call list.
Other
Assigned to. Select the user who has ownership of the account related to the target.
Assigned to. Select the user who has ownership of the account related to the target.

| 3. | Click Save. |

This displays the target's Detail View page. You can now add the target to an existing target list. For more information, see .The target's detail page displays the Campaign Log sub-panel which lists all the campaigns that were sent to the target.

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Target Lists

Overview

Use the Target Lists Module to track and manage mass marketing campaigns. You can create many types of campaigns as described in Creating a Campaign.

Creating Target Lists

You can use one of the following methods to add targets to a target list:

•	Import records from a file (.csv or .tsv). For information on importing targets, see Importing Data.

•	Select records from the List View of Accounts, Contacts, Leads, and Targets.

A target list can specify either individuals who need to be included in a campaign or excluded from a campaign. You can create one of the following types of target lists:

Default. A list of people who are campaign targets and receive the campaign email.

Seed. A list of people who need to receive the campaign email but must not be tracked as potential leads. Typically, these are individuals who must approve the campaign before it is launched.

Test. A list of people who receive the campaign email to test how different email clients display the campaign message before you send it out to the default list.

Suppression List. A list of people you want excluded from the campaign email recipient list. Typically, these are people who chose to opt out of receiving your campaign message. Suppression lists can be by ID, email address, or domain.

Note:	Test and seed lists are ignored in email tracking statistics.

If you have multiple targets with the same email address, Sugar will send the campaign email to only one of the targets, chosen at random. The other email addresses, considered to be duplicates, are suppressed even though they are not on the opt-out list.

For non-email campaigns, if you have purchased a license for the Sugar Plug-in for Microsoft Word, you can create a form letter in Word for your targets and merge it with names and addresses of your targets in Sugar to create a customized campaign letter for each target. For more information on the plug-in, see Sugar Plug-in for Microsoft Word. For more information on performing a mail merge, see

To create a target list

1.	Select Create Target Lists from the Actions bar on the Target Lists tab, or

	click the Create link in any Target Lists

2.	Enter the following information in the Create (Target Lists) page:

Name. Enter a name for the target list.
Type. Select the target list type such as Default or Seed from this drop-down list.
User. Enter the name of the individual you want to assign to the record or click Select to choose from the User List. By default, this record is assigned to you.
Description. Enter a brief description of the target list

3.	Click Save.

You can now add records to the target list from the List View of Accounts, Contacts, Leads, and Targets.

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Campaigns

Overview

Use the Campaigns Module to track and manage mass marketing campaigns. You can create many types of campaigns as described in Creating a Campaign.

Creating a Campaign

You can create a campaign using the Campaign Classic option or the Campaign Wizard option. When you use the CampaignClassic option, you are creating a campaign record but you are not completing related tasks such as specifying the email settings. For more information on creating a campaign using the Classic option, see Creating a Campaign.

When you use the Campaign Wizard, it guides you through the process of creating the campaign as well as completing related tasks. For more information on creating a campaign with the Campaign Wizard, see Using the Campaign Wizard.

The Campaigns module provides an embedded Return on Investment (ROI) form that you can use to gauge the success of an executed campaign. For more information, see Viewing a Campaign's Return on Investment.

Types of Campaigns

You can create the many types of marketing campaigns such as Email, Newsletter, Mail, Web, Radio, Television, Print, and Telesales.

When you create a campaign such as Mail and Radio, you are creating a record in Sugar for your reference. However, you cannot execute the campaign through Sugar.

When you create an email campaign or a newsletter campaign, you can execute it through Sugar. An email campaign is a one-time email containing information that is of interest to your targets. A newsletter campaign is an email campaign containing a newsletter sent to your targets at periodic intervals. For example, a newsletter can contain information on product updates. You can send out a newsletter on a weekly, monthly, quarterly, or yearly basis. To measure the campaign's success, you can view statistics such as the number of targets that responded, the number of opportunities that were created, and the generated revenue.

After you launch an email or newsletter campaign, you can view its status to determine its success. For example, you can view how many targets viewed the campaign email, how many clicked any links that were included in the email, and how many leads and contacts were created from the campaign. For more information, see Managing Campaigns.

To capture leads from an email or a newsletter campaign, you can create a Web-to-Lead form. For more information, see Creating Web-to-Lead Forms.

For email campaigns, you can embed images to your email templates instead of sending them as attachments to prevent the email from being reported as spam. For more information on attaching images, see [Creating Email Templates](#).

A campaign diagnostic tool is provided to help ensure that all pending administrative tasks, such as setting up a bounce-handling inbox, have been completed. For more information, see Using the Campaign Wizard.

Note: You must be an administrator to use the Email Setup option that displays in the Actions bar.

To create a campaign

1. Select Create Campaign (Classic) from the Actions bar on the Campaigns tab.
2. Enter information for the following fields:
   Name : Enter the campaign name.
   Assigned to : Enter the name of the user assigned to the campaign; to choose a user from the Users list, click "Select", and click the user name.

Status : Select the current status of the campaign from the drop-down list.
Start Date : Click the Calendar icon and select the date on which the campaign begins.
End Date : Click the Calendar icon and select the date on which the campaign ends. Please note that the Start Date, End Date, and Status values are for your records only. These values do not impact the execution of an email marketing campaign.
Type : From the drop-down list, select the campaign type such as email or trade show. For more information on email campaigns, see Executing an Email Campaign.
Currency : From the drop-down list, select the currency used to calculate the budget, cost, and revenue.
Impressions : Enter the number of page impressions generated from the campaign. You will need to fill in this field after the campaign has commenced.
Budget : Enter the budget for the campaign.
Actual Cost : Enter the actual cost incurred to conduct the campaign.
Expected Revenue : Enter the estimated revenue from the campaign.
Expected Cost : Enter the estimated cost of the campaign.
Objective : Explain the goal of the campaign.
Description : Enter a brief description of the campaign.

3. Click Save to save the campaign; click Cancel to return to the Campaigns home page without creating the campaign.

Sugar displays the campaign's Detail View on the screen. This page contains sub-panels for targets, tracker URLs, and email marketing to create and view relevant information.

Executing an Email Campaign

Both the administrator and the user must perform a set of tasks to send an email campaign.

The administrator must complete the following tasks:

- Set up outbound emails to enable you to send out email campaigns, and specify the number of campaign emails in each batch.
- Specify a bounce-handling inbox to route campaign emails that bounce back to you. Bounced emails contain specific identifiers that set them apart from emails that are responses from your targets.
- Set up Scheduler jobs to process nightly mass email campaigns and bounced campaign emails.

The user must complete the following tasks:

1. Create an email campaign as described in To create a campaign. Alternatively, you can use the Campaign Wizard to create the campaign as described in Using the Campaign Wizard. The Campaign wizard will guide you through the steps listed below.
2. Specify the targets as described in the [Targets](#)documentation. You can import targets, create a new target list, or merge with existing target list.
3. Create an email template containing the message you want to convey to your targets. For more information, see [Creating Email Templates](#).
4. Set up tracker URLs to track response to your campaign. For more information, see Creating Tracker Redirect URLs. For more information on creating a mailbox, see [Email Settings](#).
5. Create an email marketing record that specifies information such as the target list, the email template, the campaign start date, and the bounce-handling inbox. For more information, see Creating Email Marketing Records.
6. Optionally, specify one or more Tracker Redirect URLs to track campaign activities. For more information, see To create a tracker redirect URL.
7. Optionally, run the diagnostic tool to ensure that the email campaign will be successfully executed. For more information, see To run diagnostics.
8. Send a test email to your test list to ensure the operation is successful. For more information on test lists, see the [Target Lists](#) documentation.
9. Clear statistics from the test email.
10. Request the administrator to schedule a job to send out the campaign emails.
11. Queue the email for the campaign launch.
12. Optionally, convert the campaign targets into leads or contacts.

You can associate a Web-to-Lead form with the campaign. For more information, see Creating Web-to-Lead Forms. After you launch an email campaign, you can view the campaign status for information on the campaign results. For more information, see Viewing Campaign Status.
Note: The start date, start time, and status specified on the email marketing page determine when the email is sent.

Creating Email Marketing Records

When you create an email campaign, you must also create an email marketing record that contains information on when and how the newsletter should be distributed. This includes the campaign target list, the email template, and the inbox to route bounced emails. The specified start date and time must pass before the campaign is queued for delivery. Emails that bounce back are sent to the From address defined in this record.

To create an email marketing record

1. In the campaign's Detail View, scroll down to the Email Marketing sub-panel and click Create.
2. On the Email Marketing page, enter information for the following fields:
   Name : Enter a name for the record.
   Status : From the drop-down list, select Active if the record is in use; only active records are queued for the campaign launch. Select Inactive if the record is not in use.
   Use Mailbox : From the drop-down list, select a mailbox that is set up for Bounce Handling.
   From Name : Enter the name of the organization or person that is sending out the email.
   Start Date & Time : Click the Calendar icon and select a date to send out the email. Enter the time in the adjoining field. Please note that to queue the email for campaign launch, select a date and time that have not already passed. Do this after you ensure that the test email was successful.
   Email Template : From the drop-down list, select an existing email template; to edit a template or create a new one, click the adjoining Create or Edit link respectively. You will need to edit the template to add the Tracker URLs described below into Text and HTML formats.
   Send This Message to : Select one or more target lists from the box below; to send it to all the target lists in the box, select the All Target Lists in the Campaign box.
3. To save the record, click Save; click Cancel to exit the page without saving your changes.

Creating Tracker Redirect URLs

A campaign email can contain not only the campaign message but also images and links. Links can direct targets to other URLs such as an external website or a .php file on your system.

You can create an Opt-out tracker URL to embed a "Unsubscribe" link that enables targets to unsubscribe themselves from your campaign mailing list. When targets click on the Opt-out link, the system logs the action for your records.

You can use one or more tracker URLs in your campaign emails to track the response to your campaign. The system generates a unique key for each URL and recipient and associates it with the email template. When recipients open the email and click on a URL link, the system uses the unique key identifier to track their action.

The Status page displays a Recipient Activity bar chart listing actions, such as Viewed Message and Opted Out. You can drill down the chart to view the list of recipients who performed a specific action. For more information, see Viewing Campaign Status.

Note: Before you create a campaign email, check with your system administrator to ensure that the outbound email process is configured to send emails from your system.

To create a tracker redirect URL:

1. On the Campaign's detail page, scroll down to the Tracker URLs sub-panel, and click Create.
2. On the Campaign Trackers page, enter information for the following fields:
   Tracker Name : Enter a tracker name for your reference; use alpha-numeric characters.
   Tracker URL : Enter the tracker URL; for example,
   http://www.sugarcrm.com.
   Opt-out Link? : Select this box to embed your Unsubscribe instructions in a tracker URL. By default, the system uses the removeme.php file which contains these instructions, and displays this file name in the Tracker URL field.
3. To create the campaign tracker, click Save; click Cancel to exit the page without saving your changes.

Sugar generates the tracker URL and displays it as "URL for Campaign Message". You can now insert this tracker URL into an email template of your choice. To create an email template containing tracker URLs, access the Email Template Editor from within an Email Marketing record. For more information on email templates, see Creating Email Templates.

Using the Campaign Wizard

You can use the Campaign Wizard to guide you through the process of creating a campaign.

To create a campaign using the Campaign Wizard, select Create Campaign (Wizard) from the Actions bar on the Campaigns tab. This displays the Campaign wizard.

1. Select the type of campaign you want to create and click Start.
2. Enter information for the following fields:
   Name : Enter the campaign name.
   Status : From the drop-down list, select the current state of the campaign.
   Assigned to : Enter the name of the user who is assigned to the campaign. To select from the Users list, click Select : By default, it is assigned to you.
   Type : If you are creating a non-email campaign, select the campaign type from the drop-down list.
   Frequency : This field displays only for newsletter campaigns. From the

drop-down list, select the intervals at which the newsletter will be emailed to targets.
Start Date : Enter the campaign start date; click the Calendar icon to select the date.
End Date : Enter the campaign end date; click the Calendar icon to select the date.
Description : Optionally, enter a brief description of the campaign.
3. Click Next to enter the campaign budget information.
4. Enter information for the following fields:
Budget : Enter a numerical value for the campaign budget.
Actual Cost : Enter the actual cost of the campaign.
Impressions : The number of times the campaign advertisement is viewed on the web.
Expected Cost : Enter the expected cost of the campaign.
Expected Revenue : Enter the estimated revenue from the campaign.
Currency : From the drop-down list, select the currency used for the campaign.
5. Click Next to enter the tracker URL information.
6. Enter information for the following fields:
Tracker Name : Enter a tracker name.
Opt-out link? : Select this box to create an opt-out tracker that allows targets to unsubscribe from your email campaigns.

If a target chooses to opt out of an email campaign, the system suppresses the target's information to ensure that they never receive any of your email campaigns or newsletter campaigns. The system also automatically selects the Email OptOut option on the target's detail page.
However, if a target chooses to unsubscribe from a newsletter campaign, the system suppresses the target information only for that specific campaign. You can still include it in target lists for other newsletter campaigns and email campaigns.

- Tracker URL : Enter the tracker URL. For more information, see Creating Tracker Redirect URLs.

Click Create Tracker. Sugar displays the new tracker. To create additional tracker URLs, click Create Tracker again and enter the new tracker information. Then Click Next.

If you are creating an email campaign or a non-email campaign, Sugar displays the Target Lists on the screen.

For a newsletter campaign, the Subscription Information page displays on the page.

- To use an existing target list, click Select and use the Search panel to find the list.

- To create a new target list, enter its name in the Target List Name field and select the type from the adjoining Target List Type field.

Sugar displays the target list name below. For newsletters, you must create the following three subscription lists:

- Subscription list : These targets receive the newsletter regularly.
- Unsubscription list : These targets are those who have chosen to opt-out of your mailing list.
- Test list: These targets are the recipients of the test email that you send out to ensure it is successful.

To create a custom list, select Allow Select and click Select to search for targets and create the list. For a system-generated list, select Auto-Create and the system displays the name of the list in the field above the Select button.

To save the campaign information and begin the process of specifying other details such as the email settings, click Save and Continue. If you plan to specify the email settings later, click Finish.

When you click Save and Continue, the Marketing Email page displays on the screen. For more information, see Creating Email Marketing Records. After clicking Finish, the campaign's Detail View displays on the screen. You can edit the information and create an email marketing record from this page.

Running Campaign Diagnostics

Executing an email campaign or a newsletter campaign involves several steps, some of which can be performed only by your administrator. The campaign diagnostic tool enables you to check if all pending administrative tasks have been completed before you attempt to launch the campaign.

To run diagnostics, select Diagnostics from the Campaigns tab. Sugar displays the If the email settings and a bounce-handling inbox have not been configured, warning messages display on this page. Contact your administrator to complete these tasks. To perform the diagnostics again, click Re-Check.

Testing Campaigns

Before you launch an email or newsletter campaign, it is recommended that you test it to check how different email clients display the campaign message.

To test a campaign click Send Test and on the Campaign's detail page, select the

message, and click Send. Ensure that you are sending out the campaign to the Test target list.

Note that in test mode, the system disables your suppression lists. Therefore, the campaign message is sent to targets on your suppression lists. The system also disables checks for duplicate email addresses, thereby allowing users to send a message multiple times.

Managing Campaigns

Managing Campaigns includes tasks such as sorting, editing, and duplicating campaign information.

- To sort the list view, on the Campaigns Home page, click any column title which has the
  icon beside it; to reverse the sort order, click the column title again.
- To update information for some or all campaigns, on the Campaigns home page, use the Mass Update panel as described in To edit or delete multiple records.
- To view the campaign's details, click the campaign name on the list. From the detail page, you can create Tracker URLs and Email Marketing Records for email campaigns. For more information on email campaigns, see Executing an Email Campaign.
- To edit the campaign information, on the detail page, click Edit.
- To duplicate the campaign information, on the detail page, click Duplicate. Duplication is a convenient way of creating a similar campaign. You can change the information in the duplicate record to create a new campaign.
- To perform a mail merge, on the detail page, click Mail Merge. For more information, see Performing a Mail Merge.
- After you launch non-email campaign such as a Telesales or a Mail campaign, you will need to mark the campaign manually as "sent". To do this, click Mark as Sent on the campaign's detail page. When you click this button, the Campaigns sub-panel on a targets' detail page indicates the Activity Type as Message Sent to indicate that the campaign material was sent to that individual.
- To delete a campaign, on the detail page, click the Delete.
- To send an email campaign to the test group before the formal launch, click Send Test.
- To queue email campaigns for the launch, click Send Emails.
- To send out the campaign message to the target audience, click Send, and on the Campaign Send page, select the message and click Send.
- To view the campaign status, see Viewing Campaign Status
- To track changes to a campaign over time, in the Detail View, click the View Change Log link.

- To export information on one or more campaigns, select them in the Campaigns List View page, click the Export option in the Actions drop-down list, and export them as described in [To export data from Sugar](#).
- To view or manage related records in a sub-panel, see [To manage related information in sub-panels](#).

Viewing Campaign Status

After you launch a campaign, you can view its results on the Campaign Status page to determine its success. A campaign's status displays data such as the number of messages sent and the number of messages that bounced back; how many targets viewed the campaign message, the number of lead and contact records that were created, and so on. This enables you to evaluate the effectiveness of the campaign for further action. For example, you can add targets that opted out of the campaign to the Unsubscription target list to ensure that they are not recipients of campaign emails in the future.

The sub-panels in the Detail View display the following information:

- A chart depicting the responses from campaign targets. This includes how many targets viewed the message, how many open any links that were included in the campaign email, and how many opted out of the campaign
- A list of any campaign emails that are still in the queue.
- A list of processed campaign emails.
- A list of targets who viewed the campaign email.
- A list of targets who viewed any links that were included in the campaign email.
- A list of leads resulting from the campaign. Leads are created when targets identify the campaign and, as a result, are converted into leads.
- A list of contact records that were created as a result of the campaign. These contacts are created when leads identify the campaign and, as a result, are converted into contacts.
- A list of campaign emails that bounced back because of invalid email addresses. This information is tracked only if your administrator has scheduled a job to track bounced emails.
- A list of campaign emails that bounced back for other reasons.
- A list of targets that opted out of the campaign.
- A list of email addresses that were added to the Suppression list. These include those that you added to the list, those that were marked as "Opt Out", and email addresses that were invalid.
- A list of opportunities that were generated from the campaign.

To view a campaign's statistics, click View Status on the Campaign detail page.

The system displays the campaign's status information such as the targets' response, number of leads created, and so on.

Viewing a Campaign's Return on Investment

For any campaign that you execute, Sugar provides an embedded ROI report based on the "Closed/Won" opportunities generated from the campaign. You can view this report from the campaign's detail page.

To view a campaign ROI report

1. Navigate to the campaign's Detail View.
2. Click the View ROI option that is located next to the View Status option.

Sugar displays the ROI chart on the screen. This chart displays the actual revenue versus the expected revenue generated from the campaign, as well as the actual cost of running the campaign versus the budget allocated for the campaign.

Creating Web-to-Lead Forms

You can create a Web-to-Lead form to capture leads from web-based campaigns or other web-based sources such as your website. When campaign targets submit the form, it is saved as lead information in the Sugar database. You can use this lead information to generate more opportunities for your organization.

When you generate a Web-to-Lead form, it is saved to the cache/generated_forms folder, from where you can copy it to other locations. You can view and edit generated forms in the TinyMCE editor. Only administrators can add additional fields to the form.

To create a lead form, select Create Lead Form from the Actions bar on the Campaigns tab.
This displays the Lead Form Wizard page. Click and drag the desired fields from the Available Fields list to the Leads Form (First Column) or the Leads Form (Second Column) list.
To move all the fields, click Add All Fields and then click "Next".
Enter information for the following fields and then click "Generate Form":

- Form Header : The default header displays. You can delete it and enter the desired header information.
- Form Description : Enter a brief description of the form.
- Submit Button Label : The default label displays on the page. You can delete it and enter the desired label.

- Post URL : The default location where the lead information will be stored displays on the page. To edit this information, select the Edit post URL? box and then enter the new location.
- Redirect URL : Enter the URL to the page that you would like your leads to view after submitting their information. If you do not specify a URL, Sugar will display a "Thank you for your Submission" message.
- Related Campaign : Enter the name of the campaign that is related to this lead form. To select from the Campaigns list, click Select.
- Assigned to : Enter the name of the individual you want to assign to the record or click Select to choose from the User List. By default, this record is assigned to you.
- Form Footer : Enter the form footer, if needed.

This displays the form in the TinyMCE editor. Modify the form if needed and click Save Web To Lead Form. To save the form, you can do one of the following:

1. Copy and paste the HTML from the box to a text file on your local machine. For On-Premise Sugar systems, the system saves it in the cache/ generated_forms folder on the Sugar server. You can copy it from the cache to a different location.
2. To save the generated form as a .htm file on your local machine, you can right-click Web to Lead Form, open the page in a new tab, select Save Page As from the browser's File menu and navigate to the location where you want to save it.
3. To view the form, click the Web To Lead Form link at the top of the page.

Performing a Mail Merge

You can create a form letter template for campaigns using the Sugar Plug-in for Microsoft Word and merge it with your target list to create personalized letters for each target. Typically, you perform a mail merge for non-email campaigns.

Note: You must purchase a license for Sugar Plug-in for Microsoft Word.

The process of performing a mail merge is as follows:

1. Ensure that your Administrator has enabled the Mail Merge option for your organization.
2. Ensure that you have enabled the Mail Merge option on your User Preferences page.
3. Define a template in Sugar Plug-in for Microsoft Word and upload it to Sugar.
4. In the Campaigns module, create a non-email campaign.
5. Create your target list and populate it with names and addresses from your list of contacts, leads, and targets. To notify your manager or other users, you

can also add those individuals from the Users list.

6. Perform a mail merge to merge the target addresses with the campaign letter to create personalized letters.

To perform a mail merge:

1. Click Mail Merge in the Campaign's Detail View page. This displays the Step 1: Selected Module and Template page. The Campaigns module is auto-selected in the Selected Module drop-down list.
2. Select the mail merge template from the Select Template drop-down list and click Next. Step 2 of the Mail Merge process displays on the page. The targets specified in your targets list display in the Available list.
3. Select the targets in the Available list and using the right arrow, move them to the Selected list.
4. Click Next. The final step of the Mail Merge process displays your selections for review. If you need to go back to the previous step to modify the target list, click Back.
5. Click Begin Merge.
6. Ensure that Open with Word is selected and click OK.

The merged document displays on the page. The system creates a log entry for each target for your records. You can view these entries when you click the View Status option on the campaign's detail page. If you perform mail merge operations repeatedly for these campaign targets, the system updates these log entries.

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Cases

Overview

Use the Cases module to track and manage services-releated problems reported by your users and customers.

After you create a case, you can associate it with related bugs.

Creating Cases

You can create cases in Sugar and you can also import them into Sugar as a comma-delimited, tab-delimited, or custom delimited file. To import cases, select Import Cases from the Cases Actions bar. For more information on importing data,

see Importing Data.

To create a case
Follow the steps listed below to create a case:

1.	Select Create Case.from the Actions bar on the Cases tab

or, Click the Create icon on any page within the Cases module.

2.	Enter information in the following fields on the Cases page:

Priority. Specify the urgency of the problem from this drop-down list.
Status. Specify the current status of the problem, such as New or Closed, from this drop-down list.
Type. Select Administration, User, or Product from this drop-down list if you want to categorize the case.
Subject. Brief statement of the problem.
Account Name. Name of associated account or click Select to choose the account.
Description. Description of the problem.
Resolution. Results of the investigation into the problem.
Specify the following information in the Other section:
Assigned to. Name of the individual you want to assign to the record or click Select
Case owners receive an email whenever a case is assigned to them if the administrator has enabled email notification.

3.	Click Save to save the case; click Cancel

This displays the Case Detail View page. Create new bugs for the case or associate it with existing bugs on this page. For more information on creating bugs, see To create a bug. You can also associate the case with new or existing records such as contacts and activities.

Managing Cases

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

To manage Cases

•	To sort a list view, click any column title which has the ▪icon beside it; to reverse the sort order, click the column title again.

•	To edit or delete information related to multiple accounts, select multiple records in the Cases List View and click the Mass Update link in the Actions drop-down list. For more information, see Editing and Deleting Multiple Records.

•	To view the details of a case, on the Cases home page, click on the case name in the list. This displays the Detail View page.

•	To edit the case details, click Edit on the Cases Detail View, update the information, and click Save.

•	To import records, select ImportCases from the Actions bar on the Cases tab. For more information on importing data, see Importing Data.

•	To export information on one or more cases, select them in the Case List sub-panel on the Cases Home (List View) page, click the Export ink in the Actions drop-down list, and export them as described in Exporting Data.

•	To merge duplicates, select the records from the Cases List View, click the Merge link from the Actions drop-down list, and follow the process described in

•	To duplicate a case, click Duplicate on the Cases Detail View page. Duplication is a convenient way of creating a similar case. You can modify the information in the duplicate record to create a new case.

•	To find duplicates, click Find Duplicates

•	To delete a case, click Delete on the Detail View page.

•	To track changes to the case over time, click View Change Log on the Detail View page.

•	To create or edit related records in a sub-panel, see To manage related information in sub-panels.

•	To archive a related email, scroll down to the History sub-panel in the Detail View, where related emails are listed, click Archive Email. This displays the Create Archived Emails page. Copy and paste information related to the email into this page and save it for your records.

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Bugs

Overview

Use the Bug Tracker module to report, track, and manage product bugs.. Bugs are defects or features associated with a particular revision of a product. The administrator populates the drop-down list of product releases. After you create a bug, you can associate it with the related case.

Note:	This module is hidden by default. The administrator must display it for your use.

Creating Bugs

You can create a bug in Sugar, or import them into Sugar as a comma-delimited, tab-delimited, or custom delimited file.

To create a bug
Follow the steps listed below to create a bug:

1.	Select Report Bug from the Actions bar on the Bug Tracker tab.

2.	Enter information for the following fields in the Create (Bug)page:

Subject. Enter a brief statement of the problem.
Priority. Specify the urgency of the problem in this drop-down list.
Source. Specify whether the bug was reported by an internal user (internal), external user through email (email), through your organization's website (web), or by an external developer community member on your organization's forum (forum).
Category. Select the product associated with the bug from this drop-down list.
Found in Release. Select product version in which the bug was found from this drop-down list.
Type. Select Defect from this drop-down list if the issue is a problem with the product. Select Feature if the issue is a suggested enhancement for the product.
Status. Specify the current status of the problem such as New or Closed from this drop-down list.
Resolution. Select the resolution to the bug from this drop-down list.
Fixed in Release. Select the product version in which the bug was fixed from this drop-down list.
Description. Description of the problem.
Work Log. Record your actions to resolve the bug.
Specify the following information in the Other section:
Assigned to. Enter the name of the individual you want to assign to the record or click Select to choose from the User List. By default, this record is assigned to you.

3.	Click Save to create the bug; click Cancel to exit the page without creating the bug.

This displays the Detail View page for the bug. Associate the bug with related records such as contacts and projects on this page. You can also create a new case for the bug or associate it with an existing case. For more information on creating cases, see Cases Module.

Managing Bugs

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

To manage Bugs

•	To sort a List View, click any column title that has the ⬚icon beside it; to reverse the sort order, click the column title again.

•	To edit or delete some or all the bugs, select Mass Update from the Actions bar. For more information, see To edit or delete multiple records.

•	To import records, click ImportBugs from the Bug TrackerActions bar. For more information on importing data, see Importing Data.

•	To export records, select them from the list, click the Export link from the Actions drop-down list and follow the process described in Exporting Data.

•	To merge duplicates, click the Merge link from the Actions drop-down list and following the process described in Merging Duplicate Records.

•	To view the details of a bug, click the bug in the Subject column on the Bug Tracker home page (List View).

•	To edit the bug details, click Edit on the Detail View page.

•	To duplicate a bug, click Duplicate on the Detail View page. Duplication is a convenient way of creating a similar bug. You can change the information in the duplicate record to create a new bug.

•	To delete a bug, click Delete on the Detail View page.

•	To track changes made to the bug over time, click View Change Log in the Detail View page.

•	To export information on one or more bugs, select them from the List View, click Export from the Actions drop-down list, and export them, following the instructions in To export data from Sugar.

•	To create or manage related records in a sub-panel, see To manage related information in sub-panels.

•	To archive a related email, scroll down to the History sub-panel in the Detail View where related emails are listed and click Archive Email. This displays the Create Archived Email form. Copy-paste information related to the email into this form to save it for your records.

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Projects

Overview

Use the Projects Module to create and manage projects for your organization.

Project ownership

Every project is assigned to a user. The assigned user is the project manager. By default, this is the user who created the project. The assigned user can assign the project to another user

Note:	By default, this module is hidden. The administrator must display it in order to enable you to use it.

Creating Projects

In the Projects module, you can create, manage, and duplicate projects and project tasks.

You can define multiple project tasks for each project. When you create a project task, you must associate it with a project. You can associate a project with multiple activities, accounts, opportunities, and cases. You can also create projects and project tasks from an email's detail page.

To create a project

1.	In the Actions bar, click Create Project.

2.	On the Projects page, enter information for the following fields:

Name. Enter a name for the project.
Status. From the drop-down list, select the project status such as Draft, In Review, or Published.
Start Date. Click the Calendar icon and select the project start date.
End Date. Click the Calendar icon and select the project end date.
Assigned to. Enter the name of the user who has ownership of the project. By default, it is assigned to you.
Priority. From the drop-down list, select the importance of the project such as Low, Medium, or High.
Description. Enter a brief description of the project.

3.	Click Save to create the project; click Cancel to exit the page without creating the project.

When you save the project, the project's detail page displays on the page.
From this page, you can relate the project to records such as contacts and opportunities.
To create a project task

1.	In the Project Tasks sub-panel, click Create.

2.	On the Project Tasks page, enter information for the following fields:

Name. Enter a name for the task.

Task ID. Enter a numerical value as the task identification number.

Start Date. Click the Calendar icon and select the date when the task is due to begin.

Finish Date. Click the Calendar icon and select a date when the task is due to be completed; enter the start time in the adjoining field.

Percentage Complete. Enter a numerical value to indicate what percentage of the task has been completed.

Priority. From the drop-down list, select a priority level that reflects the importance of completing this task.

Milestone. Check this box if the completion on this task is considered a milestone for project completion.

Project Name. Click Select and choose the project associated with the task.

Description. Enter a brief description of the task.

3.	Click Save to create the task; click Cancel to return to the project detail page without creating the task.

Managing Projects

•	To sort the list view on the Projects Home page, click any column title which has the icon beside it; to reverse the sort order, click the column title again.

•	To search for a project, see Searching for Information in Sugar.

•	To update or delete some or all the projects on the Projects Home page, use the Mass Update panel as described in To edit or delete multiple records.

•	To view the details of a project, click its name in the list view.

•	To edit the project details, click Edit on the project's detail page, make the necessary changes, and click Save.

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Export

Overview

You can export Sugar records in .csv format to your local machine. Use Microsoft Excel, Notepad, or other text editors to open .csv files.

The .csv file displays column titles, including the Record ID (a long string of letters and numbers used as a unique reference to each account record) and all the other fields in the module.

Note:	When exporting values for drop-down list options, Sugar exports the ID associated with each option (that is, item name) and not the display labels.

Export data from Sugar

1.	Select the records from the List View on the module's home page.

2.	Select Export from the Actions drop-down menu in the List View.

To export all records listed on the page, click Select located above the item list and select one of the following options:
This Page. To export all the records listed on the page, select this option.
All Records. To export all records on the list (if it is more than a page long), select this option.
This displays an Opening.csv dialog box.

3.	Select Open to open the export file in .csv format or select Save to Disk to save the .csv file to your local machine.

4.	Click OK to execute the operation. If you chose to open the file, the csv file opens in Microsoft Excel.

The file contains all the fields in the module from which you are exporting the data.

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Import

Overview

Import data for modules such as Accounts, Contacts, Leads, Opportunities, Targets, Calls, Meetings, and Tasks with the help of an easy-to-use User Import Wizard. Refer to the tool-tips and instructions provided in the wizard at every step of the import process.

User Import Wizard features

Features of the User Import Wizard are listed below:

- Sample .csv file for easier import of data — Use the available sample .csv file as a template for import of files
- Retain settings from previous imports — Save/preserve import file properties, mappings, and duplicate check indexes from previous imports for ease of current data import process
- Ability to accept both database name and display labels of drop-down and multi-select field items — Field labels as well as database names are accepted and mapped during import, but only the field labels are displayed for ease of use
- Ability to accept both usernames and full names in user fields during import and export of data — Full names of Users displayed for Assigned To and other User-related fields in exported .csv file for easier identification of user records
- Ability to auto-detect file properties in import file — Upload import files without specifying file properties such as tab, comma, double and single quotes, date and time formats, making the process simpler and faster
- Ability to import contacts from external sources such as Google — Ability to import Google Contacts for person-type modules such as Contacts, Leads, and Targets, relate Sugar records to Google Contacts, and communicate with Google Contacts from within Sugar

Importing data

Note: Always import the Account data first and then import Contacts and other data related to Accounts (such as Meetings, Calls, Notes) to automatically create a relationship between the imported Account and Contacts and activity records related to the Account.

Follow the steps listed below to import data for a module, such as Accounts:

1. Select Import from the Actions drop-down list in the module's menu options. This displays Step 1 of the import process with a link to a sample Import File Template.
2. Upload your import file to this page using the Browse button in the Select File field or,
   Optionally, download the available template, delete the existing data, input your data and upload to this page using the Browse button.
3. Click Next.
4. This displays Step 2 (Confirm Import File Properties).
   Auto-detection of imported data takes place at this step.
5. Click View Import File Properties button to verify and change the data as needed, if you notice irregularities in the Confirm Import File Properties table.
6. Click the Hide Import File Properties to collapse the panel.
7. Click Next.
   This displays Step 3: Confirm Field Mappings.
   The table in this page displays all the fields in the module that can be mapped to the data in the import file. If the file contains a header row, the columns in the file map to matching fields.
8. Check for correct mapping and modify if necessary.
9. Map to all of the required fields (indicated by an asterisk).
10. Click Next.
11. This displays Step 4: Check for Possible Duplicates.
12. Follow the instructions on this page.
    Step 4 also provides the option of saving the current import file properties, mappings, and duplicate check indexes for future imports.
13. (Optionally) Save the import settings.
14. Click Import Now.
15. Click the Errors tab to check for errors in the process. Follow the instructions to fix problems (if any) and Click Import Again.
    This displays Step 1 of the import process.
16. Follow all the steps in the wizard through Step 5.
    If the import was successful, you can to view all the imported records at Step 5.
17. Click Undo Import if you are not satisfied with the imported records,
    Or, click Import Again to import more data
    Or, click Exit to navigate to the List View page of the module that you imported your records into.

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Employees

Overview

Use the Employees module to view information such as name, title, and email address for employees in your organization.

All Sugar users are employees, not all employees are Sugar users. An employee needs a username and password to log into Sugar to be a user.

Viewing and contacting Employees

Users can only view Employee records. Administrators can create and manage Employee records. Click the Employees link in the top right corner of any Sugar page to access the List View page of the Employees module. You can perform the following actions from the Employees List View page:

- To search for an Employee, use the Search sub-panel located above the Employees list.
- To view an Employee's details such as the title and contact information, click the Employee name in the list.
- To email an Employee, click the Employee's email address. This opens a Quick Compose form. Input details and send the email message.

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