
Sugar Corporate 6.5 Administration Guide

Sugar Corporate 6.5 Administration Guide	18
Introduction	18
Overview	18
Core Admin Features	18
Admin Wizard	19
Overview	19
Login Screen	19
Language	19
Branding	20
System Locale Settings	21
SMTP Server Specification	22
Your Information	24
Your Locale	25
Team Management	27
Overview	27
Teams Module Tab	27
Team Types	28
The Global Team	28
Standard Teams	28
Private Teams	28
Team Membership Types	29
Creating Teams	30
Creating Via Teams Module	30
Creating Via Duplication	31
Adding Users to Teams Via Teams Module	31
Adding Users to Teams Via Users Module	32
Viewing Teams	34
Viewing Via List View	34
Viewing Via Detail View	34
Viewing Via Recently Viewed	34
Viewing Via Dashlets	35
Viewing Via Reports	35
Searching Teams	36
Teams List View	37
Pagination	37
Checkbox Selection	37
Actions Menu	38
Column Sorting	38
Teams Detail View	38
Actions Menu	39
Users Subpanel	39
Next or Previous Record	40
Editing Teams	41
Editing Via Detail View	41
Editing Via List View	41
Editing Via Users Module	42

Deleting Teams	42
Deleting Via Detail View	42
Deleting Via List View	43
Removing Users From Teams	43
Repairing Teams	45
Team Notices	45
Creating Team Notices	46
Managing Team Notices	47
Role Management	48
Overview	48
Roles Module Tab	48
Creating Roles	49
Creating Roles Via Role Management	49
Creating Roles Via Duplication	50
Setting Module-Level Permissions	50
Setting Field-Level Permissions	54
Assigning Users to Roles	56
Assigning Via Role Management	56
Assigning Via User Management	57
Viewing Roles	58
Viewing Via List View	58
Viewing Via Detail View	59
Viewing Via Recently Viewed	59
Viewing Roles by User	59
Viewing Via Users Module	60
Searching Roles	61
Roles List View	62
Pagination	62
Checkbox Selection	63
Column Sorting	63
Roles Detail View	64
Actions Menu	64
Module-Level Permissions	64
Field-Level Permissions	65
Users Subpanel	65
Editing Roles	66
Editing Via Detail View	66
Editing Via List View	67
Editing Via Users Module	67
Deleting Roles	68
Deleting Via Detail View	68
Mass Deleting Via List View	68
Password Management	69
Overview	69
Password Requirements	69
Advanced Options	70

System Generated Passwords	71
User Reset Password	71
CAPTCHA Validation	72
Email Templates	73
User-Generated Password Expiration	74
Login Lockout	74
External Authentication	75
LDAP	76
SAML	78
Setting User Passwords	79
User Management	79
Overview	80
User Types	80
Regular User	80
System Administrator	80
Group User	81
User Fields	81
Users Module Tab	86
Creating Users	87
Creating Via Module Tab	88
Regular and Admin Users	88
Group Users	90
Creating Via Duplication	91
Creating Via Import	92
Viewing Users	93
Viewing Via Recently Viewed	93
Viewing Via List View	94
Viewing Via Detail View	94
Viewing Via Dashlets	94
Viewing Via Reports	95
Searching Users	95
Basic Search	96
Advanced Search	96
Users List View	97
Checkbox Selection	97
More Actions Menu	98
Pagination	98
Column Sorting	99
Users Detail View	99
Actions Menu	99
Tabs	100
User Profile	100
Themes	101
Advanced	101
Access	101
Subpanels	102

Editing Users	102
Editing Via Detail View	103
External Accounts	104
Editing Via List View	105
Editing Via Reports	106
Deleting Users	106
Exporting Users	107
Mass Updating Users	108
Resetting User Homepages	109
Resetting User Preferences	109
Resetting User Passwords	110
Reassigning Records	112
Sugar Connect	114
Overview	114
License Management	115
Download Key	115
Editing the License Key	115
License Validation	117
License Expiration	117
Re-validating the License	117
Manual Validation	118
Sugar Support Portal	119
Submitting Cases Via Case Portal	120
Sugar Updates	121
Online Documentation	122
System	124
Overview	124
System Settings	125
User Interface	126
Proxy Settings	128
SkypeOut	129
Mail Merge	129
Advanced	129
View Log	131
Locale	132
User Interface	132
System Currency	133
Export Settings	133
Database Collation	134
Currencies	134
Languages	135
Search	136
Enabling Modules for Global Search	136
Activating Full Text Search	137
Indexing Full Text Search	138
Connectors	139

Setting Connector Properties	140
Enabling Connectors	142
Mapping Connector Fields	143
Managing Connector Search	145
Themes	146
Activity Streams	147
OAuth Keys	149
OAuth Fields	149
OAuth Module Tab	150
Creating OAuth Keys	150
Creating Via OAuth Module	151
Creating Via Duplication	151
Viewing OAuth Keys	152
Viewing Via List View	152
Viewing Via Detail View	152
Viewing Via Recently Viewed	152
Searching OAuth Keys	153
Basic Search	153
Advanced Search	154
OAuth List View	154
Pagination	155
Checkbox Selection	155
Actions Menu	156
Column Sorting	156
OAuth Detail View	156
Actions Menu	157
Next or Previous Record	157
Tokens	157
Editing OAuth Keys	158
Editing Via Detail View	159
Editing Via List View	159
Deleting OAuth Keys	159
Deleting Via Detail View	160
Mass Deleting Via List View	160
Exporting OAuth Keys	160
Mass Updating OAuth Keys	161
Import Wizard	162
Upgrade Wizard	162
Backups	162
Repair	163
Diagnostic Tool	163
Tracker	166
Scheduler	167
PDF	167
Mobile	168
Configuring Sugar Mobile	168

Configuring Mobile Browser Access	169
Editing Mobile Settings	169
Repair	170
Overview	170
Quick Repair and Rebuild	170
Upgrade Teams	172
Expand Column Width	172
Rebuild .htaccess File	173
Rebuild Config File	173
Rebuild Sugar Logic Functions	174
Rebuild Relationships	174
Rebuild Schedulers	174
Rebuild Sugar Dashlets	175
Rebuild WorkFlow	175
Rebuild Javascript Languages	176
Rebuild JS Compressed Files	176
Rebuild JS Grouping Files	176
Rebuild Minified JS Files	176
Rebuild Sprites	177
Repair JS Files	177
Repair Non-Lowercase Fields	178
Repair Teams	178
Repair Roles	179
Repair Oracle VARCHAR2 Columns	179
Rebuild fulltext indices	179
Repair Inbound Email Accounts	179
Remove XSS	180
Repair Activities	180
Enable/Disable Seed Users	180
Schedulers	181
Overview	181
Schedulers Fields	181
Default Schedulers	182
Process Workflow Tasks	183
Run Report Generation Scheduled Tasks	183
Prune Tracker Tables	184
Check Inbound Mailboxes	184
Run Nightly Process Bounced Campaign Emails	184
Run Nightly Mass Email Campaigns	185
Prune Database on 1st of Month	185
Update tracker_sessions Table	186
Run Email Reminder Notifications	186
Clean Jobs Queue	186
Removal of Documents From Filesystem	186
Schedulers Module Tab	187
Creating Schedulers	187

Creating Via Schedulers Module	188
Creating Via Duplication	188
Viewing Schedulers	189
Viewing Via List View	189
Viewing Via Detail View	189
Viewing Via Recently Viewed	190
Searching Schedulers	190
Schedulers List View	191
Pagination	191
Checkbox Selection	191
Actions Menu	192
Favorite Designation	192
Column Sorting	193
Schedulers Detail View	193
Actions Menu	193
Favorite Designation	194
Next or Previous Record	194
Job Log	194
Editing Schedulers	195
Editing Via Detail View	196
Editing Via List View	196
Deleting Schedulers	197
Deleting Via Detail View	197
Mass Deleting Via List View	197
Exporting Schedulers	198
Mass Updating Schedulers	198
Favoriting Schedulers	199
Favoriting Via List View	199
Favoriting Via Detail View	200
Advanced Options	200
Setting up Cron Scheduler	201
Setting Up in Unix/Linux	202
Setting Up in Windows	202
Email	203
Overview	203
Email Settings	203
Outgoing Mail Configuration	203
Email Options	205
Email Security Settings	205
Campaign Email Settings	206
Email Archiving	207
Enabling Email Archiving	207
Using Email Archiving	208
Inbound Email	209
Inbound Email Fields	209
Inbound Email Module Tab	212

Creating Inbound Email Records	213
Creating Group Mail Accounts	214
Creating Bounce Handling Accounts	214
Creating Via Duplication	215
Viewing Inbound Email Records	216
Viewing Via List View	216
Viewing Via Detail View	216
Viewing Via Recently Viewed	217
Inbound Email List View	217
Modifying Case Macro	217
Pagination	217
Checkbox Selection	218
Action Buttons	218
Column Sorting	219
Inbound Email Detail View	219
Action Buttons	219
Editing Inbound Email Records	220
Editing Via Detail View	220
Editing Via List View	220
Deleting Inbound Email Records	221
Deleting Via Detail View	221
Mass Deleting Via List View	221
Creating Cases From Email	222
Email Queue	222
Viewing Via List View	223
Searching Queued Email	223
Basic Search	223
Advanced Search	224
Email Queue List View	225
Pagination	225
Checkbox Selection	225
Actions Menu	226
Column Sorting	226
Deleting Queued Email	227
Mass Deleting Via List View	227
Mass Updating Queued Email	227
Sending Queued Email	228
Developer Tools	229
Overview	229
Studio	230
Module Builder	231
Module Loader	231
Configure Module Menu Filters	231
Configuring New Groups	232
Editing Existing Groups	233
Dropdown Editor	234

Add Dropdown List	234
Viewing Dropdown Lists	236
Editing Dropdown Lists	237
Editing Opportunity Sales Stages	239
Editing Time Intervals	240
History Subpanel	240
Rename Modules	241
Display Modules and Subpanels	242
Configure Navigation Bar Quick Create	243
Workflow Management	244
Studio	244
Overview	244
Navigation	245
Main Panel	245
Modules Panel	245
Footer	246
Modifying Labels	247
Fields	248
Field Types	248
Field Options	250
Creating Fields	257
Editing Fields	258
Deleting Fields	259
Cloning Fields	261
Relationships	263
Relationship Types	263
Creating Relationships	265
Editing Relationships	267
Deleting Relationships	268
Layouts	270
Layout Types	270
Layout Options	274
Sync And Copy	276
Editing Layouts	276
Editing Convert Lead Layout	281
Subpanels	282
Subpanel Options	283
Modifying Subpanels	284
Mobile Layouts	286
Mobile Layout Types	286
Mobile Layout Options	286
Modifying Mobile Layouts	287
Using Sugar Logic	288
Functions	289
Fields	295
Related Field	296

Rollup	296
Viewing Layout History	297
Restoring Layout Defaults	298
Resetting Modules	298
Export Customizations	299
Module Builder	300
Overview	300
Navigation	301
Main Panel	301
Packages Panel	301
Footer	302
Packages	302
Creating Packages	303
Deploying Packages	304
Deleting Packages	305
Modules	305
Module Types	306
Module Options	307
Creating Modules	307
Creating Modules Via Package	307
Creating Modules Via Duplication	308
Modifying Modules	310
Modifying Labels	310
Fields	311
Field Types	311
Field Options	313
Creating Fields	320
Editing Fields	321
Deleting Fields	323
Cloning Fields	324
Relationships	326
Relationship Types	327
Creating Relationships	328
Editing Relationships	330
Deleting Relationships	331
Layouts	332
Layout Types	332
Layout Options	335
Sync And Copy	337
Editing Layouts	337
Mobile Layouts	341
Mobile Layout Types	342
Mobile Layout Options	342
Modifying Mobile Layouts	343
Available Subpanels	344
Subpanel Options	345

Modifying Subpanels	345
Using Sugar Logic	348
Functions	348
Fields	354
Related Field	355
Rollup	355
Viewing Layout History	356
Restoring Layout Defaults	357
Deleting Modules	358
Module Loader	359
Overview	359
Module Loader Layout	359
Module Loader Fields	360
Uploading Packages	361
Installing Packages	362
Uninstalling Packages	363
Workflow Management	364
Overview	364
Workflow Fields	365
Workflow Module Tab	366
Creating Workflows	367
Creating Via Workflow Module	367
Creating Via Duplication	368
Creating Workflow Conditions	369
Creating "After Time Elapsed" Workflow Conditions	370
Creating "When Record Saves" Workflow Conditions	371
Creating Workflow Alerts	371
Creating Workflow Actions	374
Workflow Action Types	375
Viewing Workflows	377
Viewing Via List View	377
Viewing Via Detail View	377
Viewing Via Recently Viewed	377
Searching Workflows	378
Basic Search	378
Advanced Search	379
Workflows List View	380
Pagination	380
Checkbox Selection	380
Column Sorting	381
Workflow Detail View	381
Actions Menu	381
Next or Previous Record	382
Conditions Subpanel	382
Alert Subpanels	383
Actions Subpanel	384

Editing Workflows	384
Editing Via Detail View	385
Editing Via List View	385
Deleting Workflows	385
Deleting Via Detail View	386
Mass Deleting Via List View	386
Workflow Alert Templates	387
Alert Template Fields	387
Creating Alert Templates	388
Creating Alert Templates Via Workflows Module	388
Creating Alert Templates Via Duplication	390
Inserting Variables	391
Viewing Alert Templates	392
Viewing Alert Templates Via List View	392
Viewing Alert Templates Via Detail View	393
Viewing Alert Templates Via Emails Module	393
Editing Alert Templates	394
Deleting Alert Templates	394
Workflow Sequence	395
Products and Quotes	396
Overview	396
Product Catalog	396
Product Catalog Fields	397
Product Catalog Module Tab	399
Creating Products For Catalog	399
Creating Via Product Catalog	400
Creating Via Duplication	400
Importing Products for Catalog	401
Viewing Products In Catalog	402
Viewing Via List View	402
Viewing Via Detail View	402
Viewing Via Recently Viewed	403
Searching Product Catalog	403
Basic Search	403
Advanced Search	404
Product Catalog List View	405
Pagination	406
Checkbox Selection	406
Actions Menu	406
Column Sorting	407
Product Detail View	407
Actions Menu	408
Next or Previous Record	408
Editing Products	408
Editing Via Detail View	409
Editing Via List View	409

Deleting Products	409
Deleting Via Detail View	410
Mass Deleting Via List View	410
Exporting Products	411
Mass Updating Products	411
Product Categories	412
Product Category Fields	412
Product Category Module Tab	413
Creating Product Categories	413
Importing Product Categories	414
Product Categories List View	415
Column Sorting	415
Ordering Product Categories	416
Editing Product Categories	416
Deleting Product Categories	417
Product Types	417
Product Type Fields	417
Product Types Module Tab	418
Creating Product Types	419
Importing Product Types	420
Product Types List View	420
Column Sorting	421
Ordering Product Types	421
Editing Product Types	421
Deleting Product Types	422
Manufacturers	422
Manufacturers Fields	422
Manufacturers Module Tab	423
Creating Manufacturers	424
Importing Manufacturers	424
Manufacturers List View	425
Column Sorting	425
Ordering Manufacturers	426
Editing Manufacturers	426
Deleting Manufacturers	426
Shipping Providers	427
Shipping Provider Fields	427
Creating Shipping Providers	427
Shipping Providers List View	428
Column Sorting	428
Ordering Shipping Providers	429
Editing Shipping Providers	429
Deleting Shipping Providers	429
Tax Rates	430
Tax Rate Fields	430
Tax Rates Module Tab	430

Creating Tax Rates	431
Importing Tax Rates	431
Tax Rates List View	432
Column Sorting	432
Ordering Tax Rates	433
Editing Tax Rates	433
Deleting Tax Rates	433
Bug Tracker	434
Overview	434
Release Fields	434
Release Module Tab	435
Creating Releases	435
Viewing Releases	436
Viewing Via Module	436
View Via Recently Viewed	437
Editing Releases	437
Deleting Releases	438
Forecast Configuration	439
Overview	439
Setting the Fiscal Year	439
Setting the Time Periods	440
Creating the Forecast Schedule	440
Contract Types	441
Overview	442
Contract Type Fields	442
Contract Types Module Tab	442
Creating Contract Types	443
Viewing Contract Types	444
Viewing Via List View	444
Viewing Via Detail View	444
Viewing Via Recently Viewed	444
Searching Contract Types	445
Basic Search	445
Advanced Search	446
Contract Types List View	446
Pagination	447
Checkbox Selection	447
Actions Menu	448
Column Sorting	448
Contract Types Detail View	449
Documents Subpanel	449
Editing Contract Types	449
Editing Via List View	450
Ordering Contract Types	450
Deleting Contract Types	450
Mass Deleting Via List View	450

Exporting Contract Types	451
Employee Records	452
Overview	452
Employee Fields	452
Employees Module Tab	453
Creating Employees	454
Creating Via Employees Module	454
Creating Via Users Module	455
Creating Via Duplication	455
Viewing Employees	456
Viewing Via List View	456
Viewing Via Detail View	456
Viewing Via Recently Viewed	456
Searching Employees	457
Basic Search	457
Advanced Search	458
Employees List View	459
Pagination	459
Checkbox Selection	460
Actions Menu	460
Column Sorting	461
Employees Detail View	461
Next or Previous Record	461
Editing Employees	462
Editing Via Detail View	463
Editing Via List View	463
Deleting Employees	463
Exporting Employees	464
Mass Updating Employees	464
Knowledge Base Administration	465
Overview	465
Admin Actions Menu	466
Tag Tree	466
Nested Folders	467
Checkbox Selection	467
Articles List View	468
Pagination	468
Checkbox Selection	469
Column Sorting	469
Edit Button	469
Creating New Tags	470
Deleting Tags	471
Renaming Tags	472
Moving Selected Articles	473
Applying Tags To Articles	474
Deleting Selected Articles	475

Enabling Search on MSSQL	476
Advanced Configuration Options	477
Overview	477
System Configuration	477
Configuring File Permissions	478
Allowing POP Email Accounts	479
Security Options	479
Locking Down Admin Control	479
Locking Down Module Loader	480
Locking Down Backups	480
Enabling Sites as Referers	481
Performance	481
Recommended Server Settings	481
Limiting System Resources	482
Changing the Upload Directory	482
Changing the Cache Directory	483
Configuring Count Queries	483
Disabling Related Calculation Fields	484
Disabling Automatic Searches	484
Using a Custom Page For Campaign Trackers	485

Sugar Corporate 6.5 Administration Guide

This guide describes options that enable Sugar administrators to configure the application to meet their organization's requirements.

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Introduction

Overview

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

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

Core Admin Features

- [User](#), [Password](#), [Team](#), and [Role](#) management to manipulate user access
- [Email](#) management to configure incoming and outgoing system email accounts and behaviors
- [System](#) management to control functional aspects and system-wide preferences within Sugar
- [Studio](#) to tailor existing modules to your organization's needs by adding or modifying fields, relationships, and layouts
- [Module Builder](#) to create new, custom modules as needed to fully match your organization's processes
- [Sugar Portal](#) management to configure the functionality and appearance of Sugar Portal for your organization's client's usage

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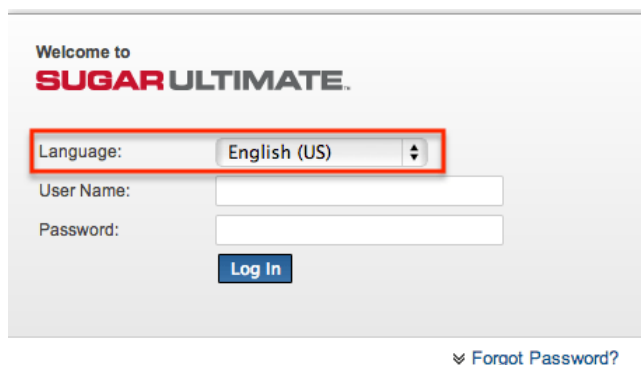
Admin Wizard

Overview

Sugar offers administrators a wide range of configuration options to set up their instance according to their organizations needs and processes. The Admin Wizard allows you to configure the most common system-wide settings (e.g. your company logo, system locale settings, outbound mail configuration, etc.) when first logging into Sugar. Please note that you can skip the steps if you would like to configure these settings via Admin > System Settings, Admin > Locale, and Admin > Email Settings. This documentation will cover the various options available when first setting up your system via Admin Wizard as well as setting up some of your personal settings.

Login Screen

The Sugar login screen is where you enter your login credentials (user name and password) to access your instance. Enter in your instance URL (e.g. <https://example.sugarondemand.com>) on your web browser to load Sugar's login screen. If you do not know your instance URL or login credentials, please reach out to another system administrator in your organization for assistance. The Admin Wizard will launch upon your first successful log in to Sugar allowing you to configure various system-wide settings as well as some personal settings.



Language

The Language dropdown list on the login screen allows users to select the primary language they want displayed in Sugar. The out-of-the-box default language in Sugar is English (US), but administrators can change the default language globally via Admin > Locale. For more information on configuring the default language in

Sugar, please refer to the [Locale](#) section of the System documentation. Once the default language is changed, it will display as the default selection on the login screen for all user's. Please note that you will need to select the language you want displayed each time you log in or the default language will display in Sugar. Administrators can also configure what languages are available to select in the Language dropdown list via Admin > Languages. For more information on managing the available languages, please refer to the [Languages](#) section of the System documentation.

The following languages are available to display in Sugar:

- Albanian
- Bulgarian
- Catalan
- Chinese
- Croatian
- Czech
- Danish
- Dutch
- English (US)
- English (UK)
- French
- German
- Greek
- Hungarian
- Italian
- Japanese
- Korean
- Latvian
- Lithuanian
- Norwegian
- Polish
- Portuguese
- Romanian
- Russian
- Spanish
- Slovak
- Swedish
- Turkish

Branding

The Branding step is where you can provide the system name for your organization and upload a company logo to brand your Sugar account. By default, SugarCRM's

name and company logo is displayed in your instance. Administrators can update the system name and upload a new logo via Admin > System Settings as well if it needs to be updated at a later time. For more information on uploading logos into Sugar, please refer to the [System Settings](#) section of the System documentation.

The following options are available to configure the branding for Sugar:

- Name : Enter in the system name (e.g. ABC, Inc.) you would like displayed in the web browser tab.
- Select Logo : Choose the image file (.png or .jpg) containing your organization's logo to upload to Sugar.
 - The maximum height allowed is 17px with 450px for the maximum width.
- Current Logo : The uploaded logo will appear here and will be displayed in the left-hand corner of the footer of Sugar.

Once your organization's system name and logo is entered, click "Next".

Branding

Provide your organization's name and logo in order to brand your Sugar.

Name:

Select Logo: No file chosen

Current Logo:

< Back

System Locale Settings

The System Locale Settings step is where you can specify how you would like the data in Sugar displayed based on your geographical location. Please note that the locale settings you specify here will be the default setting for your entire Sugar instance. Administrators can change the system locale settings via Admin > Locale at a later time if desired. For more information on configuring the system locale, please refer to the [System](#) documentation. Each user in Sugar has the option to change these default locale settings based on their current geographical location

under user preferences. For more information on configuring locale settings in user preferences, please refer to the [Locale Settings](#) section of the Getting Started documentation.

The following options are available to configure the system locale settings:

- Date Format : Select the format you want the date stamps displayed in Sugar.
- Time Format : Select the format you want the time stamps displayed in Sugar.
- Language : Select the default language you want displayed in Sugar.
- Currency : Enter in the name for the default currency (e.g. "Euro").
- Currency Symbol : Enter in the corresponding symbol for the currency (e.g. "€").
- ISO 4217 Currency Code : Enter in the ISO code for the currency (e.g. "EUR").
- 1000s Separator : Enter the default character used to separate numeric values in the thousands.
- Decimal Symbol : Enter the default character used as the decimal symbol.
- Name Format : Select the format you want the concatenated name fields displayed in Sugar's list view and detail view.

Once the appropriate system locale information is entered, click "Next".

System Locale Settings

Specify how you would like data in Sugar to be displayed, based on your geographical location. The settings you provide here will be the default settings. Users will be able set their own preferences.

Date Format: 12/23/2010 Time Format: 11:00pm

Language: English (US)

Currency: US Dollars Currency Symbol: \$

ISO 4217 Currency Code: USD 1000s Separator: ,

Decimal Symbol: .

Name Format: Dr. David Livingstone

< Back **Next >**

SMTP Server Specification

The SMTP Server Specification step is where you can configure the outbound mail server for the system. The mail server configuration handles outbound emails that

the system generates, such as password resets, scheduled reports, workflow alerts, etc. Please note that administrators can configure the outbound mail server via Admin > Email Settings as well. For more information on setting up the system email settings, please refer to the [Emails](#) documentation in the Administration guide.

You will first need to choose your Email provider using the buttons (Gmail, Yahoo! Mail, Microsoft Exchange, or Other) displayed at the top of the screen. Depending on the email provider selected, the options displayed to configure your outbound mail server will change.

The following options are displayed by default to configure the outbound mail server:

- SMTP Server : Enter the web address of the external email server to connect to Sugar.
- SMTP Port : Enter the communication port number used for connecting to the mail server.
- Use SMTP Authentication? : Check this box to connect to the SMTP server using a user name and password. If left unchecked, the SMTP server must accept anonymous connections, which is not recommended.
- Enable SMTP over SSL or TLS? : Select the appropriate option from the dropdown to use Secure Socket Layer, Transport Layer Security, or no encryption when connecting to the mail server.
- SMTP Username : Enter the user name to connect to the SMTP server.
- SMTP Password : Enter the password associated with the user name to connect to the SMTP server.
- Allow users to use this account for outgoing email : Check this box if you would like users to be able to send emails from Sugar using the same outbound mail account. If the option is not selected, users will still be able to use the outbound mail server to send emails by entering their personal mail account information in their user preferences. For more information on setting up the email settings in user preferences, please refer to the [Email Settings](#) section of the Getting Started documentation.

SMTP Server Specification

Provide the email account that will be used to send emails, such as the assignment notifications and new user passwords. Users will receive emails from Sugar, as sent from the specified email account.

Choose your Email provider:

<input type="button" value="Gmail"/>	<input type="button" value="Yahoo! Mail"/>	<input type="button" value="Microsoft Exchange"/>	<input type="button" value="Other"/>
SMTP Server:	<input type="text"/>	SMTP Port:	<input type="text" value="25"/>
Use SMTP Authentication?	<input checked="" type="checkbox"/>	Enable SMTP over SSL or TLS?	<input type="button" value="-none-"/>
SMTP Username:	<input type="text"/>		
SMTP Password:	<input type="text"/>		
Allow users to use this account for outgoing email:	<input type="checkbox"/>		
<input type="button" value="Clear"/>	<input type="button" value="Send Test Email"/>		

Once the appropriate mail server information is entered, you can send a test email to make sure it is configured properly. Click "Send Test Email", enter your email address, and send the test. If you do not receive the test email, re-enter the account information including the password to ensure it is all correct.

Click "Continue" to proceed to the User Wizard where you can configure some of your personal settings. Please note that every user in Sugar will be prompted to go through the User Wizard upon their first successful log in, but they can forgo the steps if they wish to configure the settings in their user preferences. For more information on configuring your user preferences, please refer to the [User Preferences](#) section of the Getting Started documentation.

Your Information

Once the Admin Wizard is completed, you will have the option to configure some of your personal settings via the User Wizard. The Your Information step is where you can enter key information (i.e. name, email address, phone, physical address, and IM name) about yourself to be stored in your user profile. Please note that the information you provide on this step can be updated in your user preferences at a later time if desired. For more information on configuring your personal information under user preferences, please refer to the [User Profile Tab](#) section of the Getting Started documentation.

The following options are available to configure your user profile:

- First Name : Enter your first name.
- Last Name : Enter your last name.
- Email Address : Enter your email address.
- Office Phone : Enter your office number.
- Mobile : Enter your mobile number.
- IM Type : Select the instant message client (i.e. MSN, Yahoo!, AOL, None) you use, if applicable.
- IM Name : Enter your screen name associated to the selected instant message client.
- Primary Address : Enter your primary street address.
- City : Enter your primary city.
- State : Enter your primary state.
- Postal Code : Enter your primary postal code.
- Country : Enter your primary country.

Your Information

Provide information about yourself. The information you provide about yourself will be visible to other Sugar users. Fields marked with * are required.

First Name:	<input type="text"/>	Last Name: *	<input type="text" value="Administrator"/>
Email Address: *	<input type="text"/>	IM Type:	<input type="text" value="-none-"/>
Office Phone:	<input type="text"/>	IM Name:	<input type="text"/>
Mobile:	<input type="text"/>	State:	<input type="text"/>
Primary Address:	<input type="text"/>	Country:	<input type="text"/>
City:	<input type="text"/>		
Postal Code:	<input type="text"/>		

< Back

Next >

Please note that all required fields are marked with a red asterisk and must be completed prior to moving to the next step of the wizard. Once your personal information is entered, click "Next".

Your Locale

The Your Locale step is where you can configure the date, time, currency, and name format you want displayed in Sugar based on your current geographical location. Unlike the [system locale settings](#), this is where you can specify how you would like data displayed in your specific user account. Please note that the information you provide on this page will override the system locale settings and

can be updated in your user preferences at a later time if desired. For more information on configuring your locale settings, please refer to the [Locale Settings](#) section of the Getting Started documentation.

The following options are available to configure your locale settings:

- Time Zone : Select the time zone based on your current location.
- Date Format : Select the format you want the date stamps displayed in Sugar.
- Time Format : Select the format you want the time stamps displayed in Sugar.
- Currency : Select the default currency you want displayed in Sugar.
- Currency Significant Digits : Select how many digits will appear after the decimal symbol for currencies.
- Decimal Symbol : Enter the default character used as the decimal symbol.
- 1000s separator : Enter the default character used to separate numeric values in the thousands.
- Name Display Format : Select the format you want the concatenated name fields displayed in Sugar's list view and detail view.

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

Your Locale

Specify your time zone and how you would like dates, currencies and names to appear in Sugar.

Time Zone: *i* America/Los Angeles (GMT-8:00) ▾

Date Format: *i* 12/23/2010 ▾ Time Format: *i* 11:00pm ▾

Currency: *i* US Dollars : \$ ▾

Currency Significant Digits: 2 ▾ Example: \$123,456,789.00

Decimal Symbol: *i* . 1000s separator: *i* ,

Name Display Format: *i* Dr. David Livingstone ▾

< Back Next >

The following page confirms that you are ready to use Sugar and allows you to perform various administrative functions (e.g. importing data, creating users, configuring the application via Studio, etc.). Selecting the action item(s) will take you directly to the specific area of the Admin page to create new users, import data from external sources, etc. Please note that you can click "Finish" to go directly into your Sugar account if you wish to configure these settings at a later time.

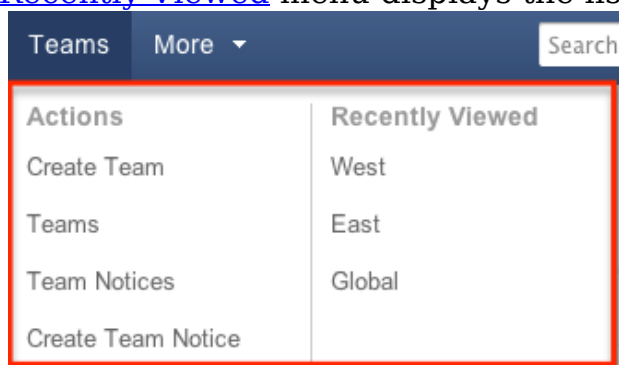
Team Management

Overview

Team Management is used in Sugar to define permissions and groupings for users. These permissions cover what records a user is and is not able to access. Teams are used in conjunction with [Roles](#) to form a robust security model for non-admin users in Sugar. Users can use team settings on specific records to allow different users within Sugar the option to view these given records. Team settings can also be used as a form of organization, thereby separating records to be associated to specific teams for better tracking. Teams can be based on departments, geographic regions, or whatever else works best in a given organization.

Teams Module Tab

The Teams module tab is accessed by navigating to the Admin menu and clicking on Team Management under the Users panel. Clicking on the Team Management link will bring you to the Teams list view and show the Teams module tab. You may hover on the tab to display the Actions and Recently Viewed menus for Teams. The Actions menu allows you to perform important actions within the module. The [Recently Viewed](#) menu displays the list of teams you last viewed in the module.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Team	Opens the edit view to create a new team
Teams	Opens the list view layout to search and display teams

Team Notices	Opens the list view layout to display or delete team notices
Create Team Notice	Opens the edit view to create a new team notice

Team Types

From an administrative standpoint, teams will be handled differently based on their types. From a user standpoint, all teams will be treated pretty much the same. Each team type has their own special set of characteristics that aid in defining it. The team types defined as:

- [The Global Team](#)
- [Standard Teams](#)
- [Private Teams](#)

The Global Team

The Global team is created automatically when a Sugar instance is created. Global is the default team for all new users, and every user is a member of the team by default. Global is a universal team, so any records associated to the global team will be viewable by the users on this team. The global team is intended to be available for all users and a shared team for all users in Sugar.

Note: You cannot delete the Global team.

Standard Teams

Standard Teams can be created by administrators via Team Management. These are to be used throughout Sugar to organize and grant access on organizational specifics to your organization. Standard teams are often broken out into groups by departments, geographical regions, or duties. For example, you may have an East and West team, and also a Sales and Support team.

Private Teams

Private teams are created for every user as part of the process when the user is created. Private teams are meant to be associated to private records that only the user and his or her superiors have access.

Note: Private teams are not deleted in the same method as other teams. For more information on deleting private teams, please review the [Deleting Teams](#) section of this guide.

Team Membership Types

Team memberships are given to users in one of two ways, either by explicit or implicit membership. Regardless of the type, membership will control what records [regular users](#) are able to see. Each membership can be granted in different ways and can constitute different functionality. Team membership is represented in the team's [detail view](#) , as well as the user's [detail view](#) .

Note: Administrators do not adhere to team security and therefore can see all records.

Explicit team membership is forged when the relationship is defined from either the team's or user's detail view. In addition, explicit relationships are also represented with [private team](#) memberships. Explicit memberships, other than private teams, can be [removed](#) as necessary from the team's or user's detail view. Explicit memberships will also include membership functionality for actions such as [workflows](#) or [inbound email](#) .

Implicit team membership is used for record visibility. Implicit membership relies on the "Reports To" field in the [User Profile](#) . When one user reports to another, the heirarchy of the "Reports To" field is kept in tact. The user being reported to will inherit the team membership of the subordinate user and be able to see any records on both his or her own team, and the teams of which the subordinate user is a member . The subordinate's teams can either be explicit or implicit teams in this scenario.

Note: Implicit relationships cannot be removed, but the cause for their relationship can be broken by changing the reporting heirarchy.

In the Team's detail view, the user's subpanel will showcase which relationships are explicit and which are implicit. In the "Membership" column of the Users subpanel, the user will either be marked as a "Member", meaning that they are an explicit member, or "Member Reports-to", meaning they are an implicit member. In addition, the users marked with the "Member Reports-to" will not include a "Remove" button, as they have another user (or users) reporting to them on this team.

Users

Name	User Name	Membership	Email	Phone
Jim Brennan	jim	Member Reports-to	jim@sugar.com	
Will Westin	will	Member	will@sugar.com	

The image shows a user management interface with a table of users. The 'Membership' column for 'Jim Brennan' is highlighted with a red box. A 'remove' button is also highlighted with a red box in the bottom right corner of the table area.

Creating Teams

There are two methods that can be used to create teams in Sugar. These are via the Teams module tab's action list or by duplicating an existing team and then editing it. After initially creating the team, the administrator will need to associate users to the [newly created team](#) .

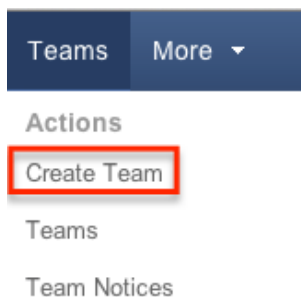
For information on creating Private Teams, please review the [Repairing Teams](#) section of this documentation.

Creating Via Teams Module

The most common way to create a new team is via the Create Team option in the Team Management [module tab](#) . This opens up the edit view layout which allows you to enter in all the relevant information for the team.

Use the following steps to create a team via Team Management:

1. Navigate to Admin > Team Management.
2. The Teams list view will open displaying all existing teams that are currently available. Hover over the "Teams" module tab that is now available and click on "Create Team".



3. Enter a name and description of the team on the edit view screen that you are now presented with. Once this is complete, click Save.

-
4. On the team's detail view, [add users](#) that are members of this team.

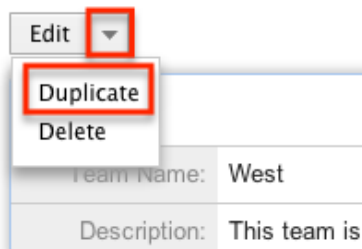
Creating Via Duplication

You can also create a new team by duplicating an existing team. The duplicate option is useful if the team you are creating has a similar set of members or a similar description to an existing team

Use the following steps to create a team by duplicating an existing record:

1. Navigate to a team record's detail view.
2. Click the Actions menu and select "Duplicate".

Teams: West

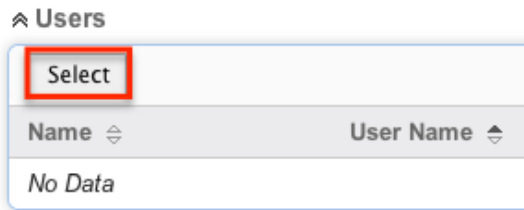


3. The displayed edit view is pre-populated with the original team's values. Update the name field, and description if need be, then click "Save".
4. On the team's detail view, [add any users](#) that are members of this team that are not on the original team, and [remove](#) any unwanted users.

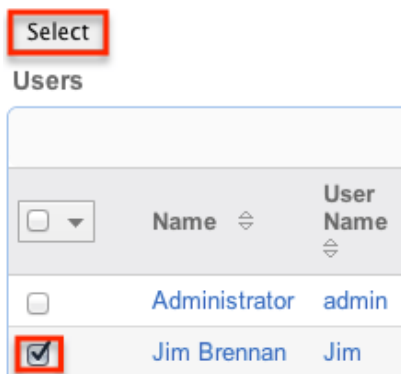
Adding Users to Teams Via Teams Module

A user has to be associated to a team to be able to view records that are associated to the specific team. Assigning a team is much like any other many to many relationship in Sugar, where many users can be associated to one particular team, and one user can also be assigned to multiple teams. From Team Management, a user can be associated to a team via the Users subpanel at the bottom of the detail view. To associate users to a team, follow the following steps:

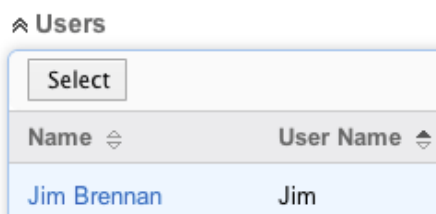
1. Navigate to Admin > Team Management
2. From the Teams listview, select the team that you are working with
3. At the bottom of the page, click "Select User" from the Users subpanel



4. Use the popup search menu to search for and select the user(s) you would like to add to this team where you can either click on the user's name or, if selecting multiple users, click their corresponding checkboxes and then click "Select"



5. After selecting the user(s) the popup search box will close and the user(s) will now be displayed in the Users subpanel for the team to complete the relationship

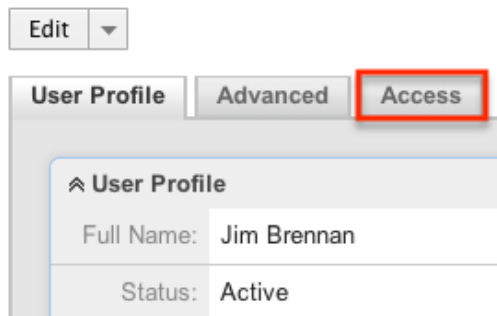


Adding Users to Teams Via Users Module

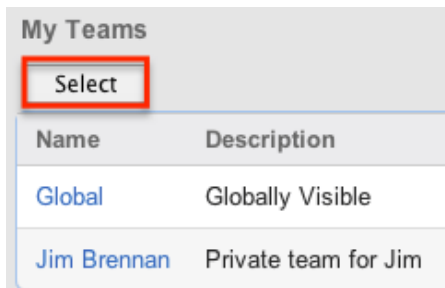
A regular user must be associated to a team to be able to view records that are associated to that team. Assigning a team is much like any other many to many relationship in Sugar, where many users can be associated to one particular team, and one user can also be assigned to multiple teams. From User Management, a user can be associated to a team via the user's detail view. For more information on User Management, please refer to the [User Management](#) documentation. To associate a team to a user via User Management, follow the following steps:

1. Navigate to Admin > User Management

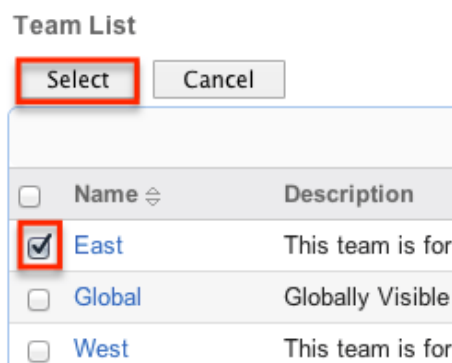
-
- From the Users list view, open the user record that you would like to edit
 - From the user's detail view, click on the "Access" tab



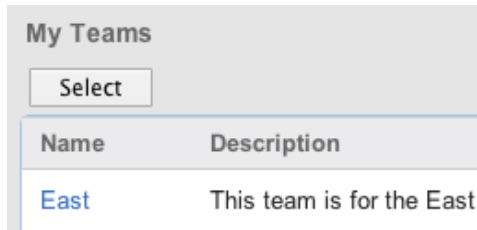
- Scroll past the role chart to the "My Teams" subpanel and click "Select"



- Use the popup search menu to search for and select the team(s) you would like to add to this user where you can either click on the team's name or, if selecting multiple teams, click their corresponding checkboxes and then click "Select"



- After selecting the team(s) the popup search box will close and the team(s) will now be displayed in the My Teams subpanel for the user to complete the relationship



My Teams	
Name	Description
East	This team is for the East

Viewing Teams

There are various options available for viewing team records in Sugar including via the Teams list view, Teams detail view, Teams Last Viewed menu, from dashlets, and from reports.

Viewing Via List View

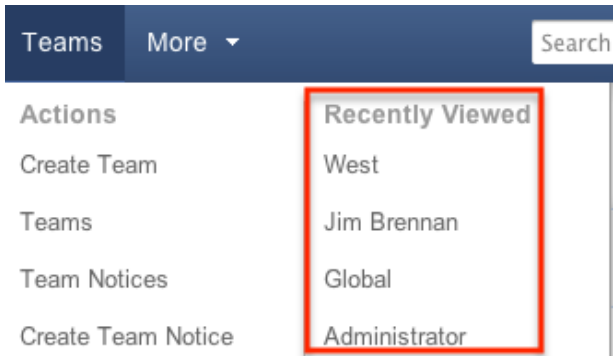
The Teams list view displays all team records meeting the current search criteria. To access the list view, simply navigate to Admin > Team Management. Alternately, if you are looking at a team's detail view, you can click the Teams module tab to return to the list view. You can click the team's name to open the record in detail view. For more information on viewing teams via list view, please refer to the [Teams List View](#) to list view section of this documentation.

Viewing Via Detail View

The Teams detail view displays thorough team information showing the name and description of the team, followed by a subpanel of the users associated to the team. The detail view can be reached by clicking a team's link from anywhere in the application including from the Teams list view. For more information on viewing teams via detail view, please refer to the [Teams Detail View](#) section.

Viewing Via Recently Viewed

As you access different teams, Sugar will keep track of which teams you have recently viewed. Hover on the Teams [Teams Module Tab](#) to see a list of your most recently viewed teams and click each name to open the team in detail view.



Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets which allow users to get a quick view of various records, activities, reports, etc. You can view team information in most module specific dashlets. Clicking a team's name from any dashlet will open the team in detail view. For more information on using dashlets, please refer to the [Dashlets](#) section of the Home documentation.




The screenshot shows the 'My Calls' dashlet. The 'Team' column is highlighted with a red box, showing 'East' and 'West+'.

Close	Subject	Related to	Start Date	Accept?	Team
	Discuss review process	XY&Z Funding Inc	03/18/2014 12:15pm		East
	Bad time, will call back	Avery Software Co	03/03/2014 02:15am		West+

Viewing Via Reports

Administrators have the option to build, run, and manage reports to gather key data from records within Sugar. When building a report, there are options to either run the report from the Teams module or add links to teams related to the records that are being reported on. Once the report is run, you will be able to view the team record's detail view by clicking the team's name in the report results. Please note that you can only directly access team detail views with Rows and Columns and Summation with Details-type reports as Summation and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the [Reports](#) documentation.

Name: Teams report
Modules: Teams, Teams > Users
Display Columns: Primary Team Name, Private, Description, User Name
Schedule: None
Filters: None

Primary Team Name ⇅	Private ⇅	Description
Administrator 	<input checked="" type="checkbox"/>	Private team for admin
Jim 	<input checked="" type="checkbox"/>	Private team for Jim
Global 	<input type="checkbox"/>	Globally Visible

Searching Teams

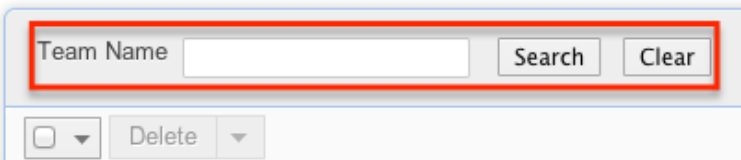
The Teams list view search function searches for the name of the team to help you locate records easily and effectively. Once the search is performed, the relevant results will be displayed in the Teams list view below.

The buttons in the search panel have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search
- Clear : Click the Clear button to clear all criteria from the searchable fields

To see all Team records, simply click "Clear" and then "Search" to perform a blank search with no name filter.

Search Teams



Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %Administrator). This will pull up any record that has the word "administrator" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used, please refer to the [Search](#) documentation.

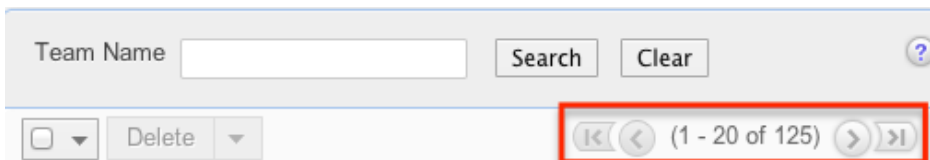
Teams List View

The Teams list view displays all teams meeting the current search criteria, if any. You can view the name and description of each team within the field columns. Click on the name of the team to access the [detail view](#) for the team and review the settings further.

Pagination

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

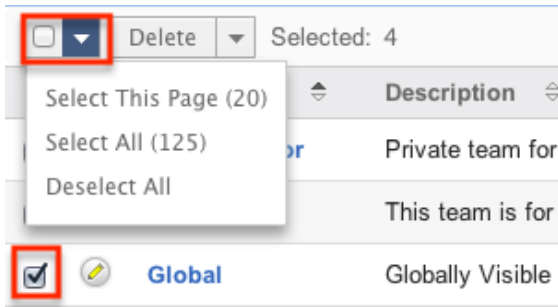
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.



Checkbox Selection

Teams can be deleted in a mass-delete fashion via the list view by selecting all of the team records. To select individual team records on the Teams list view, mark the checkbox on the left of each row. To select or deselect multiple teams on the list view, use the options in the checkbox dropdown menu:

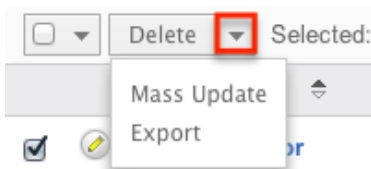
- Select This Page : Selects all records shown on the current page of results
- Select All : Selects all records in the current search results across all pages of results
- Deselect All : Deselects all records that are currently selected



For more information on deleting teams, please refer to the [Deleting Teams](#) section of this documentation.

Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.

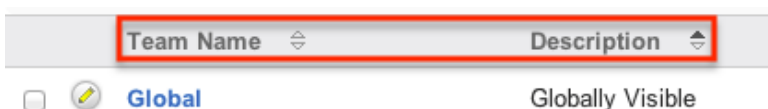


The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Delete	Delete one or more teams at a time
Mass Update	Mass update one or more teams at a time
Export	Export one or more teams to a CSV file

Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header for either "Name" or "Description". The list view may be sorted by only one column at a time.

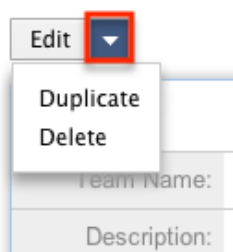


Teams Detail View

The Teams detail view displays thorough information about the team, as well as the ability to perform most actions related to team management. The detail view also includes a Users subpanel where users can be associated to the team and will therefore take on the team's properties.

Actions Menu

The Actions menu on the top left of each team's detail view allows you to perform various actions on the current record. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the [System](#) documentation in the Administration guide.



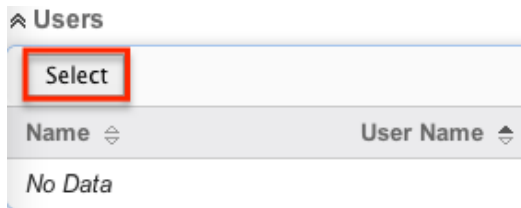
The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Edit	Edit the name and description of this team
Duplicate	Duplicate this team to create a new team
Delete	Delete this team

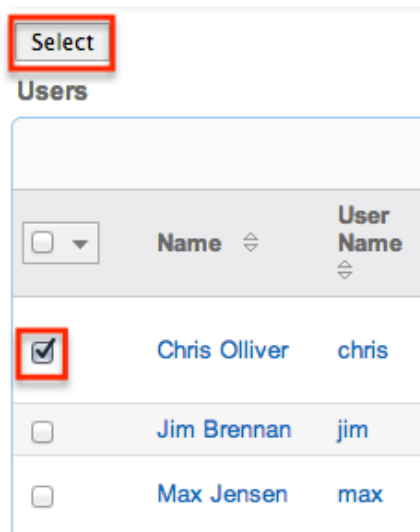
Users Subpanel

A user has to be associated to a team to be able to take on the team's membership settings. Assigning a user is much like any other many to many relationship in Sugar, where many users can be associated to one particular team, and one user can also be assigned to multiple teams. From Team Management, a user can be associated to a team via the Users subpanel at the bottom of the page. To associate uses to a team, follow the following steps:

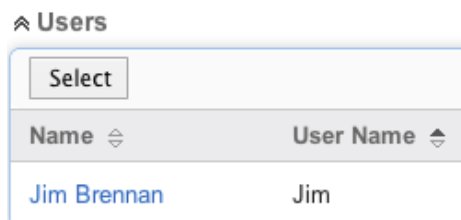
1. Navigate to the detail view of the team that you would like to edit.
2. At the bottom of the page, click "Select User" from the Users subpanel



3. Use the popup search menu to search for and select the user(s) you would like to add to this team. You can either click on the user's name or, if selecting multiple users, click their corresponding checkbox and then click "Select"



4. After selecting the user(s) the popup search box will close and the user(s) will now be displayed in the Users subpanel for the team to complete the relationship

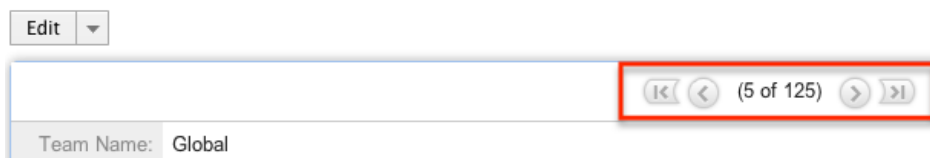


Next or Previous Record

On the upper right of the Teams detail view, there are two buttons that allow you to page through each team in the Teams list view's current search results. Clicking the Previous button displays the previous team of the current search results while

clicking the Next button displays the next team of the current search results. The text in between shows which team result you are currently viewing within the total number of current results.

Teams: Global



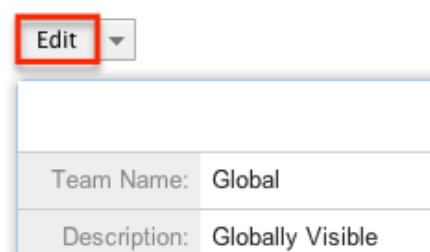
Editing Teams

Teams may be edited at any time to update or add information to the record or to edit existing information. You can make changes to existing team records via the Teams detail view and edit view, or from the Users module. Edit view is available within the Teams module and includes the Name and Detail fields.

Editing Via Detail View

You can edit teams via the detailview by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update either the Name or Description fields, then click "Save" to preserve the changes made.

Teams: Global



Editing Via List View




You can edit teams via the list view by clicking the Pencil icon to the left of each team's name. After clicking the pencil, the window will move to the edit view. Update the necessary fields, then click "Save" to preserve the changes. After saving from the edit view, you will be returned to the detail view for the record that you just updated. Because this method brings you to the edit view, the Name and Description fields can be updated.

	Team Name	Description
<input type="checkbox"/>	Global	Globally Visible

Editing Via Users Module

The users module allows you to see all of the teams associated to a specific user in one place under the "Access" tab. The page will show the "My Teams" subpanel with a list of all of the teams associated to the user. For more information about viewing the teams from the Users module, please review the [User Management](#) documentation.

On the "My Teams" subpanel, there is an option to edit the team. After clicking the "Edit" button, the window will move to the edit view. Update the necessary fields, then click "Save" to preserve the changes. After saving from the edit view, you will be returned to the detail view for the record that you just updated. Because this method brings you to the edit view, only the Name and Description fields can be updated.

My Teams		
<input type="button" value="Select"/>		
Name	Description	
Administrator	Private team for admin	 edit
Global	Globally Visible	 edit  remove

Deleting Teams

If a team record is invalid or is no longer being used in your organization's Sugar instance, it may be deleted from either the Teams detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting team records will not delete any related user records and will only remove the relationship.

The exception to this is found when trying to delete any [private teams](#) . Private teams are only able to be deleted when the user that the team is for has been deleted. To delete a private team, first delete the user via the user's detail view, following the steps from [User Management](#) .

Deleting Via Detail View

Use the following steps to delete a team via the detail view:

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

Teams: Jim Brennan

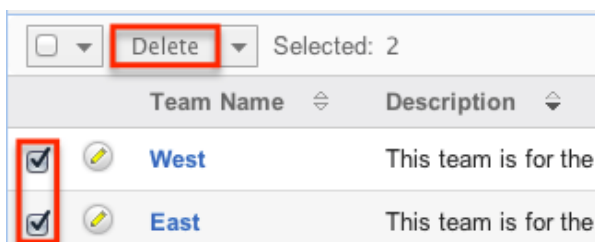


3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Deleting Via List View

Use the following steps to delete one or more teams via the list view:

1. Navigate to the Teams list view by navigating to Admin > Team Management.
2. Use the [Search](#) functionality to search to find the Team records you wish to delete.
3. Select the desired team records individually or using the [checkbox dropdown's options](#).
4. Choose "Delete" from the Actions menu.



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

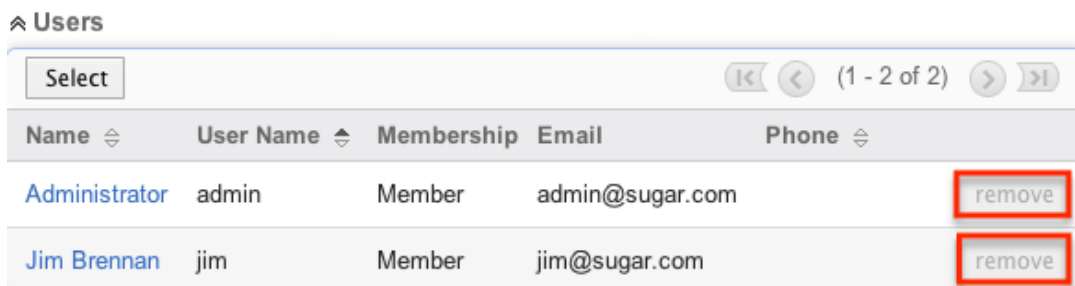
Due to PHP memory limitations on the server, there may be occasions when the application times out while deleting a large number of team records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Removing Users From Teams

Users can be associated to multiple teams, and one team can also be associated to many users. As changes occur within an organization, there may be times that users need to be removed from specific teams. Breaking the relationship between a team and a user can be done both from the Teams detail view and from the Users detail view. Both modules include a subpanel to represent the relationship to the other module.

To remove a user from a team, use the following steps:

1. Navigate to the team record's detail view
2. Click "Remove" to the right of the user's row

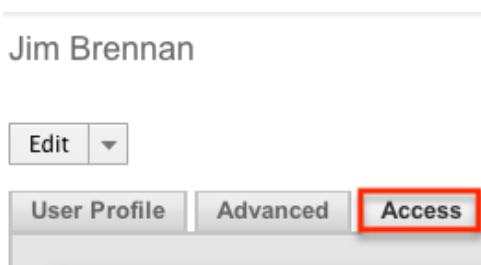


Name	User Name	Membership	Email	Phone
Administrator	admin	Member	admin@sugar.com	remove
Jim Brennan	jim	Member	jim@sugar.com	remove

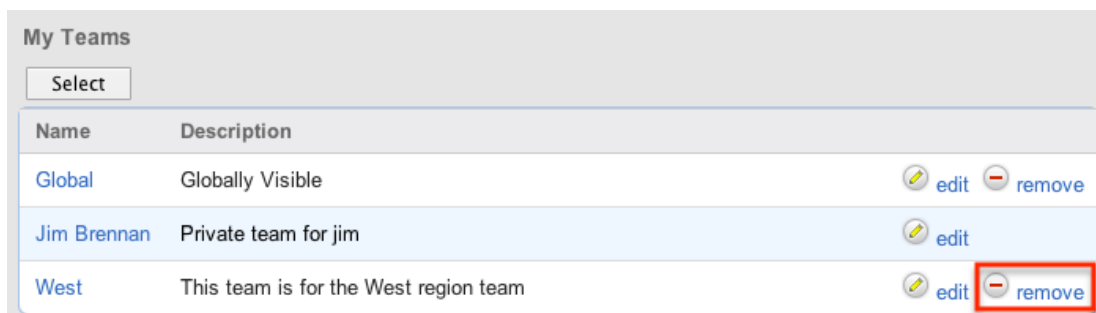
3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

To remove a team from a user, use the following steps:

1. Navigate to the user's detail view
2. From the user's detail view, click on the "Access" tab



3. Scroll past the role chart to the "My Teams" subpanel and click "Remove" on the row of the team you would like to remove



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

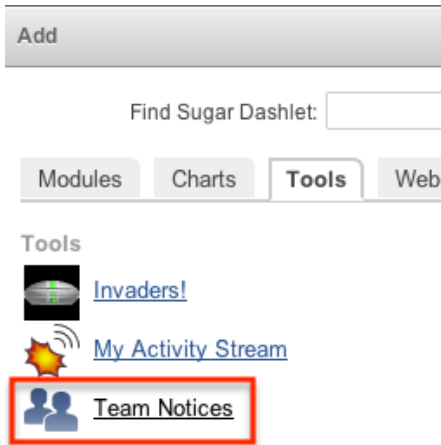
Repairing Teams

Sugar's Repair menu includes two options to administrators to have automated repairs to make improvements to the Team structures and functionality. These processes should not be needed often, and are only used when the necessary changes are to be made. The repair options are as follows:

Type	Description
Upgrade Teams	Checks to make sure that all users have associated private teams
Repair Teams	A combination of four different repair functions to rebuild team accesses

Team Notices

Team Notices is a dashlet that users can place on their home dashboard. This can be configured by administrators to show a scrolling list of announcements to members of specified teams so that they can see announcements whenever they are viewing their dashboard. The Team Notices dashlet is found under the Tools tab of the "Add Sugar Dashlets" menu. For more information on adding dashlets, please review the [Home](#) documentation.



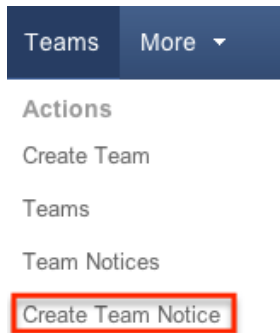
The Team Notices management functionality utilizes the following fields:

Field	Description
Date End	When the broadcasted notice will stop showing for users
Date Start	When the broadcasted notice will start showing for users
Description	Enter in the text of what announcement or notice is being made to the users to show on the dashlet
Status	Select if the notice should be visible or not for users
Team	Select what team(s) should see this message
Title	Enter in a title for the announcement or notice to show on the dashlet
URL	Add a link to another page if necessary Note: You must include http:// or https:// in the URL for the link to redirect properly to the correct page
URL Title	What will show in the dashlet as a clickable link to the defined URL

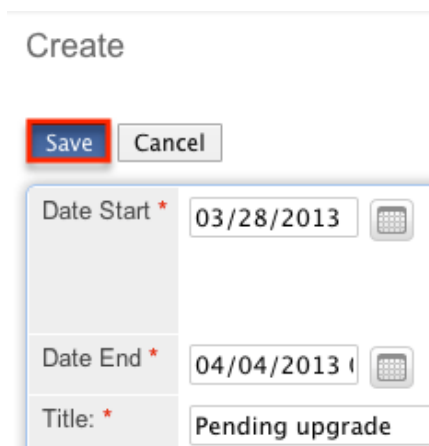
Creating Team Notices

Use the following steps to create a Team Notice:

-
1. Navigate to Admin > Team Management
 2. Hover over the Teams module tab and select "Create Team Notice"

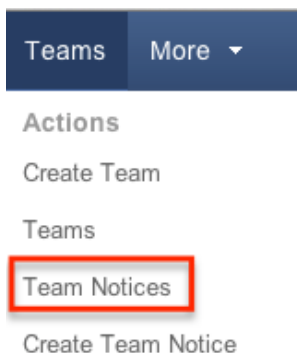


3. Edit all any of the fields as need be, with the required fields being marked with a red asterisk and click "Save"


A screenshot of a 'Create' form. At the top, there are 'Save' and 'Cancel' buttons. Below are three input fields: 'Date Start *' with the value '03/28/2013', 'Date End *' with the value '04/04/2013', and 'Title: *' with the value 'Pending upgrade'. The asterisks indicate required fields.

Managing Team Notices

To review a list of all of your team notices, you can navigate to the Team Notices list view by accessing Team Management via the Admin menu. Once on the Teams list view, hover over the Teams module tab and select "Team Notices" to reach the Team Notices list view.



The team notices list view consists of a sortable list of all of your notices. Column sorting can be performed on any of the columns with arrows next to the column header. Clicking on any Title field, as a blue hyperlink, will bring you to the edit view for the team notice, allowing you to make any necessary updates. Finally, clicking on the "delete" button to the far right of any row will delete that notice from Sugar.

Title ↕	Description	Status ↕	Date Start ↕	Date End ↕	Team ↕	
Pending upgrade	The upgrade will begin on Friday night	Visible	03/28/2013	04/04/2013	Global	

Last Modified: 09/26/2015 06:25pm

Role Management

Overview

Sugar Roles define permissions for users such as what kinds of records they can access and what level of access they are allowed. Roles work in conjunction with [Teams](#) to form a robust security model for non-admin users in Sugar. Roles control three different layers of access for users within Sugar: module, field, and action-level access.

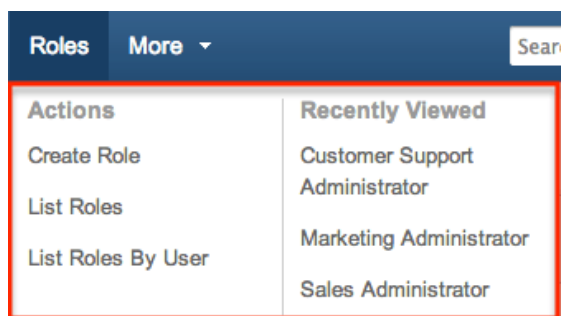
Administrators have the ability to create different roles and assign regular users to the roles. A user can be associated to any number of roles, and when multiple roles or role settings are applied, Sugar adheres to a most-restrictive policy to determine the user's appropriate access levels. Administrators cannot be associated to roles as their administrative rights supersede any restrictions imposed by Role Management. For more information on System Administrator users, please review the [User Management](#) documentation.

Note: The Reports module does not respect certain field-level role restrictions meaning that generated reports may display field data for which a user's role is set to restrict visibility.

Roles Module Tab

The Roles module tab is accessed by navigating to the Admin menu and clicking "Role Management" within the Users panel. Clicking the link will open the Roles module where you may hover on the tab to display the Actions and Recently Viewed menus for Roles. The Actions menu allows you to perform important

actions within the module. The Recently Viewed menu displays the list of roles you last viewed.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Role	Opens the edit view to create a new role
List Roles	Opens the list view layout to search and display roles
List Roles By User	Opens a page for viewing each user's access according to their combined roles

Creating Roles

There are two methods that can be used to create roles in Sugar: via the Create Role option or by duplicating then editing an existing role. After initially creating the role, the administrator will need to set the necessary module and field permissions, and assign users to the role.

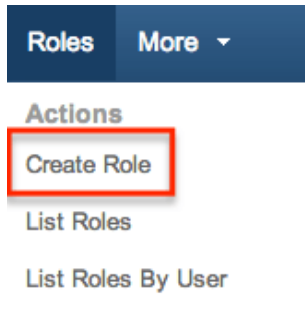
Creating Roles Via Role Management

The most common way to create a role is via the Create Role option in the Role Management module tab. This opens up the edit view layout which allows you to enter in all the relevant information for the role.

Use the following steps to create a role via Role Management:

1. Navigate to the Admin > Role Management.
2. The Roles [list view](#) will open, displaying any existing roles that are currently available. Hover over the "Roles" module tab that is now available and click

on "Create Role".



3. You will be presented with an edit view screen where you will need to enter a name and description of the role you are creating. Once this is complete, click "Save".
4. On the role chart screen, configure the [module](#) and [field permissions](#) , and [assign users to the role](#) .

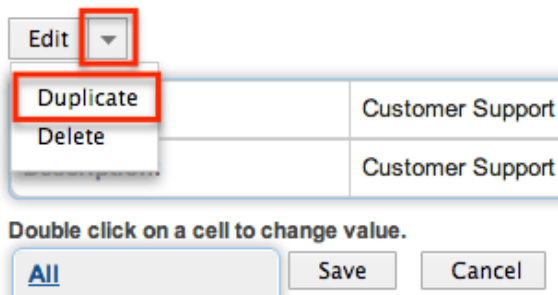
Creating Roles Via Duplication

You can also create a new role by duplicating an existing role. The duplicate option is useful if the role you are creating has similar information to an existing role.

Use the following steps to create a role by duplicating an existing record:

1. Navigate to a role record's detail view.
2. Click the Actions menu and select "Duplicate".

Customer Support Administrator



3. The displayed edit view is pre-populated with the original role's values. Update the necessary fields, then click "Save".
4. On the role chart screen, update the [module](#) and [field permissions](#) , and [assign users to the role](#) .

Setting Module-Level Permissions

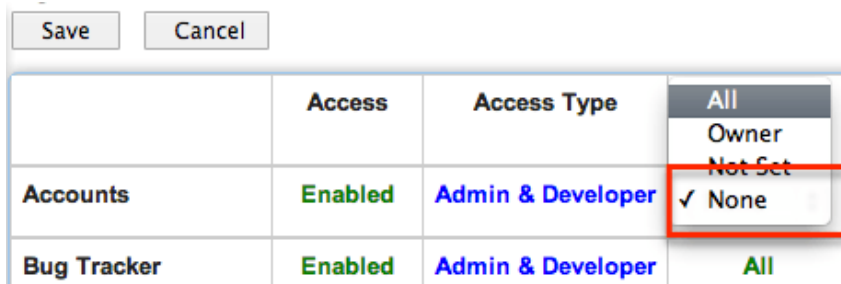
The Role Chart comprises of ten columns and a row for each module down the left hand side. The column each represent a type of action within Sugar, and the

corresponding point between the columns and module roles defines the role's permissions.

	Access	Access Type	Delete	Edit	Export	Import	List	Mass Update	View
Accounts	Enabled	Admin & Developer	None	All	All	None	All	All	All
Bug Tracker	Enabled	Admin & Developer	All	All	All	None	All	All	All

To make changes to a role after it has been created, follow the steps below:

1. Navigate to Admin > Role Management.
2. On the Roles list view, click on the role that you would like to edit.
3. Find the intersection of the action and module you would like to change and click on the square once.
4. A dropdown list will appear giving you the options available for that square.



5. Select the new option that you are changing to.
6. Repeat steps 3-5 on any other fields you would like to change.
7. Click "Save" when complete to secure the changes.

Note: The more restrictive role setting will always take precedence when Sugar has to choose between two settings.

The column headers are explained below:

Column Header	Standard Cell Options	Description
Module (Blank)	N/A	The module for which the change is being made
Access	Enabled Not Set Disabled	Select whether the user should have any access to this module If set to disabled, the user will not see a module tab for the module, any subpanels, or be able to access any records from

		this module
Access Type	Normal Not Set Admin Developer Admin & Developer	This field can grant users the ability to supersede team settings or access some sections of the Admin menu
Delete	All Owner Not Set None	Ability to restrict users from deleting or merging records in Sugar Note: This role affects Merge functionality in Sugar as merges delete existing records that are not rolled up to the primary record
Edit	All Owner Not Set None	Ability to restrict users from editing or creating records in Sugar Note: This role affects the create functionality in Sugar as the processes of creating a record functions like an edit.
Export	All Owner Not Set None	Ability to restrict users from exporting data from Sugar to their local computers Note: For more information on exporting, please review the Export documentation Note: This role affects usage of the Sugar API, which is the framework used for external connections, such as the Outlook Plugin

Import	All Not Set None	Ability to restrict users from importing data into Sugar Note: For more information on importing, please review the Import documentation Note: This role affects usage of the Sugar API, which is the framework used for external connections, such as the Outlook Plugin
List	All Owner Not Set None	Ability to restrict users ability to see records in a list view or subpanel, meaning that the list view will not be available for users where this is set to None
Mass Update	All Not Set None	Ability to restrict users from using the Mass Update functionality in Sugar, meaning that Mass Update will not appear as an option on the list view's Actions menu when this is restricted
View	All Owner Not Set None	Ability to restrict access to the detail view of specific records, meaning that when viewing a list view, the hyperlink to view the record's detail view will not be available and will instead show in plain text

The "Access" column provides the following options:

- Enabled : The user is allowed access to this module
- Not Set : Does not restrict or grant access to this module, defaults to having "Enabled" access when selected

-
- Disabled : The user will not be able to access this module, view any of its records, or see any trace of its existence in Sugar

The "Access Type" column provides the following options:

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

The function specific columns (Edit, Delete, etc.) provide the following options:

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

Setting Field-Level Permissions

In addition to changing the permissions for specific modules, Role Management also provides the option to set permissions and restrictions on specific fields within modules. To change the field-level permissions on a module, follow the following steps:

1. Navigate to Admin > Role Management
2. Select the module you would like to edit the field-level permissions for from the far left list

Edit ▼

Name:

Description:

Double click on a cell to ch

- All
- Accounts
- Bug Tracker
- Calls
- Cases

3. On the next screen, find the field that you would like to restrict access for and click the corresponding permission box

Field Permissions

Type [+]	<input checked="" type="checkbox"/> Not Set <input type="checkbox"/> Read/Write	Annual Revenue [+]	Not Set
Campaign [+]	<input type="checkbox"/> Read/Owner Write <input type="checkbox"/> Read Only	Created By [+]	Not Set
Employees [+]	<input type="checkbox"/> Owner Read/Owner Write <input type="checkbox"/> None	Industry [+]	Not Set
Ownership [+]		Member of [+]	Not Set

4. Select the new option to which you are changing
5. Repeat steps 3 and 4 on any other fields you would like to change
6. Click "Save" when complete to secure the changes
7. To access the full details of the role, click the "All" in the top of module list

Double click on a cell to ch

- All
- Accounts
- Bug Tracker
- Calls
- Cases

The field-level access options are explained below:

- Not Set : Does not restrict or grant access to this field. When permission is "Not Set" the user will default to having "Read/Write" access
- Read/Write : The user will be able to see the value of this field in all views, and be able to make changes to it via the edit view or quick edit
- Read/Owner Write : The user will be able to see the value of this field in all views, but only able to make changes in the edit view or quick edit if he or she is the "Assigned To" user on the record
- Read Only : The user will be able to see this field in all views, but not make

-
- any changes to it
 - Owner Read/Owner Write : The user will only be able to see this field in all views and make changes in the edit view or quick edit if he or she is the "Assigned To" user on the record
 - None : This field will not appear for the user on any layout, and will instead be a blank space

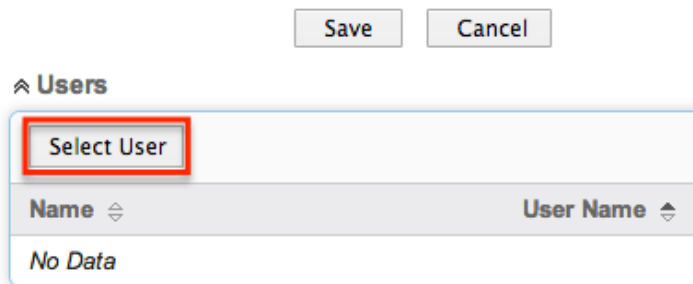
Assigning Users to Roles

A user has to be associated to a role to be able to take on the role's permission settings. Assigning a role is much like any other many to many relationship in Sugar, where many users can be associated to one particular role, and one user can also be assigned to multiple roles.

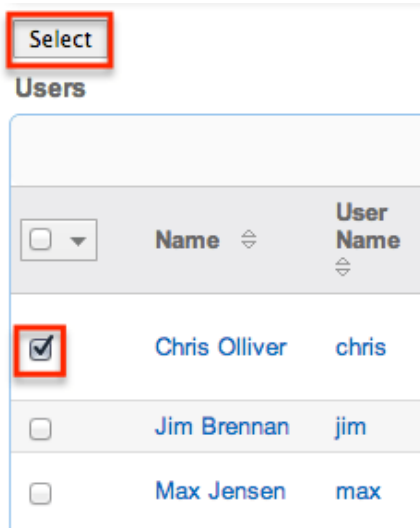
Assigning Via Role Management

From Role Management, a user can be associated to a role via the Users subpanel at the bottom of the detail view. To associate users to a role, follow the following steps:

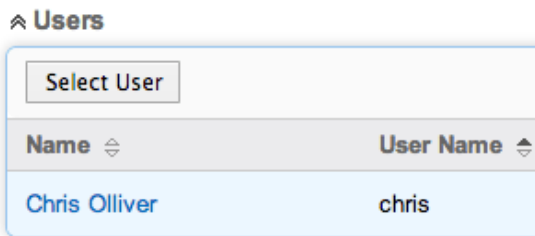
1. Navigate to Admin > Role Management
2. From the Roles list view, select the desired role
3. At the bottom of the page, click "Select User" from the Users subpanel



4. Use the popup search menu to search for and select the user(s) you would like to add to this role where you can either click on the user's name or, if selecting multiple users, click their corresponding checkbox and then click "Select"



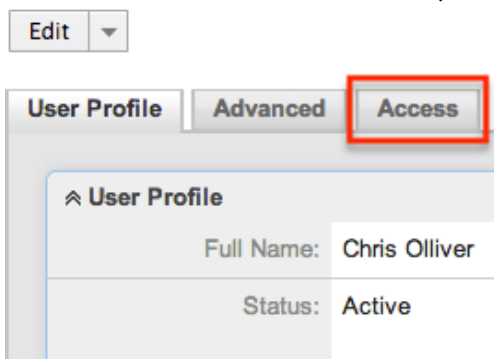
5. After selecting the user(s), the popup search box will close and the user(s) will now be displayed in the Users subpanel for the role to complete the relationship



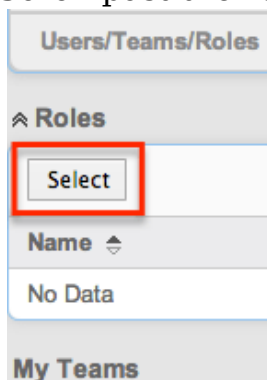
Assigning Via User Management

From User Management, a user can be associated to a role via the user's detail view. For more information on User Management, please refer to the [User Management](#) documentation. To associate a role to a user via User Management, follow the following steps:

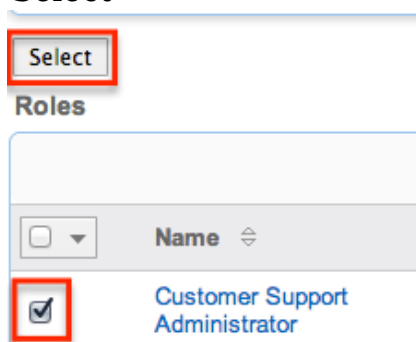
1. Navigate to Admin > User Management
2. From the Users list view, open the user record that you would like to edit
3. From the user's detail view, click on the "Access" tab



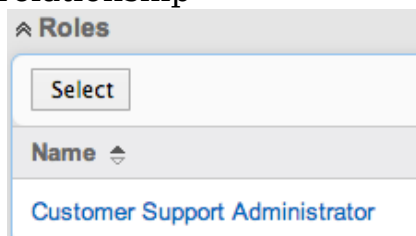
-
4. Scroll past the role chart to the subpanel for "Roles" and click "Select"



5. Use the popup search menu to search for and select the role(s) you would like to add to this user where you can either click on the role's name or, if selecting multiple roles, click the corresponding checkboxes and then click "Select"



6. After selecting the role(s) the popup search box will close and the role(s) will now be displayed in the Roles subpanel for the user to complete the relationship



Viewing Roles

There are various options available for viewing role records in Sugar including via the Roles list view, Roles detail view, Roles Recently Viewed menu, the List Roles by User function, and from the Users module.

Viewing Via List View

The Roles list view displays all role records meeting the current search criteria. To access the list view, simply navigate Admin > Role Management. Alternately, if you

are looking at a role's detail view, you can click the Roles module tab to return to the list view. You can click the role's name to open the record in detail view. For more information on viewing roles via list view, please refer to the [Roles List View](#)

Viewing Via Detail View

The Roles detail view is where all of the modifications to the role settings can be made. This page includes the name and description of the role, the chart where module settings can be manipulated, links to the field-level action settings, and the Users subpanel where users can be added to the role. For more information on viewing roles via detail view, please refer to the [Roles Detail View](#) section of this documentation.

Viewing Via Recently Viewed

As you access different roles, Sugar will keep track of which roles you have recently viewed. Hover on the [Roles module tab](#) to see a list of your most recently viewed roles and click each name to open the role in detail view.



Viewing Roles by User

Role Management offers the option to view all roles assigned to specific users. Hover on the Roles module tab and click "List Roles By User" to view these.



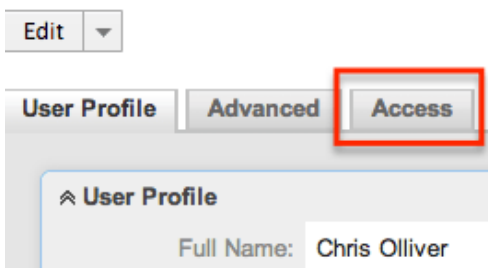
You will be redirected to the [Users](#) module and a screen will appear with a dropdown list with all users' names included. Select the user you would like to view and a chart will show which is a compilation of all of the roles listed for the user in the Roles subpanel, at the bottom of the page.

Chris Olliver ▾

	Access	Access Type	Delete	Edit
Accounts	Enabled	Admin & Developer	All	All
Bug Tracker	Enabled	Admin & Developer	All	All
Calls	Enabled	Normal	None	Owner

Viewing Via Users Module

User profiles allow the option to see both what roles the user is associated to and how the user's role match together. When viewing a user profile, all role information can be found by navigating to the "Access" tab. For information about accessing the users module, please refer to the [Users](#) documentation.



The access tab contains a chart showing all of the modules and actions available in Role Management. This chart is a compilation of all of the roles listed for the user in the Roles subpanel, at the bottom of the page.

Chris Olliver

Edit ▾

User Profile	Advanced	Access																				
		<table border="1"><thead><tr><th></th><th>Access</th><th>Access Type</th><th>Delete</th><th>Edit</th></tr></thead><tbody><tr><td>Accounts</td><td>Enabled</td><td>Admin & Developer</td><td>None</td><td>All</td></tr><tr><td>Bug Tracker</td><td>Enabled</td><td>Admin & Developer</td><td>All</td><td>All</td></tr><tr><td>Calls</td><td>Enabled</td><td>Normal</td><td>All</td><td>All</td></tr></tbody></table>		Access	Access Type	Delete	Edit	Accounts	Enabled	Admin & Developer	None	All	Bug Tracker	Enabled	Admin & Developer	All	All	Calls	Enabled	Normal	All	All
	Access	Access Type	Delete	Edit																		
Accounts	Enabled	Admin & Developer	None	All																		
Bug Tracker	Enabled	Admin & Developer	All	All																		
Calls	Enabled	Normal	All	All																		

When viewing the chart, the most restrictive setting for the specific intersection will take precedence, and will represent the option for the user. Therefore, if the user has two roles assigned, one of which allows him or her to delete a record, and another which does not, Sugar will enforce the option where the user cannot delete the record. The table shown in User Management is not able to be edited. Instead, the role itself must be edited which will change the setting for any other users associated to the role.

To view the role settings from User Management and make any necessary changes, simply click the role's name from the Roles subpanel, which will take you to the [role's detail view](#) .

Roles	
Name	Description
Customer Support Administrator	Customer Support Administrator Role
Sales Administrator	Sales Administrator Role

Searching Roles

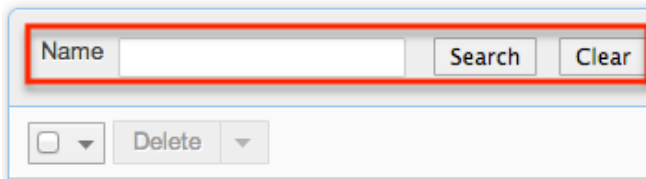
The Roles list view search function allows you to search for the name of the role to help you locate records easily and effectively. Once the search is performed, the relevant results will be displayed in the Roles [list view](#) below.

The buttons in the search panel have the following functions:

-
- Search : Click the Search button or press your Return/Enter key to perform the search
 - Clear : Click the Clear button to clear all criteria from the searchable fields

To see all Role records, simply click "Clear" and then "Search" to perform a blank search with no name filter.

Roles



The screenshot shows a search interface for Roles. At the top, there is a search bar with the label "Name" and a text input field. To the right of the input field are two buttons: "Search" and "Clear". A red rectangular box highlights the "Name" label, the input field, and both the "Search" and "Clear" buttons. Below the search bar, there is a "Delete" button with a small downward-pointing arrow to its right.

Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %Administrator). This will pull up any record that has the word "administrator" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used, please refer to the Search documentation.

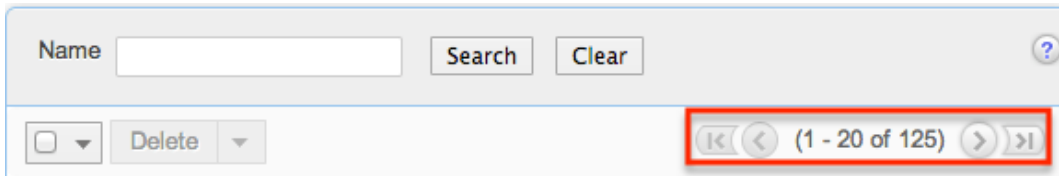
Roles List View

The Roles list view displays all roles meeting the current search criteria, if any. You can view the name and description of each role within the field columns. Click on the name of the role to access the [detail view](#) for the role and review the settings further.

Pagination

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

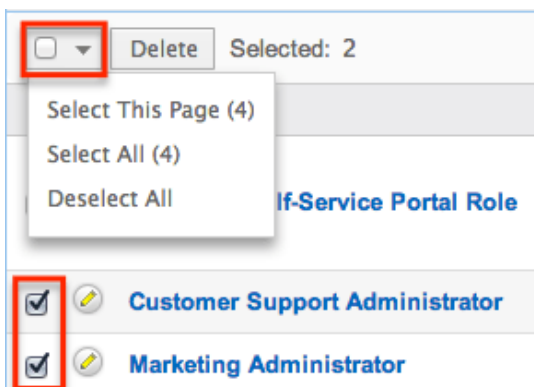
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via the System menu in Admin. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.



Checkbox Selection

Roles can be deleted in a mass-delete fashion via the list view by selecting all of the role records. To select individual role records on the Roles list view, mark the checkbox on the left of each row. To select or deselect multiple roles on the list view, use the options in the checkbox dropdown menu:


- Select This Page : Selects all records shown on the current page of results
- Select All : Selects all records in the current search results across all pages of results
- Deselect All : Deselects all records that are currently selected



For more information on deleting roles, please refer to the [Mass Deleting Via List View](#) section of this documentation.

Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header for either "Name" or "Description". The list view may be sorted by only one column at a time.

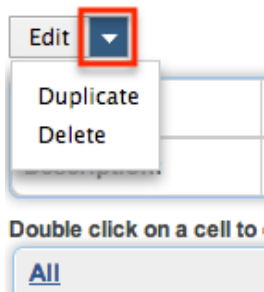
Name	Description
<input checked="" type="checkbox"/>  Customer Support Administrator	Customer Support Administrator Role

Roles Detail View

The Roles detail view displays thorough information about the role, as well as the ability to perform most actions related to role management. It comprises of a chart showing all modules in Sugar and actions that the user can have access to or be restricted from. The detail view also provides links to drill down into each module to make field level permission changes. Finally, the detail view includes a Users subpanel where users can be associated to the role and will therefore take on the role's properties.

Actions Menu

The Actions menu on the top left of each role's detail view allows you to perform various actions on the current record. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the [System](#) documentation in the Administration guide.



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

Menu Item	Description
Edit	Edit the name and description of this role
Duplicate	Duplicate this role to create a new role
Delete	Delete this role

Module-Level Permissions

The Role Chart comprises of ten columns and a row for each module down the left hand side. The columns each represent a type of action within Sugar, and the corresponding point between the columns and module roles defines the role's permissions. The role permissions are able to be updated from the detail view of each role. For an explanation on each action and how to update roles, please review the [Setting Module-Level Permissions](#) section of this documentation.

	Access	Access Type	Delete	Edit	Export	Import	List	Mass Update	View
Accounts	Enabled	Admin & Developer	None	All	All	None	All	All	All
Bug Tracker	Enabled	Admin & Developer	All	All	All	None	All	All	All

Field-Level Permissions

In addition to changing the permissions for specific modules, Role Management also provides the option to set permissions and restrictions on specific fields within modules. The field-level permissions are able to be updated from the detail view of each role. For an explanation on each action and how to update field-level permissions, please review the [Setting Field-Level Permissions](#) section of this documentation.

Field Permissions

Type [+]	Not Set	Annual Revenue [+]	Not Set	Assigned to [+]	Not Set	Billing Street [+]	Not Set
Campaign [+]	Not Set	Created By [+]	Not Set	Description [+]	Not Set	Email Address [+]	Not Set
Employees [+]	Not Set	Industry [+]	Not Set	Modified By Name [+]	Not Set	Name* [+]	Not Set

Users Subpanel

A user has to be associated to a role to be able to take on the role's permission settings. Assigning a role is much like any other many to many relationship in Sugar, where many users can be associated to one particular role, and one user can also be assigned to multiple roles. From Role Management, a user can be associated to a role via the Users subpanel at the bottom of the page. To associate uses to a role, follow the following steps:

1. Navigate to the detail view of the role that you would like to edit.
2. At the bottom of the page, click "Select User" from the Users subpanel.

Save Cancel

^ Users

Select User

Name	User Name
No Data	

- Use the popup search menu to search for and select the user(s) you would like to add to this role. You can either click on the user's name or, if selecting multiple users, click their corresponding checkbox and then click "Select".

Select

Users

<input type="checkbox"/>	Name	User Name
<input checked="" type="checkbox"/>	Chris Olliver	chris
<input type="checkbox"/>	Jim Brennan	jim
<input type="checkbox"/>	Max Jensen	max

- After selecting the user(s) the popup search box will close and the user(s) will now be displayed in the Users subpanel for the role to complete the relationship.

^ Users

Select User

Name	User Name
Chris Olliver	chris

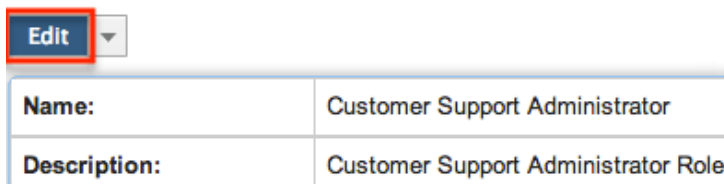
Editing Roles

Roles may be edited at any time to update or add information to the record or to edit the role restrictions. You can make changes to existing role records via the Roles detail view and edit view, depending on the change being made. Changes via the detail view are made directly on the role permission chart. Edit view is available within the Roles module and includes the Name and Detail fields.

Editing Via Detail View

You can edit roles via the detail view by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update either the Name or Description fields, then click "Save" to preserve the changes made.

Customer Support Administrator



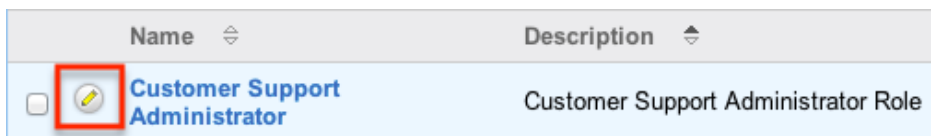
The screenshot shows a blue 'Edit' button with a dropdown arrow, highlighted with a red box. Below it is a table with two rows: 'Name: Customer Support Administrator' and 'Description: Customer Support Administrator Role'.

Edit	
Name:	Customer Support Administrator
Description:	Customer Support Administrator Role

Edits to the settings on the role are also performed via the detail view. Below the Name and Description fields, is where you will find the role permission chart. This chart is made up of rows representing the different modules in Sugar, and columns representing each of the action types Sugar users can perform. Edits to this table are made by clicking the box at the intersection of a row and column, which produces a dropdown list of available options. For more information on module permission changes, please review the information in the [Setting Module-Level Permissions](#) section of this documentation.

Editing Via List View

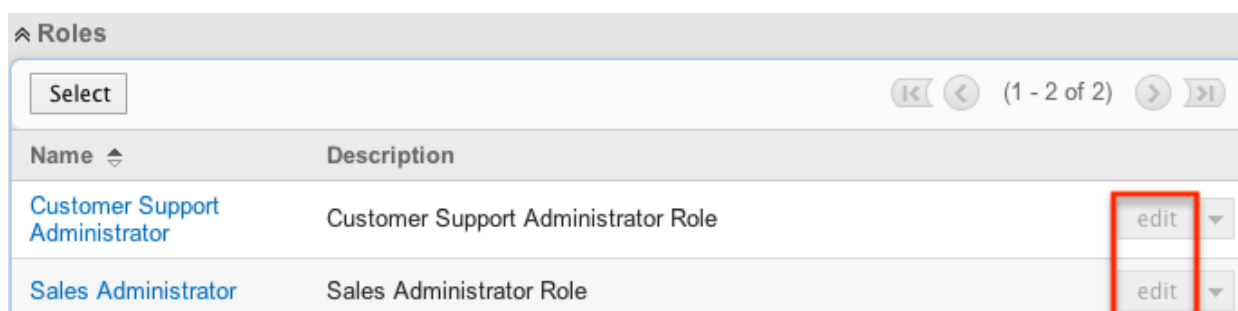
You can edit roles via the list view by clicking the Pencil icon to the left of each role's name. After clicking the pencil, the window will move to the edit view. Update the necessary fields, then click "Save" to preserve the changes. After saving from the edit view, you will be returned to the detail view for the record that you just updated. Because this method brings you to the edit view, only the Name and Description fields can be updated.



Editing Via Users Module

The users module allows you to see all of the roles associated to a specific user in one place under the "Access" tab. The page will show a subpanel with a list of all of the roles associated to the user. For more information about viewing the roles from the Users module, please review [Viewing Via Users Module](#) .

On the "Roles" subpanel, there is an option to edit the role. After clicking the "Edit" button, the window will move to the edit view. Update the necessary fields, then click "Save" to preserve the changes. After saving from the edit view, you will be returned to the detail view for the record that you just updated. Because this method brings you to the edit view, only the Name and Description fields can be updated.



Name	Description	
Customer Support Administrator	Customer Support Administrator Role	edit
Sales Administrator	Sales Administrator Role	edit

Deleting Roles

If a role record is invalid or is no longer being used in your organization's Sugar instance, it may be deleted from either the Roles detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting role records will not delete the related user records and will only remove the relationship.

Deleting Via Detail View

Use the following steps to delete a role via the detail view:

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

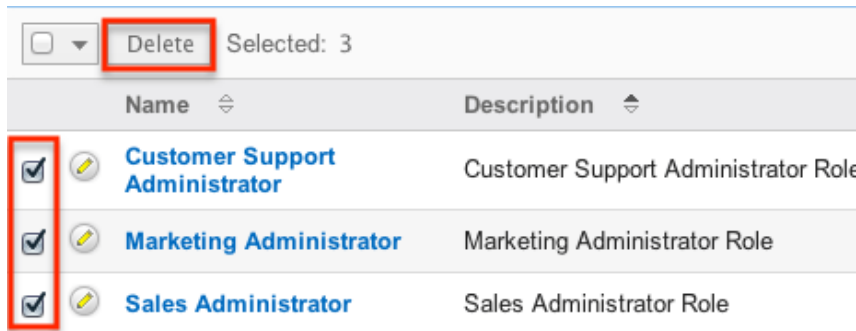


3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Mass Deleting Via List View

Use the following steps to delete one or more roles via the list view:

1. Navigate to Admin > Role Management.
2. Use the [search functionality](#) to find the Role records you wish to delete.
3. Select the desired role records individually or using the [checkbox dropdown](#)'s options.
4. Choose "Delete" from the Actions menu.



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

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

Last Modified: 11/08/2016 02:04pm

Password Management

Overview

Password Management is used to administer requirements, expirations, and other policies about user passwords in Sugar. Sugar allows administrators to set up system generated passwords versus manually created passwords for new users, failed login lockout attempts, and configure the email templates used to send password information to users. Password management is not used to change user's passwords, which can be done via their [User Profile](#).

Password Requirements

The Password Requirements panel lets you configure minimum and maximum lengths of passwords, as well as what characters are required in passwords. Filling in either of the first two fields, Minimum Length and Maximum Length, will force a

requirement for your users to have passwords be more than or less than a given amount of characters. Additionally, use any of the four checkboxes to force character requirements on users' passwords. This can force users to include upper case letters, lower case letters, numbers, or special characters in their passwords.

Password Requirements			
Minimum Length:	<input type="text" value="5"/>	Maximum Length:	<input type="text" value="10"/>
Must contain one upper case letter (A-Z):	<input checked="" type="checkbox"/>	Must contain one lower case letter (a-z):	<input checked="" type="checkbox"/>
Must contain one number (0-9):	<input checked="" type="checkbox"/>	Must contain one of the following special characters (-,!,@,#,\$,%^,&*,(,),_+, -, =, {, },):	<input type="checkbox"/>

Advanced Options

You can also specify words or other strings that are not allowed in a password, called Regex Requirements. The configurations for Regex Requirements are found in the Advanced Options section of the Password Requirements panel.

Must contain one number (0-9): <input checked="" type="checkbox"/>	Must contain one of the following special characters (-,!,@,#,\$,%^,&*,(,),_+, -, =, {, },): <input type="checkbox"/>
<input checked="" type="checkbox"/> Hide Advanced Options	
<input checked="" type="checkbox"/> Regex Requirement: <input type="text"/>	<input type="checkbox"/> Regex Description: <input type="text"/>

To set a Regex Requirement, type in code of characters that are not allowed. In the Regex Description field, write a message to users that will show when they try to edit their passwords, explaining what strings are not allowed. For more information on Regex usage, please review the Regular Expressions website at <http://www.regular-expressions.info/>.

Some examples of regular expressions in password rules are listed below:

Sample Expression	Password Rule
Sugar	Password cannot contain the word Sugar.
([A-Za-z0-9])\1	Password cannot repeat a letter or number consecutively; for example, AA or 88.
([a-zA-Z]){4,}	Password cannot repeat any two consecutive letters; repeat characters or letters must be separated by a special character such as %.

[\t]	Password cannot contain spaces and tabs.
[@#\$]	Password cannot contain @, #, or \$.

System Generated Passwords

When enabled, the System Generated Passwords feature will allow users to receive a randomly generated password via email. This functionality is utilized either when a new user is created or when an administrator activates the Reset Password button in the [user's profile](#).

The two requirements to utilize system generated passwords are:

- A user has a valid primary email address configured in their [User Profile](#)
- A system outbound email server (SMTP) is configured in [Email Settings](#)

For security reasons, when the System Generated Passwords feature is enabled, you also have the option to set an expiration for the system-generated password. You can specify when the temporary password expires, either after a certain amount of days, months, or weeks, or after a specified number of logins. Simply click the radio button next to the expiration you would like to use and enter the login or length of time variable as need be, or click "None" for the password to never expire.

The screenshot shows a settings panel titled "System-Generated Password Expiration". It contains three radio buttons: "None", "Password Expires in", and "Password Expires upon". The "Password Expires in" option is selected. Next to it is a text input field containing the number "7" and a "Days" dropdown menu with a double-headed arrow icon. The "Password Expires upon" option is unselected and followed by an empty text input field and the word "logins".

User Reset Password

The forgot password feature allows administrators to enable the Forgot Password link to display in the Sugar login window. If a user does not remember their password, they can click this option, enter their user name and their primary email address in Sugar, and a Reset Password link will be emailed, guiding them through the process to reset their forgotten password. For more information on how a user resets his or her password, please view the [Getting Started](#) documentation.

The two requirements to utilize Forgot Password feature are:

- A user has a valid primary email address configured in their [User Profile](#)

- A system outbound email server (SMTP) is configured in [Email Settings](#)

User Reset Password	
Enable Forgot Password feature: <i>i</i>	<input checked="" type="checkbox"/>
<i>A primary email address is required for each user in order to use this feature.</i>	
Generated Link Expiration: <i>i</i>	<input type="radio"/> None Link Expires in <input type="text" value="24"/> <input type="text" value="Hours"/>
Enable reCAPTCHA Validations: <i>i</i>	<input type="checkbox"/>

For security reasons, when the Forgot Password feature is enabled, you also have the option to set an expiration for the generated link. You can set the link to expire within any given amount of minutes, hours, or days. To set this, simply select the radio button next to "Link Expires in", and set your given amount of time.

CAPTCHA Validation

As an additional precaution, you can enable CAPTCHA validation to prevent automated programs from gaining unauthorized access to user accounts. When enabled, when a user attempts to use the Forgot Password feature, they will have to confirm a CAPTCHA, in addition to providing their user name and primary email address.



The screenshot shows a web form for the "Forgot Password" feature. It includes fields for "User Name:" and "Email Address:". Below these is a CAPTCHA section with the text "Enter the Two Words Below:" and a box containing the words "May" and "Realist" in a stylized font. Below the CAPTCHA box are the links "Get another CAPTCHA" and "Switch to Sound", and a "Submit" button. A red box highlights the CAPTCHA area.

Use the following steps to enable CAPTCHA for the Forgot Password menu:

1. Create an account with reCAPTCHA from the reCAPTCHA website at <https://www.google.com/recaptcha>.
2. After creating an account, save your Public Key and Private Key which will be entered into Sugar
3. In Sugar, navigate to Password Management and the "User Reset Password" panel
4. Click the checkbox to Enable reCAPTCHA Validations
5. Enter the Public Key and Private Key in the fields provided

Enable reCAPTCHA Validations:	<input checked="" type="checkbox"/>
Public Key* 6LFYwt4SAAAAAL9n5HszJa2R1XdSPkUh97TJPC	Private Key* 6LFYwt4SAAAAABOaGTjj0a8TTZdn0BiOjbzF1s

Email Templates

Sugar comes standard with two password templates. One is for the [System Generated Password](#) emails that are sent out, and the other is for the [Reset Password](#) email. The templates are editable through Password Management and new ones can also be created. To create a new version of either template, click the Create button on the specific line. To edit the existing template, click the Edit button on the specific line.

Email Templates	
Email template containing system-generated password:	System-generated password email <input type="button" value="Create"/> <input type="button" value="Edit"/>
Email template containing system-generated link to reset password:	Forgot Password email <input type="button" value="Create"/> <input type="button" value="Edit"/>

Templates can also be viewed via the Emails module by navigating to the Email Templates list view. The templates are easily found as the Type is blank, whereas any other template will be either a Campaign, Email, or Workflow template. For more information on [Email Templates](#), please review the Emails section of the application guide.

Note: If you choose to create your own templates to send passwords, copy the variables provided in the default template. The variables "\$contact_user_link_guid" from the "Forgot Password Email" and the "\$contact_user_user_hash" and "\$config_site_url" are not available from the variable dropdowns when creating the templates.

Name Type Search

Name	Type	Description	User
<input type="checkbox"/> <input type="button" value="✎"/> Forgot Password email		This template is used to send a user a link to click to reset the user's account password.	
<input type="checkbox"/> <input type="button" value="✎"/> System-generated password email		This template is used when the System Administrator sends a new password to a user.	

User-Generated Password Expiration

Sugar provides the ability to force users to create new passwords after a given period. This can be configured for either specific amounts of time in days, weeks, or months, or after a specific amount of logins. To configure a password expiration, select the radio button next to the expiration period you would like to use and enter the timeframe or amount of logins that the user will be allotted.

User-Generated Password Expiration

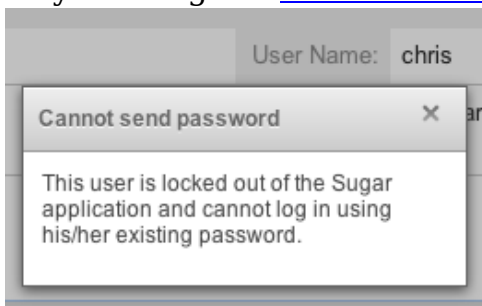
None
 Password Expires in
 Password Expires upon logins

Login Lockout

To prevent against unauthorized logins, Sugar includes a configurable lockout function. This means that you will define a specific amount of unsuccessful attempts that a user name can be used to log in before the user name will not be able to log in. You also configure a given amount of time before the restriction is listed in either minutes, hours, or days. To configure Login Lockout, click the radio button next to "Lockout users after _ un-successful login attempts", fill in the number of attempts and define the timeframe.

Login Lockout
 None
 Lockout users after un-
successful login attempts
Enable login again after:
Minutes

Note: When a user has been locked out, the user must wait until the given timeframe has been reached. The only way to manually allow a user to log back in is by clicking the [Reset User Preferences](#) button in the user's profile.



External Authentication

Sugar allows the ability to utilize the external authentication protocols, LDAP and SAML, to utilize a seamless login process. Both configuration options are found as the last two panels in the Password Management menu. By clicking either checkbox to enable the external authentication type, all other panels on the page will be removed, as the protocol will supersede any other Password Management settings.

Note: [Team Management](#) and [Role Management](#) are still taken into account when External Authentication is active.

LDAP Support
Enable LDAP Authentication
[i](#)

SAML Authentication
Enable SAML Authentication
[i](#)

LDAP

Sugar can be configured to accept Lightweight Directory Access Protocol (LDAP) authentication if your organization has implemented LDAP or Active Directory authentication. When users in your system attempt to log into Sugar, the application will authenticate them against your LDAP directory or Active Directory. If authentication is successful, the user is allowed to log into Sugar. If the authentication is unsuccessful, Sugar will then attempt to verify the provided credentials against its own database of valid user names and passwords.

Password Management

LDAP Support

Enable LDAP Authentication *i*

Server: <i>i</i>	<input type="text"/>	Port Number: <i>i</i>	<input type="text"/>
User DN: <i>i</i>	<input type="text"/>	User Filter: <i>i</i>	<input type="text"/>
Bind Attribute: <i>i</i>	<input type="text"/>	Login Attribute: <i>i</i>	<input type="text"/>
Group Membership: <i>i</i>	<input type="checkbox"/>		
Authentication: <i>i</i>	<input type="checkbox"/>		
Auto Create Users: <i>i</i>	<input type="checkbox"/>		
Encryption Key: <i>i</i>	<input type="text"/>		

To configure LDAP, you will first have to navigate to Admin > Password Management and click the "Enable LDAP Authentication" checkbox near the bottom of the screen. All other screen options will be removed and you will be presented with a page of only options for LDAP. Fill in the appropriate options in the following fields, then hit save to commit your changes. Suggested options are included in the description, but these may change depending on your LDAP configuration.

Field	Description
Authentication	Check this box to enable the User Name and Password fields. Enter " username@MYSERVER.MYDOMAIN.com" or "domain\\userfirstname.userlastname"

	<p>for the User Name, and the corresponding password.</p> <p>Note: You need to add a user to your active directory for the purpose of authenticating from your SugarCRM to your active directory to read the LDAP. This user should be a service account that needs only read access to Active Directory. If you chose to enter it in the format "domain\\userfirstname.userlastname", enter it with two backslashes as "domain\\\\userfirstname.userlastname" because, when you click Save, Sugar will remove one of the backslashes.</p>
Auto Create Users	<p>Select this checkbox to create the user name in the Sugar database if it does not already exist. Typically this box remains unchecked.</p> <p>Note: If this setting is enabled, a Sugar user will be created for every LDAP user logging into the application which will, in turn, take an active license from your license count purchased through Sugar.</p>
Bind Attribute	A case-sensitive value, enter userPrincipalName for Active Directory.
Enable LDAP Authentication	Uncheck this box if you would like to disable LDAP in your instance.
Encryption Key	<p>If you are using LDAP with SOAP, enter the encryption key to encrypt user passwords in the Sugar Plug-in for Microsoft Outlook.</p> <p>Note: The "php_mcrypt" extension must be enabled in the php.ini file.</p>
Group Membership	<p>Select this checkbox if you wish to specify that the user is a member of a specific group, and enter the following information:</p> <ul style="list-style-type: none"> • Group DN : Enter the group DN

	<p>name For example: ou=groups, dc=example, dc=com</p> <ul style="list-style-type: none"> • Group Name : Enter the group name For example: cn=sugarcrm • User Attribute : A unique identifier used to check if the user is a member of the group For example: uid • Group Attribute : The attribute of the group that will be used to filter against the User Attribute For example: MemberUid
Login Attribute	A case sensitive value, enter sAMAccountName for Active Directory.
Port Number	Enter 389, which is the default port.
Server	<p>Enter the FQDN of your Active Directory Server which should be your Domain Controller.</p> <p>For example: MYSERVER.MYDOMAIN.com</p>
User DN	<p>Enter the user DN name.</p> <p>For example: ou=people, dc=example, dc=com</p>
User Filter	<p>Enter any additional parameters to apply when authenticating users.</p> <p>For example: is_user_id=1</p>

SAML

Sugar can be configured to accept Security Assertion Markup Language (SAML) for single sign-on, if it is implemented in your organization. When users in your system attempt to log into Sugar, the application will authenticate them against SAML. If authentication is successful, the user is allowed to log into Sugar. If the authentication is unsuccessful, Sugar will then attempt to verify the provided credentials against its own database of valid user names and passwords. Sugar only supports the use of SAML version 1.1.

Password Management

SAML Authentication

Enable SAML Authentication i

Login URL i

X509 Certificate i

To configure SAML, you will first have to navigate to Admin > Password Management and click the "Enable SAML Authentication" checkbox near the bottom of the screen. All other screen options will be removed and you will be presented with a page of only options for SAML authentication. Fill in the appropriate options in the following fields and then hit save to commit your changes.

Note: You must disable the [Forgot Password](#) option if you are using SAML authentication.

- **Enable SAML Authentication:** Uncheck this box if you would like to disable SAML Authentication in your instance.
- **Login URL:** Enter the SAML URL for authentication. This is the path to the SAML server to which you are authenticating.
- **X509 Certificate:** Enter the SAML X509 certificate public key.

Setting User Passwords

Administrators have the option to manually set or reset user's passwords as need be. Setting a regular user's password is done simply through the Users module via Admin > User Management. This method will vary depending on the [System Generated Passwords](#) option. For more information on changing a user's password from the Users module, please review the [Resetting User Passwords](#) section of the Users documentation.

Last Modified: 01/19/2017 12:20pm

User Management

Overview

The User Management module provides administrators access to create, edit, activate, and deactivate the profiles of all the users in your instance of Sugar. This module and underlying settings control each individual's log in credentials as well as some personalized settings. During the installation process, Sugar creates one administrator by default. This user can then log in and create additional users, in a variety of capacities, to be able to access Sugar and utilize all of the other CRM functionality. In combination with the role and team security, administrators can fully establish a profile for each user in Sugar.

User Types

There are three different types of users in Sugar: Regular User, System Administrator, and Group User. These three types have different functions and uses and their use will vary for each instance. Depending on an organization's use of Sugar, not all of these user types will necessarily be used.

Note: Users with an inactive status do not count towards the number of Sugar licenses purchased for the organization. Group Users never against a license count regardless of status.

Regular User

A regular user is the most common of the user types. A majority of employees of an organization will be regular users. This user can access most Sugar modules and perform most every day-to-day function. Regular users are subject to be restricted in their abilities and what records they can access by an administrator using the [Teams](#) and [Roles](#) functionalities in Sugar.

Regular Users will appear in the [Employees](#) module. To create a Regular User, please review the [Regular And Admin Users](#) section of this documentation.

System Administrator

System Administrator users, or "admins," have all of the abilities and functionality of a regular user, but also have administrative privileges as well. Admins can perform functions such as creating and editing users, editing system wide settings, and have access to diagnostic and troubleshooting tools. In addition, admins can access all modules and records, and are not subject to team or role restrictions. All instances of Sugar require at least one administrator, but it is also recommended

to have more than one incase the original admin is for some reason unavailable or is no longer with the company.

System Administrators will appear in the [Employees](#) module. To create a System Administrator, please review the [Regular And Admin Users](#) section of this documentation.

Note: All administrators where the user status is active count as a licensed user.

Group User

A Group User is a bucket that is used for assigning records to a user other than a specific person. Group Users cannot be logged in users, like a Regular or System Administrator user. Due to this, they do not have the same settings available, including the ability to use a password. As Group Users cannot be used to log in to Sugar, these do not count against an organization's license count.

Examples of uses for a Group User would be to assign all new leads to a group user named "Sales", or assign all new support cases to "Support", before they are assigned out to specific users.

Group Users will not appear in the [Employees](#) module. To create a group user, please review the [Group Users](#) section of this documentation.

User Fields

The Users module contains a number of stock fields, which are included out of the box with Sugar. The below definitions are suggested meanings for the fields, but many of the fields can be leveraged differently to best meet your organization's needs. System Administrators have the ability to alter, remove, or add fields in the User Profile tab via Admin > Studio, minus a few noted exceptions. For more information on adding or modifying fields, please refer to the [Studio](#) documentation in the Administration guide.

The User Profile tab contains the contact information for the user and other important user-specific settings. The Fields are as follows:

Field	Description
Address City	The city of the user's address
Address Country	The country of the user's address
Address Postal Code	The postal code of the user's address
Address State	The state of the user's address

Address Street	The street name and number of the user's address
Department	The department where this user works
Description	A description or other information about this user
Display Employee Record	Check this box if the user should have an employee record show in the Employees module
Email Address	The user's email addresses, where a primary address is selected to receive email notifications and if this should be a reply to address when using Sugar's outbound email (SMTP) functionality Note: This field is not editable in studio
Email Client	When clicking on an email address in Sugar, this will determine if Sugar's email editor will open, or if the user's primary email program on this computer (e.g. Microsoft Outlook, Apple Mail, etc.) will open Note: This field is not editable in studio
Employee Status	The user's employment status in the organization (Active, Terminated, or Leave of Absence). This field will be automatically updated when the "Status" of the user changes
Fax	The user's fax number
First Name	The user's first name
Home Phone	The user's home phone number
IM Name	The user's instant message screen name
IM Type	The user's instant message service type
Last Name	The user's last name
Mobile	The user's mobile phone number
Other Phone	An additional phone number for the user
Picture	Upload an image to this field to represent the user that will be shown on the Activity Stream and next to the user's name on the navigation bar

Reports to	<p>Use this field to select this user's manager. The user that this user reports to will become an implicit member of this user's Teams and will also affect forecasting</p> <p>Note: This field is not editable in studio</p>
SMTP Password	<p>If an outgoing email server is defined in Admin > Email Settings , the user's SMTP password can be input here to send mail through Sugar</p> <p>Note: This field is not editable in studio</p>
SMTP Username	<p>If an outgoing email server is defined in Admin > Email Settings , the user's SMTP user name can be input here to send mail through Sugar</p> <p>Note: This field is not editable in studio</p>
Status	<p>Making a user inactive will make it so this user cannot log in to Sugar. This will also remove the user from taking a license seat, without having to delete the user. When making a user inactive, the admin is prompted to use the Reassign Records function. This will also automatically update the Employee Status to be Terminated.</p>
Title	The user's job title
User Name	The user name will be what the user logs in to Sugar with on the login page. It will also show for other users when they view fields such as "Assigned to" and "Created By". This is the name that will define the specific user in Sugar and should be unique for every user.
User Type	<p>This is where the admin can decide to grant a regular user System Administrator access to Sugar</p> <p>Note: This field is not editable in studio</p>
Work Phone	The user's work phone number

The Advanced tab in the user's profile includes settings to configure how Sugar

will function for that specific user. The fields in the Advanced tab cannot be edited in Studio.

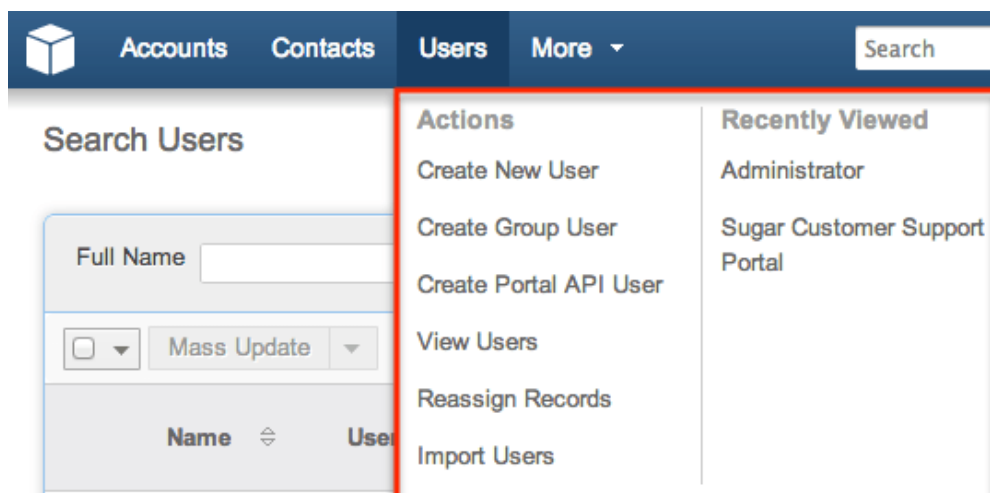
Field	Description
1000s separator	Select a character to use as a 1000's separator, with an example showing in the "Example" box
Currency	Select this user's default currency, with additional currencies able to be defined in Admin > Currencies
Currency Significant Digits	Define how many digits will appear after the decimal point when the user views a currency field, with an example showing in the "Example" box
Data Font Size	The default font size of the PDF body when generated by this user
Date Format	How date fields will appear for the user, with the ability to control month, day, and year formatting
Decimal Symbol	Select a character to use as a decimal symbol, with an example showing in the "Example" box
Default Teams	A default team defines the team set when this user creates a record. Whenever this user creates a record, the team is set as the user's default team, similar to how the "Assigned To" field is set to be the created user. Note: Users can be assigned any number of default teams.
Export Delimiter	Character or characters used to delimit exported data by this user
First Day of Week	Which day of the week will show as the first day when the user views the Sugar calendar
Font for Footer	Select a font for the footer in PDF documents when generated by this user
Font for Header and Body	Select a font for the header and body of PDF documents when generated by this user

iCal integration URL	URL in which someone can subscribe to the user's Sugar calendar within iCal or other programs that support iCal integrations
Import/Export Character Set	The default character set used for imports, exports, and vCard generation for this user
Mail Merge	<p>Check to allow this user to perform mail merges</p> <p>Note: Mail merge must also be enabled in Admin > System Settings > "Enable Mail merge"</p>
Main Font Size	The default font size in the PDF header when generated by this user
Module Menu Filters	Check this box to view modules in the navigation bar based on pre-defined groups, and when selected, the "Filter Menu By" feature will appear in the "More" navigation menu
Name Display Format	How concatenated name fields will appear for the user, with the ability to control first name, last name, and salutation formatting
No Opportunities	This is used for forecasting and should be checked if the user will not be assigned opportunities
Notify on Assignment	<p>When this box is checked, the user will receive an email notification when a record is assigned to them by another user</p> <p>Note: A system outbound mail account must be enabled in Admin > Email Settings</p>
Publish at my location	Used to share free/busy information between Sugar and Microsoft Outlook calendars
Publish Key	Alphanumeric code entered by the user to uniquely identify his or her calendar and populate the iCal integration URL, Publish at my location site, and Search

	Location
Reminders	<p>This field sets the default reminder settings for calls and meetings created by this user so that when the user creates a call or meeting, the reminder settings will be pre-populated to the configuration defined in this field.</p> <p>Popup: Users that are invited to a call or meeting created by this user to receive a browser popup notification for the call or meeting at a given time interval before the activity.</p> <p>Email all invitees: Invitees invited to a call or meeting created by this user to receive an email notification for the call or meeting at a given time interval before the activity.</p>
Search Location	Used to share free/busy information between Sugar and Microsoft Outlook calendars
Select Modules for Navigation Bar	The order of the module navigation bar is defined by the order in the "Display Modules" column and modules listed in the "Hide Modules" will not appear in the bar
Show Full Names	When this box is checked, the user will see user's full names ("John Smith") instead of user names ("jsmith") when using Sugar
Subpanel Tabs	In detail views, this checkbox will group subpanels into like groups as tabs and display one tab at a time.
Time Format	How time fields will appear for the user, with the ability to control hour, minute, and 12 versus 24 hour clock formatting
Time Zone	Select the local time zone for this user
User Wizard Prompt	Check this to have users go through the New User Wizard upon their next login

Users Module Tab

The Users module tab is only available by an administrator navigating to Admin > User Management. Hover on the Users module tab to display the Actions menu and Recently Viewed menu. You can also click the Users tab to access the Users list view. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of users you last viewed in the module. For more information on records last viewed, please refer to the [Viewing Via Recently Viewed](#) section of this page.



The options in the Actions menu allow you to perform the following types of action:

Option	Description
Create New User	Opens the edit view layout to create a new user
Create Group User	Opens the edit view layout to create a new Group User
View Users	Opens the list view layout to search and display users
Reassign Records	Opens the Reassign Records tool
Import Users	Opens the import wizard to create or update users using external data

Creating Users

There are three methods for creating new users in Sugar. These are via the users module, duplication, or import. Creating users is an imperative function in Sugar as it allows for other members of your organization to log in to Sugar and access all of your customer data.

Creating Via Module Tab

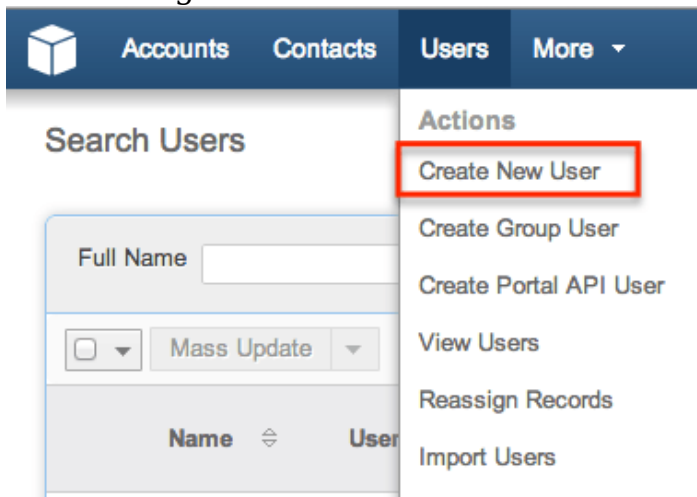
The most common method for creating new users is via the create users options on the Users module tab. This will open an edit view screen where you can enter in all of the necessary information to create a new user. The create screens for Regular and Admin users, and Group Users will differ depending on the type of user you are creating.

Regular and Admin Users

Regular and Admin users are the most common users that will be created in a Sugar instance and contain the most detail and fields compared to the other [user types](#) . For more information about the use of Regular and Admin users, please review the [Regular User](#) and [System Administrator](#) sections of this documentation.

To create a new user, follow these steps:

1. Navigate to Admin > User Management.
2. Hover over the Users module tab and click the create option for the user you are creating.



3. Enter appropriate values for the [fields](#) in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
 - Enter the following information under the User Profile tab:
 - In "User Profile" enter a user name for this user which will define the specific user in Sugar and should be unique for every user. Sugar will default the user to being Active and a Regular User, which can be updated if the user is going to be an administrator.
 - In "Employee Information", contact information and other specific

information about the user can be added. This will include phone numbers, contact address, the user's department and job title, and any description information.

- In "Email Settings" the user's email address or addresses can be added. The email addresses can also be marked as "Primary", meaning that this will be the first email address that shows for the user, and "Reply-to", where automatic notifications from Sugar will be sent. In this section, the user's outbound email client will be selected to default to Sugar or an external program, such as Microsoft Outlook. If a mail server is configured in Admin > [Email Settings](#) , additional options will display here for SMTP Username and SMTP Password.

+		Primary	Reply-to
	test@example.com	<input checked="" type="radio"/>	<input type="radio"/>
	example@test.com	<input type="radio"/>	<input checked="" type="radio"/>
-			

Email Client:

- On the "Theme" tab, select a theme for this user. This will control the color scheme and style of Sugar when the user logs in. This will default to the option set in Admin > [Themes](#) .
 - The "Advanced" tab includes preference-type settings for this user. These are all specific to the user and do not affect system wide settings or other users. Options such as date and time format settings, timezone, and if the user will be notified by email when a record is assigned to them are available on this page. This page includes sections on "User Settings", "Layout Options", "Locale Settings", "PDF Settings", and "Calendar Options".
4. If the system-generated password feature is not enabled in [Password Management](#) , there will be a "Password" tab after User Profile. The administrator can manually enter a password for the user with this tab and provide it to the user. Please note the password requirements to the right of the password fields which will validate as you enter the password for the user.

Note: If the system-generated password feature is enabled, this tab will not be available. Instead, a password will be sent to the user upon completion of the creation process.

5. After entering the necessary information click the Save button.

Upon saving, an email will be sent to the user with the user's system generated password (if applicable), a corresponding Employee record will be created for the user, and the detail view will appear, allowing the administrator to assign [Teams](#) and [Roles](#) to the user.

Group Users

A group user cannot be 'logged in', but the name and user name will appear for other users as they view records assigned to the group user, or assign records to this user. The group user creation screen only contains four fields. For more information on the use of Group Users, please review the [Group User](#) section of this documentation. The setup of a Group User is as follows:

1. Navigate to Admin > User Management.
2. From the Users tab, select "Create Group User"

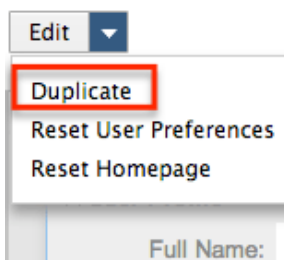
3. Enter a name and user name for this user.

- In "Email Settings", an email address or addresses can be added for the group user. The email addresses can also be marked as "Primary", meaning that this will be the first email address that shows for the user, and "Reply-to", where automatic notifications from Sugar will be sent. If your organization has a group inbox or alias for a team represented by the group inbox, it could be added here so that all notifications are sent to the entire team.
- Click "Save" to create the user.

Creating Via Duplication

Often, administrators will find themselves in situations where multiple users must be created at once, whether it be when they are first setting up Sugar, a new group of employees are going to be using Sugar. For this situation, one user can be configured and then additional users can be quickly set up using the Duplicate action available on the record's detail view. When duplicating a user, all fields are populated from the original record to the duplicated one, except for the "User Name" field and the password fields. To duplicate an existing user, follow the following steps:

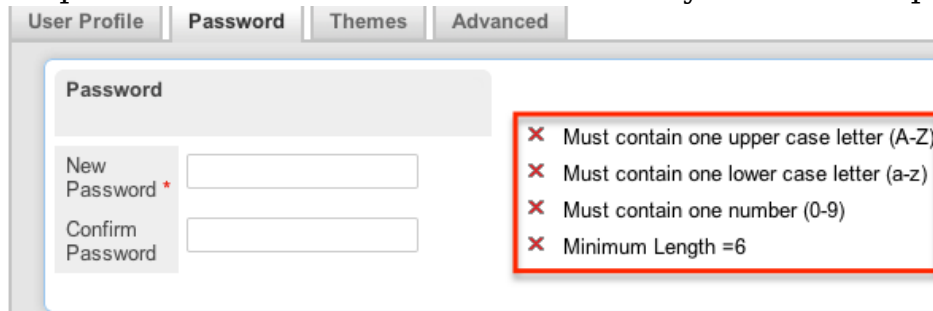
- Navigate to the detail view of the user you would like to duplicate.
- In the Actions menu, select "Duplicate".



- This will open an edit view for this new user with all fields populated as they

were on the original record, except for "User Name".

4. Populate the "User Name" for this new user and edit any other user fields or preferences to be specific to the new user. Fill in any information for the new user that did not exist on the original user.
5. If the system-generated password feature is not enabled in [Password Management](#) , there will be a "Password" tab after User Profile. The administrator can manually enter a password for the user with this tab and provide it to the user. Please note the password requirements to the right of the password fields which will validate as you enter the password for the user.



Note: If the system-generated password feature is enabled, this tab will not be available. Instead, a password will be sent to the user upon completion of the creation process.

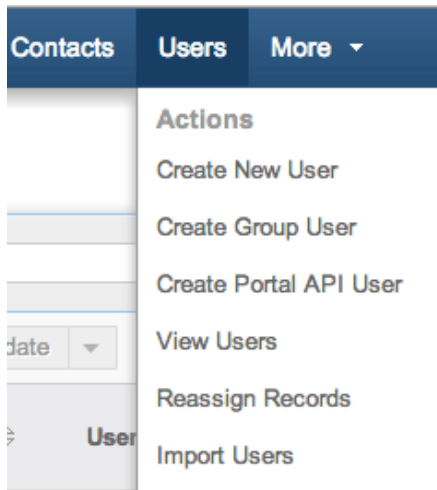
6. Click "Save"

The new user is now created and available for use. This process is applicable for all user types; Regular User or Administrator User, or Group User.

Creating Via Import

The import function in Sugar allows you to push multiple user records into Sugar using a comma (or other character) delimited file instead of creating them one-by-one. Use the following steps to import users via the Import Users option. For more information on importing records to Sugar, please refer to the [Import](#) documentation.

1. Hover on the Users module tab and select "Import Users".



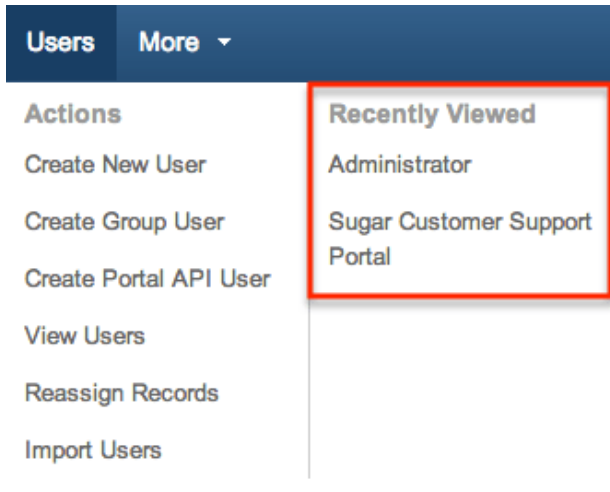
2. In Step 1, select the source of the data you are importing. Click "Next".
3. In Step 2, select the import file and choose "Create new records only". Click "Next".
4. In Step 3, confirm the import file properties. Click "Next".
5. In Step 4, confirm the field mappings for the import. Click "Next".
6. In Step 5, configure any fields you would like to use for duplicate checking.
7. In Step 6, view the import results.
 - The Created Records tab will show all the new contact records.
 - The Duplicates tab will show any records in the file that were detected as a duplicate and thus not imported from the duplicate check in Step 5 of the Import Wizard.
 - The Errors tab will show records that were not imported due to errors detected during import.

Viewing Users

There are various options available for viewing user records in Sugar including via Users recently viewed, Users list view, Users detail view, dashlets, and reports.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which users you have recently viewed. Hover on the Users module tab to see a list of your most recently viewed users and click each name to open the user in detail view.



Viewing Via List View

The Users list view displays all user records meeting the current search criteria. To access the list view, navigate to Admin > User Management. While the list view shows key user fields, you can click the user's name to open the record in detail view. For more information on viewing contacts via list view, please refer to the [Users List View](#) section of this documentation.

Viewing Via Detail View

The Users detail view displays thorough user information including all user fields followed by subpanels of the user's related records belonging to various modules. The detail view will also display the "User Holidays" subpanel, to be able to specify dates that the user will not be working. The detail view also provides the "Access" tab, which has the ability to add [Teams](#) and [Roles](#) for the user. Any admin user clicking a user record's link from anywhere in the application, including from the Users list view, can reach the detail view. For more information on viewing users via detail view, please refer to the [Users Detail View](#) section of this documentation.

Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets which allow users to get a quick view of various records, activities, reports, etc. Clicking a user's name from any dashlet will open the user in detail view for any user. An admin can then edit or make other changes to the profile. For more information on using dashlets, please refer to the Dashlets section of the [Home](#) documentation.

My Sugar Sales Marketing Support Tracker + Add Sugar Dashlets Change Layout

Calls					
Subject	Related to	Start Date	Accept?	Status	User
Left a message	TJ O'Rourke Inc	02/23/2013 05:15am		Planned	Max Jensen
Discuss review process	Smith & Sons	03/01/2013 07:00am		Planned	Sarah Smith

Top Opportunities				
Opportunity Name	Account Name	Amount	Expected Close Date	User
1000 Units	Riviera Hotels	\$50,000.00	02/24/2012	Will Westin
500 units	RRR Advertising Inc.	\$50,000.00	03/04/2012	Max Jensen

Viewing Via Reports

Administrators have the option to build, run, and manage reports to gather key data from records within Sugar. When building a report, there are options to either run the report from the Users module or add links to users related to the records that are being reported on. Once the report is run, you will be able to view the user record's detail view by clicking the user's name in the report results. Please note that you can only directly access user detail views with Rows and Columns and Summation with Details-type reports as Summation and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the [Reports](#) documentation.

Name: Users report
Modules: Users
Display Columns: User Name, Is Administrator, Status
Schedule: None
Filters: None

Type: Rows and Columns
Teams: Global
Assigned to: Admin

User Name	Is Administrator	Status
admin	<input checked="" type="checkbox"/>	Active
chris	<input type="checkbox"/>	Active
jim	<input type="checkbox"/>	Active

Searching Users

The Users module's list view includes Basic and Advanced Search functionality to help you locate users easily and effectively. Once the search is performed, the relevant search results will be displayed in the Users list view below. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to pull up all records that include the

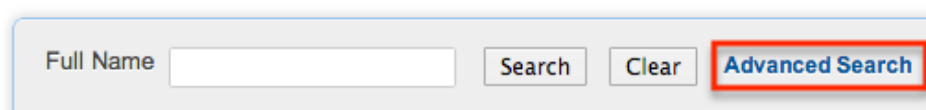
keyword entered in the search. If you would like to broaden the search, you can use the "Wildcard" (%) at the beginning of your text as well (e.g. %manager). This will pull up any record that has the word "manager" in the name, regardless of how it starts or ends (e.g. "Department Manager", "Product Manager" or "Project Manager").

For more information on using the various search methods as well as how wildcards are used, please refer to the [Search](#) documentation.

Basic Search

Basic search offers only Full Name as a searchable field. From the Basic search panel, you can click "Advanced Search" to access additional search functionality.

Search Users



The image shows a search interface for users. It features a text input field labeled "Full Name" with a light blue border. To the right of the input field are three buttons: "Search", "Clear", and "Advanced Search". The "Advanced Search" button is highlighted with a red rectangular border.

The buttons available in the Basic Search panel are also available in Advanced Search.

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.

When you run a search, Sugar will return records matching the criteria you typed in the Full Name search box. Once the search is complete, the relevant results will populate in the [list view](#) below the search panel. To see all user records, simply click "Clear" and then "Search" to perform a blank search with no filters.

Administrators can also configure what fields appear on the Contacts Basic Search via Admin > Studio. For more information on editing the Basic Search layout, please refer to the [Studio](#) documentation.

Advanced Search

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

The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the Layout Options section of the [Layout Options](#) documentation.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section of the documentation.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "Is Administrator" as "Yes" and enter in a "First Name" to search, Sugar will only return the user records with a matching first name that are admins. Once the search completes, the relevant results will populate in the [list view](#) below the search panel. To see all user records, simply click "Clear" and then "Search" to perform a blank search with no filters.

Administrators can configure what fields appear on the Contacts Advanced Search via Admin > Studio. For more information on editing the Advanced Search layout, please refer to the [Studio](#) documentation.

Users List View

The Users list view displays all user records meeting the current search criteria. You can view the basic details of each user within the columns of fields.

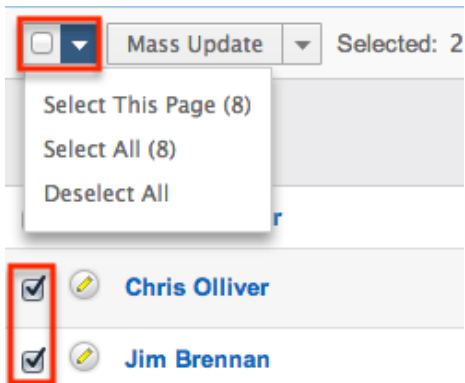
You have the option to change what fields are displayed in list view by configuring your layout options available in Users Advanced Search. For more information on configuring your list view, please refer to the Layout Options section of the Search documentation. You can also change what fields are visible in the list view via Studio. For more information on editing list view layouts, please refer to the [Studio](#) documentation.

Checkbox Selection

You can perform actions on user records directly from the list view by first selecting the desired records. To select individual user records on the Users list view, mark the checkbox on the left of each row. To select or de-select multiple

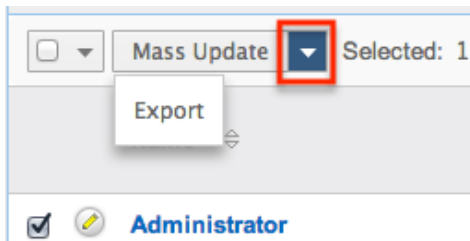
contact records on the list view, use the options in the checkbox dropdown menu.

- **Select This Page** : Selects all records shown on the current page of contact results.
- **Select All** : Selects all records in the current search results including all pages of contact results.
- **Deselect All** : De-selects all records that are currently selected.



More Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.



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

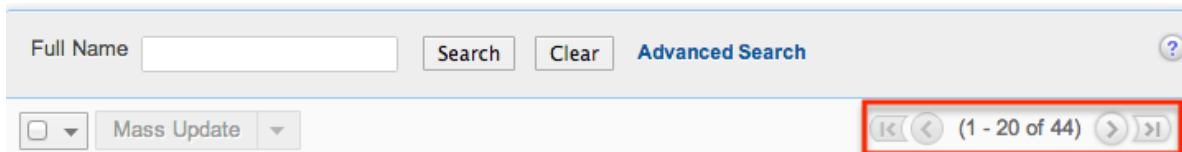
Menu Item	Description
Mass Update	Mass update one or more users at a time
Export	Export one or more users to a CSV file

Pagination

List view displays the current search results broken into pages that you can scroll through rather than potentially displaying thousands of rows at once. To the right

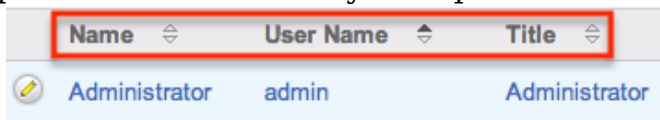
just below the search panel you can see which records of the total results set are currently being displayed. The two single-arrow next and previous buttons can be used to scroll through the records page-by-page. The two double-arrow first and last page buttons allow you to skip to the beginning or the end of your current results.

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



Column Sorting

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



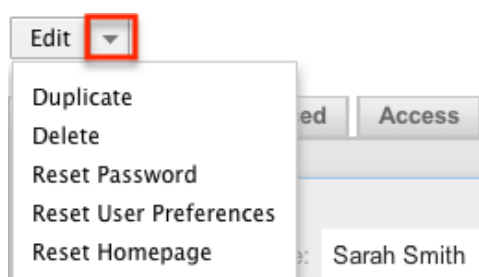
Users Detail View

The Users detail view displays thorough user information including all user fields which are grouped by default into the User Profile, Advanced, and Access panels. You can also view information from records related to the Users module as subpanels below the detail view. For more detailed information about adding relationships, please refer to the [Relationships](#) section of the Studio documentation. The detail view can be reached by clicking a user record's link from anywhere in the application including from the Users list view.

Administrators have ability to change what fields are visible in the detail view by configuring the field groupings via Admin > Studio. For more information on editing detail view layouts, please refer to the [Studio](#) documentation.

Actions Menu

The Actions menu on the top left of each user's detail view allows you to perform various actions on the current record. Please note that administrators in Sugar can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on how to configure the actions menu, please refer to the [System](#) documentation.



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

Menu Item	Description
Edit	Edit this user
Duplicate	Duplicate this user
Delete	Delete this user
Reset Password	Remove the user's current password and email a new one
Reset User Preferences	Revert all user preferences back to system-wide settings
Reset Homepage	Revert the user's Home screen back to out of the box settings

Tabs

The detail view for a user is broken up into multiple tabs to better organize the different fields available in the Users module. Among possible tabs are User Profile, Themes, and Advanced. A Downloads tab is also available when viewing your own profile. For more information on viewing your own user profile, please review the [User Preferences](#) documentation.

User Profile

The User Profile tab shows information specific to the user. This includes the user's name, user name, employment status, and contact information. An

administrator in [Studio](#) can edit this page layout.

To edit the information for the specific user on this page, please refer to the [Editing Via Detail View](#) documentation.

Themes

The Themes tab is not available on the detail view of the Users module, but it does appear while in edit view. Using this tab, you are given the option to choose one of themes made available in Admin > Themes. A preview of the theme will appear in the panel of the theme tab to show what it will make Sugar look like. For more information on the different themes in Sugar, please refer to the [Themes](#) documentation.

Advanced

The Advanced tab shows information specific to the user's preferences in Sugar. This information includes user settings, locale settings, PDF settings, calendar options, and layout options. The layout of this screen cannot be edited in Studio. However, to edit the information contained on this page, please refer to the [Editing Via Detail View](#) documentation.

Access

The access screen summarizes the Team and Role settings for the user so that they can conveniently be seen in one location. This screen comprises of a role access table, a "Roles" subpanel, and the "My Teams" subpanel.

- **Role Table** : This represents a summary of the user's role restrictions. This table is very similar to what shows in Admin > Role management, but this table in Users is not editable. The table is an easy way to see a combination of all of the roles that the user is associated with at one time.
Note: When there is more than one role assigned to a user, the most restrictive value will take precedence. For example, if one role allows the user to delete any record, and the other role does not allow the user to delete any records, the latter will take effect and the user will not be able to delete. The table will have the modules listed down the left hand side, and the action type listed along the top row. The intersections of the row and column will show what the user does or does not have access to regarding their access and access type, or their abilities to delete, edit, export, import, list, mass update, and view records. For additional information on role settings, please refer to the [Roles](#) documentation.

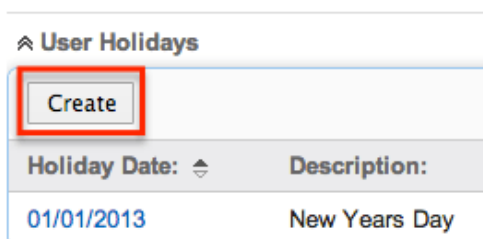
Advanced		Access	
	Access	Access Type	Delete
Accounts	Enabled	Normal	None

- Roles Subpanel : The Roles subpanel will list all of the roles, and the description of the role, that the user is associated with. This breakdown of roles runs in conjunction with the role table mentioned before. Roles can be added or removed from the user from this subpanel. The name of the role is also a link, which will open the role's detail view.
- Teams Subpanel : The Teams subpanel will list all of the teams, and the description of the team, that the user is associated with. Teams can be added or removed from the user from this subpanel. The name of the team is also a link, which will open the team's detail view. For additional information on Team settings, please refer to the [Teams](#) documentation.

Subpanels

Subpanels can be added to the users module using relationships between other modules and Users. Subpanels appear at the bottom of the detail view for the user. To add additional subpanels via relationships, please refer to the [Relationships](#) section of the Studio documentation.

The User Holidays subpanel is the only subpanel available for the Users module out of the box. This subpanel allows administrators to select specific days that the user will not be working. This is used when calculating timing on the projects module. Holidays can be added using the Create button and inputting a date and description of the holiday.



For more information about Projects, please refer to the [Projects](#) section of the Application guide.

Editing Users

Users can edit their own profiles, or administrators can do this for them. Changes to a user record are necessary to update contact information or personal settings

for the user for their preferences as they use Sugar. Administrators can edit records from detail view, list view, or from reports. When editing from within the Users module, you are presented with a full form edit view, with all of the necessary fields at your disposal.


^ User Profile

User Name: *

Status: *

User Type:

User can access modules and records based on team

Picture: 

^ Employee Information

Employee Status:

Title:

When editing a record from a list view or a report, you will be presented with a quick edit form. When using a quick edit, only a select few fields are available for editing, but you can click the "Full Form" button to be presented with the full edit view and access all fields. Both the Edit View and Quick Edit (Quick Create) forms can be edited through [Studio](#) .

Administrator

User Name: *

Status: *

Email Address: *

 Primary Reply-to

First Name:

Last Name: *

User Type:

Employee Status:

Title:

Department:

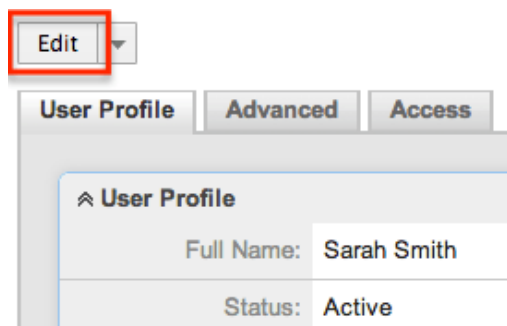
Display Employee Record:

Work Phone:

Reports to:

Editing Via Detail View

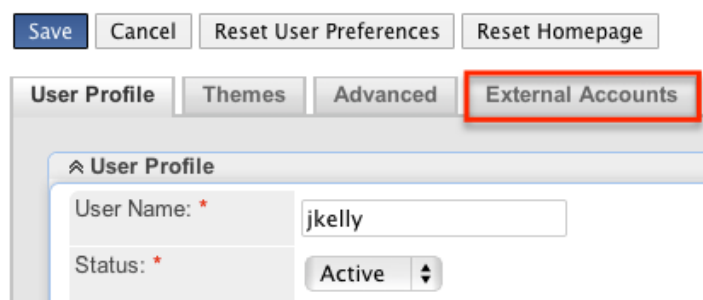
You can edit users via the detail view by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve the changes made. For more information on the detail view, please refer to the [Users Detail View](#) section of this documentation.



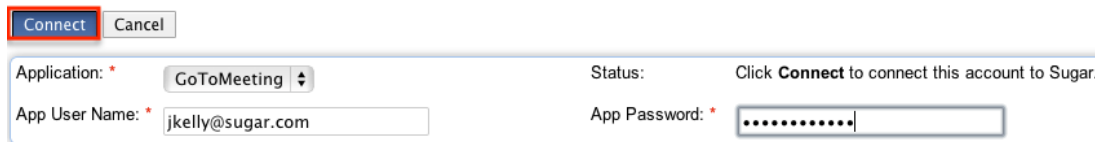
External Accounts

When viewing the edit view of a user, one of the available tabs will be "External Accounts" which will be after the "Advanced" tab. The External Accounts functionality allows you to connect other applications to Sugar, such as GoToMeeting, Google Drive (Google Docs), and WebEx. To create an external account record, follow the following steps:

1. Navigate to the [detail view](#) of the user to whom you would like to add the account.
2. Click on the External Accounts tab.



3. Click "Create" to open the external account's edit view.
4. Select the Application you will be connecting to from the "Application" dropdown field. The selection here will change the fields that are available on the rest of the page. The list will include GoTo Meeting, Google, and Webex. This list will change depending what applications are connected via the [Connectors](#) menu in the System section of the Admin menu.
5. Enter the necessary information for the external application and click "Connect"




Should you wish to prevent users from creating external accounts, you can remove the Create button for users in the External Accounts tab of their profiles by disabling the External Accounts module via a [role](#) assigned to those users. Please note the "Access Type" setting will not affect this module. Furthermore, editing or deleting the external account can be done by clicking the accounts name on the External Account list view. This brings you back to the edit view with the necessary options and available fields.

The out of the box connectors perform the following functions:

- **GoToMeeting** : The GoToMeeting connector allows you to create meetings in Sugar that are tied to your GoToMeeting account and will show as such on your GoToMeeting account. This allows the user to, after creating the Sugar meeting record, start the GoToMeeting directly from within Sugar's [Meetings](#) module.
- **Google** : The Google connector allows you to create [documents](#) within Sugar that, instead of uploading a file to the server hosting Sugar, allows the user to link to an existing Google document from Google Drive or to upload a file to that account. When clicking on a document name in the Documents module or any Documents subpanels, the user will be brought to Google Drive instead of the download being initiated.
- **WebEx** : The WebEx connector allows you to create meetings in Sugar that are tied to your WebEx account and will show as such on your WebEx account. This allows the user to, after creating the Sugar meeting record, start the WebEx meeting directly from within Sugar's [Meetings](#) module.

Editing Via List View

You can edit users via the list view by clicking the Pencil icon to the left of each user's name. A pop-up window will open with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. For more information on the list view, please refer to the [Users List View](#) .

	Name	User Name	Title
	Administrator	admin	Administrator

Editing Via Reports

Sugar reports also allow you to edit a user record by clicking on the pencil icon next to a user's name. This opens a pop-up window with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. Please note that you may only directly edit users from Rows and Columns-type or Summation with Details-type reports, as Summation-type and Matrix-type reports do not include the pencil icon. For more information on reports, please refer to the [Reports](#) documentation.

The image shows two screenshots from a SugarCRM interface. The top screenshot displays report configuration details for a report named "Users report". The configuration includes: Name: Users report, Type: Rows and Columns Report, Modules: Users, Teams: Global, Display Columns: User Name, Is Administrator, Status, Assigned to: Administrator, Schedule: None, and Filters: ^.

The bottom screenshot shows a data table with the following columns: User Name, Is Administrator, and Status. The table contains one row with the user "admin", a checked checkbox for "Is Administrator", and the status "Active". A red box highlights a pencil icon next to the "admin" user name, indicating the edit function.

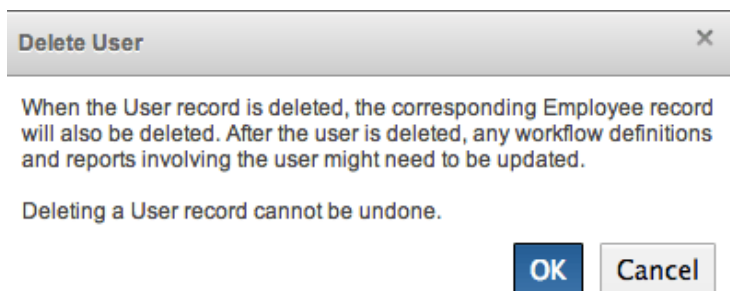
User Name	Is Administrator	Status
admin	<input checked="" type="checkbox"/>	Active

Deleting Users

If a user record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from the Users detail view. Deleting user records will not delete any related records and will only remove the user from showing in any lists or other records. When a user is no longer a member of the organization, it is best to deactivate users by changing the "Status" field to "Inactive" instead of deleting them. This way, any historical information tied to the user will still be available, but the user will no longer be able to log in.

Use the following steps to delete a contact user via the detail view:

1. Navigate to the user's detail view via Admin > User Management and selecting the user from the list view.
2. Select "Delete" from the [Actions Menu](#) of the detail view.
3. An error box will appear confirming the delete process and outlining the effects. Click "OK" to proceed.

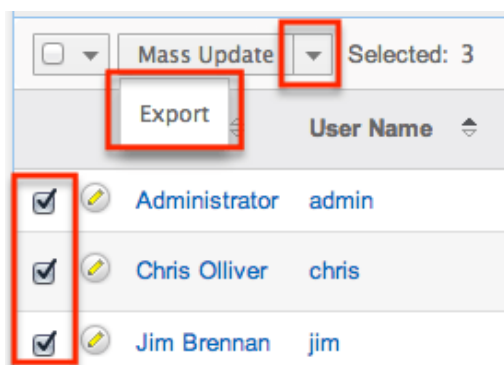


4. You will then be presented with the Reassign Records tool. Follow the steps on this page to complete the deletion. For more information on the Reassign Records functionality, please review the [Reassigning Records](#) section of this documentation.
5. Once your Reassign Records is complete, the user is deleted and you can freely navigate around Sugar.

Exporting Users

Sugar's Export option allows users to download all fields for the selected users to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use User data with other software such as Microsoft Excel or to update existing records by exporting, making changes, and then importing the altered users back into Sugar. For more information on updating existing records via import, please refer to the [Import](#) documentation.

Users may be exported from the Users list view by selecting "Export" from the Actions menu. User data can also be exported via the Reports module by creating or accessing reports containing specifically chosen fields for users and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the [Export](#) documentation.



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

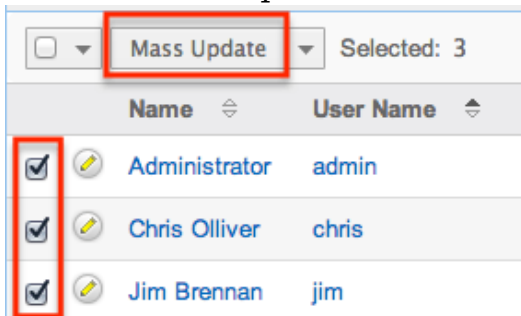
records in smaller batches.

Mass Updating Users

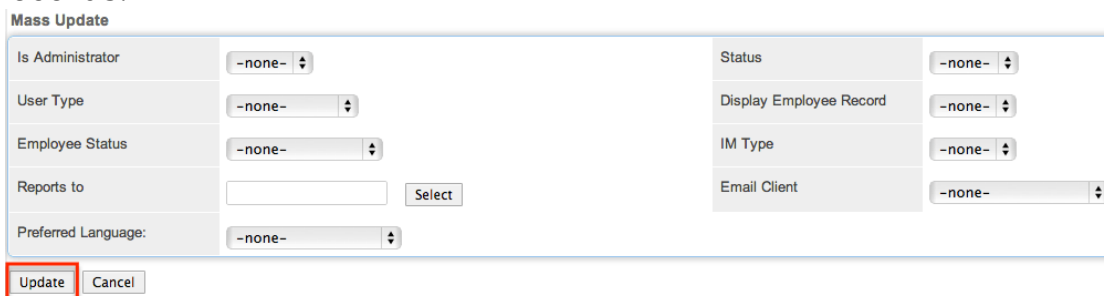
Mass Updating allows users to make the same change to multiple user records at once from the Users list view. Users with administrator or developer level access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. Due to PHP memory limitations on the server, there may be occasions when the application times out while updating a large number of user records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches. For more information on configuring mass update, please refer to the [Studio](#) documentation in the Administration guide.

Use the following steps to mass update user records from the list view:

1. Navigate to the Users list view by clicking the User Management from the Admin menu.
2. Use the list view's [Basic](#) or [Advanced Search](#) to identify users you wish to modify.
3. Select the desired users individually or using the [checkbox dropdown's](#) options.
4. Choose "Mass Update" from the Actions menu.



5. Scroll to the Mass Update panel and set values for the fields you wish to alter.
6. Click "Update" to save the changes to all of the currently selected contact records.



The screenshot shows the 'Mass Update' panel with the following fields:

Is Administrator	-none-	Status	-none-
User Type	-none-	Display Employee Record	-none-
Employee Status	-none-	IM Type	-none-
Reports to	<input type="text"/> Select	Email Client	-none-
Preferred Language:	-none-		

At the bottom, there are 'Update' and 'Cancel' buttons. The 'Update' button is highlighted with a red box.

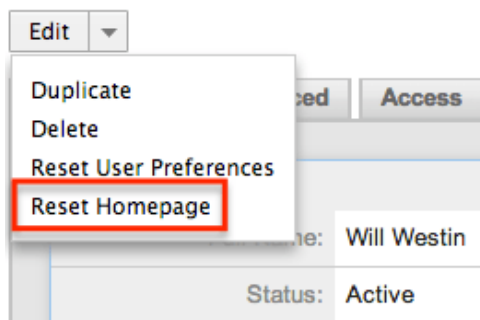
Resetting User Homepages

Users have the option to control what dashlets they see on their Home screen. If there have been changes to the Home page that are not wanted, Sugar provides an option to revert specific user's homepages back to the out of the box layout. Using this action will remove all dashlets, any changes to existing dashlets, and any additional tabs added to the user's Home page. This action cannot be undone.

Note: If the user is currently logged in, the changes will not take effect until the user is logged out and then back in.

Use the following steps to reset a user's home page:

1. Navigate to the user's detail view via Admin > User Management and selecting the user from the list view.
2. Select "Reset Homepage" from the [Actions Menu](#) of the detail view.



3. An error box will appear confirming the reset. Click "OK" to proceed.

Resetting User Preferences

As users make changes while navigating around Sugar, their preferences are stored in the Sugar database. This includes preferences such as placement of subpanels, sort orders on list view, previous searches on both basic and advanced searches, and settings in the Advanced tab of the User Profile. If there have been unwanted changes and the user would like to start fresh, the "Reset User Preferences" option can be used to undo all preferences saved by Sugar. This will revert the specific user's preferences back to the out of the box settings. This action cannot be undone.

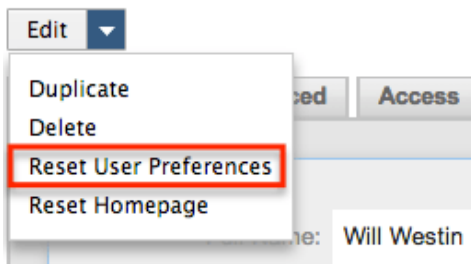
Note: If the user is currently logged in, the changes will not take effect until the user is logged out and then back in.

Note: Resetting a user's preferences is the only way to allow a user access to Sugar if they have been locked out using the [Login Lockout](#) feature in Password

Management.

Use the following steps to reset a user's preferences:

1. Navigate to the user's detail view via Admin > User Management and selecting the user from the list view.
2. Select "Reset User Preferences" from the [Actions Menu](#) of the detail view.



3. An error box will appear confirming the reset. Click "OK" to proceed.

Resetting User Passwords

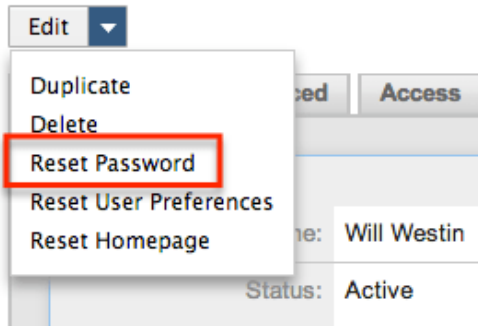
Administrators have the option to manually set or reset user's passwords as need be. Setting a regular user's password is done simply through the Users module via Admin > User Management. The method used to reset the password will vary depending on the system-generated password feature in Admin > [Password Management](#) .

If the option is enabled, there will be a "Reset User Password" option in the More Actions menu of the user's detail view. Selecting this option will delete the user's current password and automatically email the user a new one. This action cannot be undone.

Note: If the user is currently logged in, the changes will not take effect until the user is logged out and then back in.

Use the following steps to reset a user's home page:

1. Navigate to the user's detail view via Admin > User Management and selecting the user from the list view.
2. Select "Reset User Preferences" from the [Actions Menu](#) of the detail view.

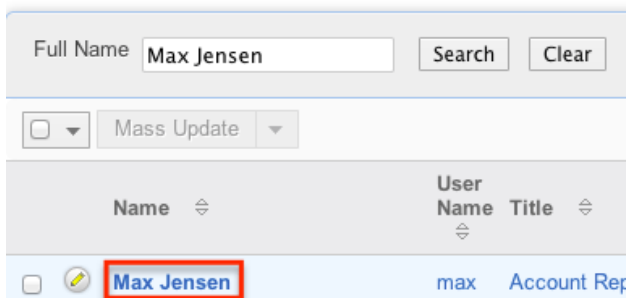


3. A message box will appear confirming the reset. Click "OK" to proceed.

If the system-generated password feature is disabled in Admin > Password Management, administrators will be able to define a user's password through User Management using the following steps:

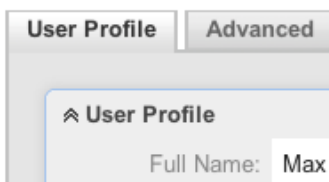
1. Navigate to the user's profile via the Users list view in Admin > User Management.

Search Users



2. Open the user's profile and click edit.

Max Jensen



3. Click on the "Password" Tab and enter the new password for this user.

Save Cancel Reset User Preferences Reset Homepage

User Profile **Password** Themes Advanced External Accounts

Password

New Password

Confirm Password

- ✗ Must contain one upper case letter (A-Z)
- ✗ Must contain one lower case letter (a-z)
- ✗ Must contain one number (0-9)
- ✗ Minimum Length =5 and Maximum Length =10

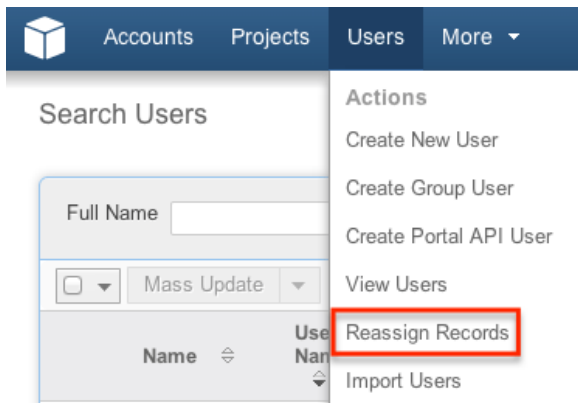
4. Click "Save" to confirm your change and complete the process.

Reassigning Records

Reassign Records is a tool available in the Users module for administrators to change the "Assigned To" and "Team" fields for one specific user's records. This is best used when a user is changing departments, teams, or roles within the organization, or if the user is no longer an employee or using Sugar. The Reassign Records tool is automatically presented when deleting or deactivating a user. Reassigning Records cannot be undone.

Use the following steps to reassign records:

1. Navigate to the users module via Admin > User Management.
2. Hover on the Users module tab and select "Reassign Records".



3. Select the user to whom the records are already assigned
4. Select the user to whom the records will be assigned after the reassignment.
Note: These can be the same if you are just changing the team of all of the user's records.
5. Select which team(s) the records will be assigned to after the reassignment.
6. Use the multiselect field for "Modules to Include in Reassignment". Modules can be multi-selected by clicking options while holding the "Control" button while using a PC or "Command" while using a Mac.

Next > Clear Cancel

From User:
Chris Olliver

To User:
Sally Bronsen

Set Teams to:

+ Primary

Global

West

Modules to Include in Reassignment:

- Accounts
- Bug Tracker
- Calls
- Campaigns
- Cases
- Contacts

7. Selecting specific modules will include filters related to the module. Use these if you do not want to include all records assigned to the user. A list of the modules and their filter fields is listed here:

Module	Filter Field
Accounts	Type
Bug Tracker	Status
Calls	Status
Cases	Priority
	Status
Opportunities	Sales Stage
	Type
Tasks	Status

After selecting any filters, click "Next" to access the reassignment summary. If you would like to see a detailed list of the changes that were made, click "Verbose Output". This list will include a link to the changed records and a summary of changes that were made.

If you would like the changes to show in the Change Log for the changed record, have any relevant [workflows](#) fire, and have assignment notifications be sent, click the checkbox for "Include Workflow/Notifications/Audit". This process performs a much large set of actions than the regular Reassign Records actions, so the time to complete this process could be much higher

than without.

Assessing Accounts

0 records from Accounts will be updated.
 Include Workflow/Notifications/Audit (significantly slower)

Assessing Cases

10 records from Cases will be updated.
 Include Workflow/Notifications/Audit (significantly slower)

Assessing Contacts

39 records from Contacts will be updated.
 Include Workflow/Notifications/Audit (significantly slower)

Click "Next" to complete the reassignment.

The final summary page will show how many records were affected and if any errors occurred during the reassignment. Click "Return" to return to the main screen of the Reassigning Records tool.

Processing Contacts

Update complete
76 Successful
0 Failed

Due to PHP memory limitations on the server, there may be occasions when the application times out while reassigning a large number of user records. If you encounter an error when performing this action, we recommend reassigning records in smaller batches via each module's mass update option.

Last Modified: 07/11/2016 12:09pm

Sugar Connect

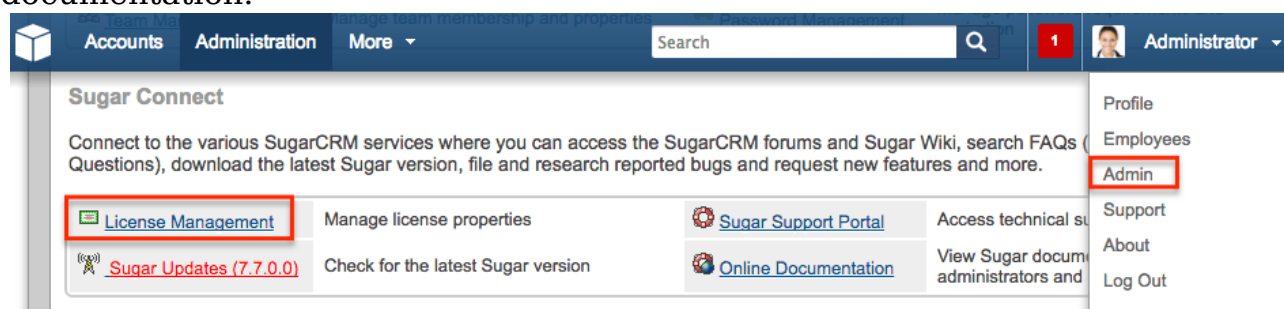
Overview

The Sugar Connect section of the Administration page allows you to connect to various SugarCRM online resources such as License Management, Sugar Support Portal, Sugar Updates, and Online Documentation. Other than License Management and Sugar Updates, which are only accessible to users with administrator access, Sugar's Support page and online documentation can be

accessed by all user's via their Sugar account or directly from the SugarCRM website. This documentation will cover how to manage your Sugar license, check for Sugar updates, as well as access Sugar's support and online documentation page.

License Management

The License Management page allows administrators to manage their Sugar license properties. You can use this option to manage the Sugar license for your organization and view information such as the download key, expiration date, number of users, etc. System administrators can also edit and re-validate the license via the License Management page. Please note that your commercial edition of Sugar is purchased with a set number of licenses that allow users to access the application. All active system administrator's as well as regular non-admin user's count towards the number of purchased Sugar licenses. For more information on the various user types (i.e. regular user, system administrator, group user, etc.) available in Sugar, please refer to the [User Management](#) documentation.



Download Key

The download key is a 32 digit alphanumeric key that is unique to your Sugar account. The number of user licenses your organization purchased, as well as the subscription expiration date is tied to your download key. Upon purchasing Sugar, you will receive a Welcome email containing your download key information which will need to be entered during installation of the Sugar application. Once the download key is entered in the system, the corresponding information such as the expiration date, number of users, number of offline client licenses, and number of concurrent self-service portal users will automatically populate and be displayed in Admin > License Management.

Editing the License Key

Although rare, there may be times when system administrators will need to edit

their license key via Admin > License Management. For example, if you change your Sugar edition (e.g. Corporate to Professional), a new license key may be generated and provided by SugarCRM. You will need to update the License Management page with the new license key to associate your account to the new Sugar edition.

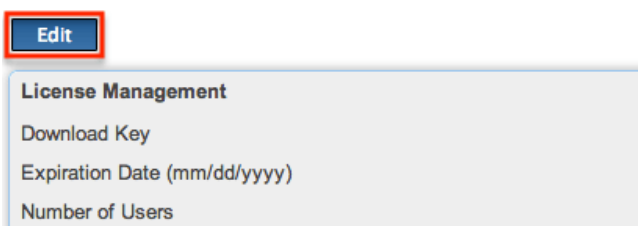
The fields in the License Management panel are as follows:

- Download Key : The download key associated to your Sugar subscription.
- Expiration Date : The date your Sugar license expires.
- Number of Users : The number of users allowed to access Sugar based on the number of purchased licenses.
- Number of Offline Client Licenses : The number of offline clients associated with your license key.
- Number of Concurrent Self-Service Portal Users : The number of self-service portal users associated with your license key.

The following steps cover editing the license key for your account when changing Sugar editions as an example:

1. Navigate to Admin > License Management.
2. Click the Edit button and enter the download key associated to your new Sugar edition.

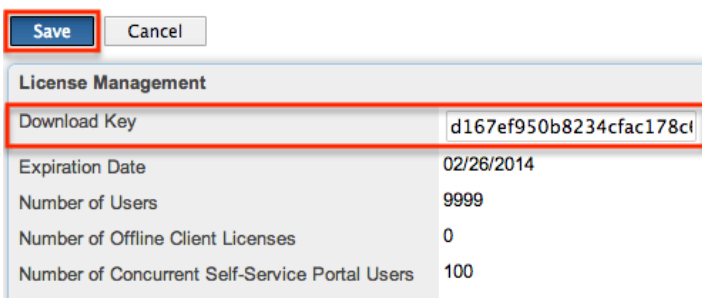
License Management



The screenshot shows the 'License Management' panel. At the top left, there is a blue 'Edit' button with a red border. Below it, the panel title 'License Management' is displayed. Underneath, there are three labels: 'Download Key', 'Expiration Date (mm/dd/yyyy)', and 'Number of Users'. The 'Download Key' field is currently empty.

3. Once the download key is entered, click "Save".
 - The expiration date, number of users, etc. will automatically be updated based on the new download key.

License Management



The screenshot shows the 'License Management' panel after the 'Save' button has been clicked. At the top left, there are two buttons: a blue 'Save' button with a red border and a grey 'Cancel' button. Below them, the panel title 'License Management' is displayed. Underneath, there are five labels with corresponding values: 'Download Key' (d167ef950b8234cfac178c), 'Expiration Date' (02/26/2014), 'Number of Users' (9999), 'Number of Offline Client Licenses' (0), and 'Number of Concurrent Self-Service Portal Users' (100). The 'Download Key' field and its value are highlighted with a red border.

Please note that when you save the new license key information, the system automatically checks it against the information in the SugarCRM database to make sure it is valid.

License Validation

The License Validation panel of the License Management page allows administrators to re-validate their license as necessary. Sugar automatically re-validates your license once every 90 days as long as a system administrator logs into Sugar within the 90 day period. However, if your system fails to communicate with the License Validation server through the internet or you are behind a firewall; you will have to re-validate the license via Admin > License Management. If the re-validation is successful, the Status field in the License Validation panel will display the timestamp of the successful validation. The validation key expiration date will be 90 days from the date of the last successful validation date.

License Expiration

Typically, Sugar licenses are purchased for a one year period (e.g. 01/03/2013 to 01/03/2014). Please note that you will be notified of your upcoming subscription renewal via email or call and a notification will appear in the Sugar cube on the upper left of your Sugar account regarding your license expiration. If the subscription is renewed past the expiration date, then administrators must re-validate their license via Admin > License Management in order to update the account with the new subscription. If the administrator does not re-validate the license, regular users will be prohibited from logging into Sugar until the license is successfully validated by the administrator.

Re-validating the License

Although Sugar automatically re-validates your license once every 90 days, there may be special circumstances where administrators must re-validate the license via License Management. For example, if you renew your subscription after the expiration date or if you purchase additional users mid-term, you will have to re-validate the license via Admin > License Management in order to update your Sugar account with the new subscription.

The fields in the License Validation panel are as follows:

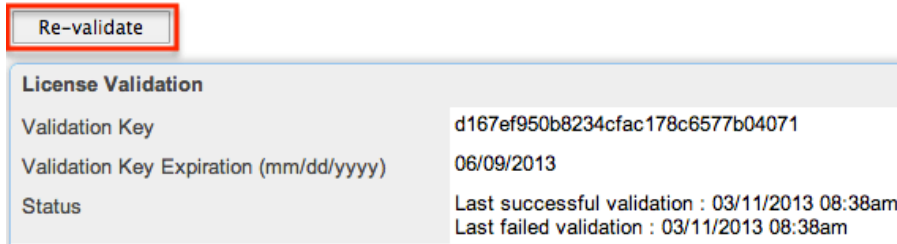
- Validation Key : System generated validation key associated to your Sugar subscription.
- Validation Key Expiration : The date the validation key expires. The expiration

date is typically 90 days from the last successful validation date.

- Status : The status displaying the timestamp of the last failed or successful validation.

Use the following steps to re-validate the license in Sugar:

1. Navigate to Admin > License Management.
2. Click the Re-validate button.



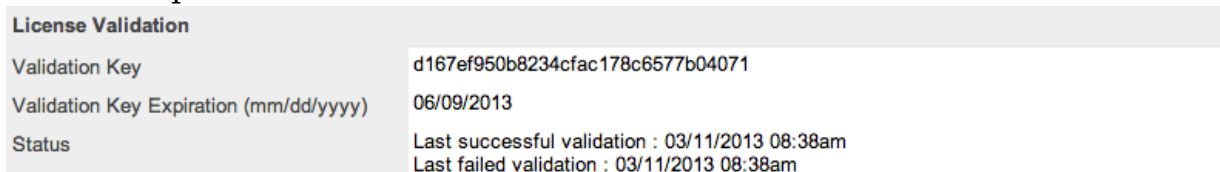
The system will communicate with the License Validation server to validate your license based on your Sugar subscription. If the re-validation is successful, then the status will reflect the date and time of the successful validation. If the system fails to connect successfully with the License Validation server and you cannot re-validate your license, use the [Manual Validation](#) option at the bottom of the License Validation panel.

Manual Validation

If your system fails to communicate successfully with the License Validation server through the internet, you have the option to perform a manual validation via Admin > License Management.

Use the following steps to perform a manual validation in Sugar:

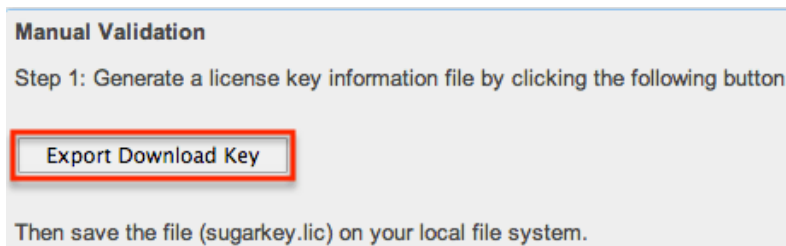
1. Navigate to Admin > License Management.
2. Click the Manual Validation link located at the bottom of the License Validation panel.



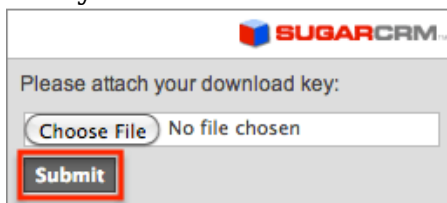
If you experience persistent problems with automatic validation, please check your Proxy configuration in the [System Settings](#) admin panel. If your system environment prohibits your system from communicating to the license validation server through the internet, you should proceed with the [Manual Validation](#) steps.

3. Click the Export Download Key button to export the sugarkey.lic file. Select "Save to Disk" in the pop-up window to save the file to your local machine

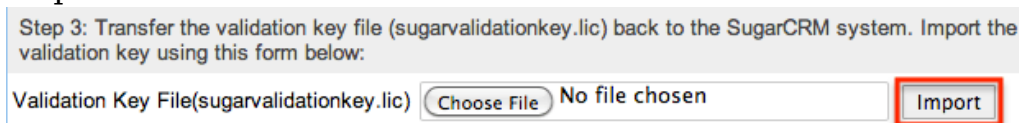
then click "OK".



4. Go to <http://updates.sugarcrm.com/license> and submit the sugarkey.lic file for validation.
 - o If the validation is successful, the validation key file (sugarvalidationkey.lic) will be generated, and the system will prompt you to save the file.



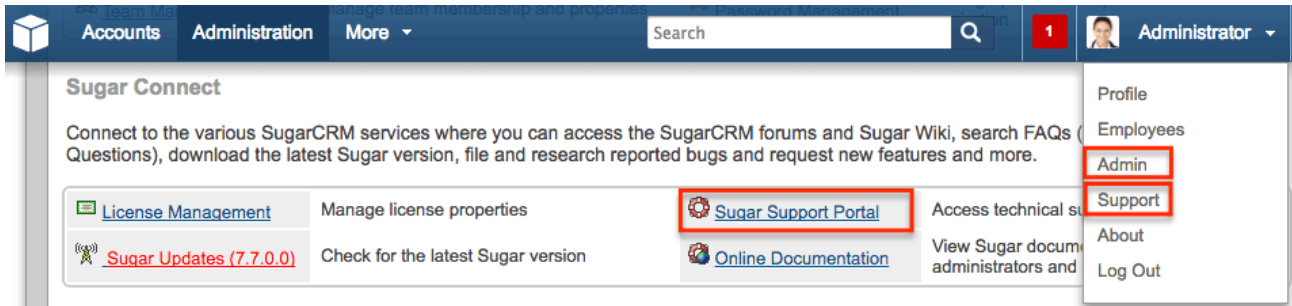
5. Log back in to your instance and navigate to the Manual Validation page (Admin > License Management > Manual Validation).
6. Choose the sugarvalidationkey.lic file on your local machine and click "Import".



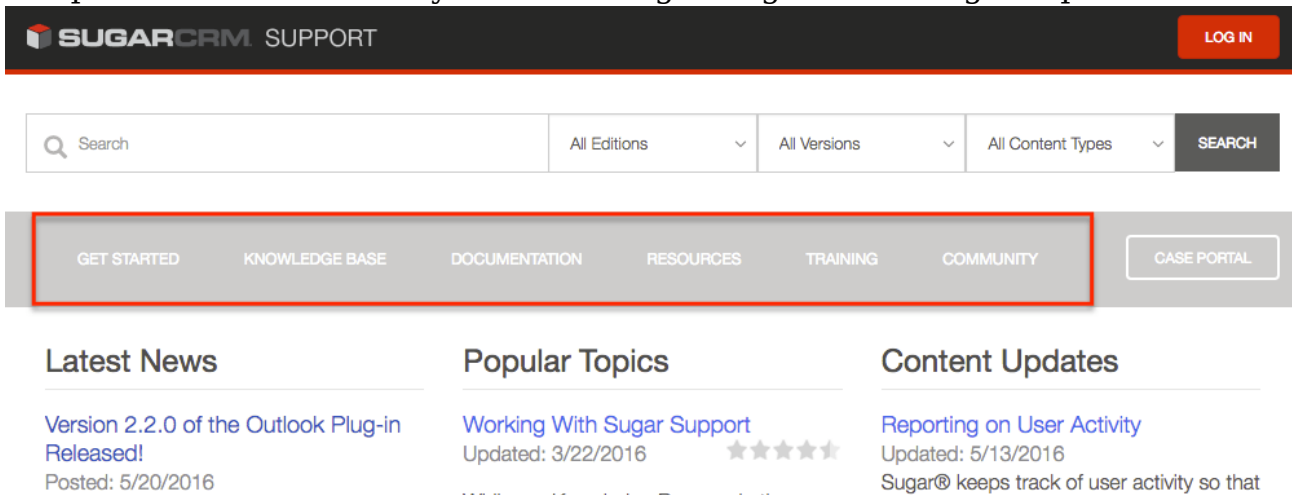
Once the validation key is imported successfully, you have completed the manual validation process. Sugar will update the validation status along with the Validation Key Expiration date for the license key.

Sugar Support Portal

The SugarCRM Support page provides access to various Sugar Support resources such as the case portal, documentation, knowledge base, training, etc. Administrators can access the support page via Admin > Sugar Support Portal, but it can also be accessed by all users simply by clicking "Support" under the user menu on the upper right of Sugar. To access Sugar's Support page outside of your Sugar instance, simply navigate to the SugarCRM Support page (<http://support.sugarcrm.com>) on your web browser.



The Get Started section of the Support page provides users, administrators, and developers with the appropriate resources to get them started in utilizing, configuring, and customizing the application. The Knowledge Base section provides articles based on various topics and areas of Sugar. The Documentation section provides the various user guides, administrator guides, etc. specific to Sugar. For more information on viewing documentations, please refer to the [Online Documentation](#) section of this page. The Resources section allows you to manage your subscription account, view purchased orders, download purchase software, view the On-Demand hosting information, etc. It also provides key information on supported versions and platforms to ensure you are running Sugar in the best performing environment. The Training section provides access to Sugar's self-help area where you can learn how to use various parts of the application via classes, videos, etc. The Community section allows you to access the SugarCRM Community page where you can search and view posts as well as ask questions to community members regarding various Sugar topics.



Submitting Cases Via Case Portal

While our Knowledge Base and other online resources (e.g. documentation, training, resources, etc.) are available for all Sugar users, subscribers to our paid editions also have the ability to contact Sugar Support for assistance. Support Authorized Contacts (Individual in your organization designated to work with SugarCRM Support) can submit cases to Sugar Support via the Case Portal. The

case portal allows you to access all historical cases for your organization and view responses from Sugar Support on existing cases as well as post responses. When creating a case, please include as much detail as possible regarding your issue or question as this will allow Sugar Support to resolve your issue as quickly as possible without needing to spend additional time and communication gathering more information.

Use the following steps to submit cases via Sugar's case portal:

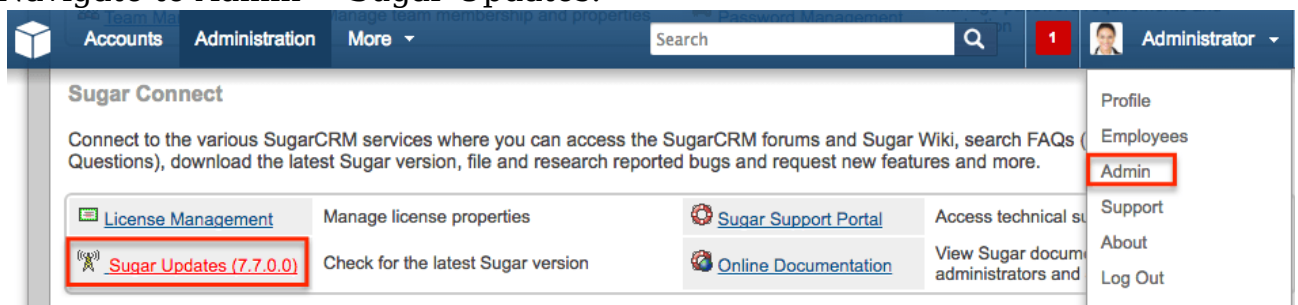
1. Navigate to the [SugarCRM Support page](#).
2. Click the CASE PORTAL button to the far right of the navigation bar.
3. Enter your SugarCRM.com account user name and password.
4. Click the New Case button at the top of the page to complete the case form with the necessary details. Your case will be assigned to a Sugar Support team member and responded to promptly.

Sugar Updates

The Sugar Updates page allows administrators to check for the latest available Sugar versions. By default, Sugar automatically checks for updates on a periodic basis to see if any version updates are available for your instance. If a new version update is available, the Sugar Updates link in the Admin page will appear red and display the latest Sugar version next to it. Administrators can uncheck the automatic updates option in the Sugar Updates page if they do not wish to have the system automatically check for updated version releases.

Use the following steps to perform a manual check for Sugar updates:

1. Navigate to Admin > Sugar Updates.



2. Click the Check Now button to see if a new update of Sugar is available.

Sugar Updates

Save Cancel * Indicates required field

Sugar Updates

The Sugar Updates mechanism allows your server to check to see if an update for your version of Sugar is available.

Automatically Check For Updates - If checked, the system will periodically check to see if updated versions of the application are available. If this box is unchecked, an admin will be required to manually revalidate after system license expires, otherwise users will be unable to login.

Check Now

You have the latest version available

If there is an available version update, a message will appear below the Check Now button with the latest version along with a message to visit support.sugarcrm.com to retrieve and download the latest version. Please note that On-Demand clients are normally upgraded by the SugarCRM team on a predetermined schedule as releases are made available. On-Site clients will need to perform the upgrade themselves as Sugar is hosted on their servers. If the system detects that you have the latest version of Sugar, then the message will inform you that you have the latest version available.

Online Documentation

Administrators can easily access the documentation for their current Sugar version and edition via Admin > Online Documentation.

The screenshot shows the SugarCRM Administration interface. The top navigation bar includes 'Accounts', 'Administration', and 'More'. A search bar and a notification bell are also present. The user is logged in as 'Administrator'. The main content area is titled 'Sugar Connect' and contains several links: 'License Management', 'Sugar Updates (7.7.0.0)', 'Sugar Support Portal', and 'Online Documentation'. The 'Online Documentation' link is highlighted with a red box. A dropdown menu is open for the 'Administrator' user, showing options like 'Profile', 'Employees', 'Admin', 'Support', 'About', and 'Log Out'. The 'Admin' and 'Support' options are also highlighted with red boxes.

A new window will open directing you to the appropriate Administration Guide, which provides information about configuring and administering your Sugar instance. You can view specific sections of the Administration guide by selecting the various topic links (e.g. Users, System, Email, etc.) on the main page or from the Administration Guide tree menu to the left. You can also access the relevant Application Guide which provides information about the functionality available to end users. Simply click the down arrow at the top of the menu to the left of the Administration Guide and select the Application Guide link (e.g. Sugar Ultimate 6.5 Application Guide). To learn more about a specific module in Sugar, select the appropriate topic link (e.g. Accounts, Contacts, etc.) on the main Application Guide page or from the menu on the left.

The screenshot shows the SugarCRM documentation interface. At the top is a navigation bar with tabs: GET STARTED, KNOWLEDGE BASE, DOCUMENTATION (highlighted), RESOURCES, TRAINING, and COMMUNITY. A CASE PORTAL button is on the right. On the left is a sidebar for 'Sugar Ultimate 6.5 Administration Guide' with a dropdown arrow and a list of topics: Introduction, Admin Wizard, Team Management, Role Management, Password Management, User Management, Sugar Connect, > System, Email, and > Developer Tools. The main content area shows the breadcrumb 'SugarCRM Support » Documentation » Sugar Versions » 6.5 » 6.5 Ultimate » Sugar Ultimate 6.5 Administration Guide', the title 'Sugar Ultimate 6.5 Administration Guide', a description, a 'Topics' section with 'Introduction' highlighted, and the start of the 'Introduction' text: 'Welcome to Sugar - a commercial, open source Customer Relationship Management (CRM) application. Strong relationships are at the core of every'.

Please note that all users can view the online documentation as well by clicking the Support link under the user menu on the upper right of Sugar. Doing so will open the SugarCRM Support page in a separate tab, and users can click the DOCUMENTATION tab on the navigation bar to view the appropriate guides. Once the main documentation page opens, simply select the version and edition specific to your Sugar instance. The guides (e.g. User Guides, Administrator Guides, etc.) specific to the selected version and edition of Sugar will now display on the page. Additional guides (e.g. SugarCRM Mobile for iOS User Guide, MS Outlook Plug-in User Guide 1.x, etc.) are available to view as well to the right of the page. Please note that you can also access documentation outside of your Sugar instance simply by navigating to the SugarCRM Support page (<http://support.sugarcrm.com>) and clicking the DOCUMENTATION tab.

SugarCRM Support » Documentation

Version 7.7 7.6 7.5 6.7 6.5 Edition Ultimate Enterprise Corporate Professional Community

6.5 Ultimate Documentation

User Guides

[Application Guide](#)

[Offline Client Guide](#)

[Portal Deployment User Guide](#)

[Portal User Guide](#)

Administrator Guides

[Administration Guide](#)

[Installation and Upgrade Guide](#)

[Supported Platforms](#)

Additional Guides

[Sugar Mobile Plus Guides](#)

[Sugar Mobile for iPhone User Guide](#)

[Sugar Mobile for Android User Guide](#)

[MS Outlook Plug-in User Guide 1.x](#)

[MS Excel Plug-in User Guide](#)

[MS Excel Plug-in Installation Guide](#)

[MS Word Plug-in User Guide](#)

[MS Word Plug-in Installation Guide](#)

[IBM Notes Plug-in User Guide 1.x](#)

[Accessibility](#)

[On-Demand Policy Guide](#)

Developer Guides

[Developer Guide 6.5](#)

[Schema 6.5.23](#)

[Schema 6.5.22](#)

Release Notes

[Release Notes 6.5.23](#)

[Release Notes 6.5.22](#)

[Release Notes 6.5.21](#)

The Application and Administration Guides provide end-users and administrators with an in-depth look at configuring, customizing, and utilizing Sugar, as well as the various options available in the application. The Installation and Upgrade Guide provide users with the necessary instructions to properly install or upgrade their On-Site Sugar instance. The Supported Platforms page covers the supported components that are necessary to run the Sugar application. The Developer Guides provide developers with advanced information on configuring and customizing Sugar to best meet their organization's needs. The release notes cover feature enhancements, fixed issues, etc. that are included in the specific version release. Additional guides include instructions for using mobile applications as well as plug-ins for Microsoft Office and IBM Notes.

Last Modified: 05/31/2016 02:52pm

System

Overview

Sugar comes with the ability to configure many different system settings to personalize the way Sugar works. The System section is only available to administrative users and can be accessed via the Admin screen. The following sections are available options from the System section.

System contains the following menus:

System Settings	Configure system-wide settings
Locale	Set default localization settings for your system
Currencies	Set up currencies and conversion rates
Languages	Manage which languages are available for users
Search	Select modules for the Global Search and configure full-text searching
Connectors	Manage connector settings
Themes	Choose themes for users to be able to select
Activity Streams	Enable the user feed and module feeds for the My Activity Stream dashlet
OAuth Keys	OAuth key management
Import Wizard	Import records easily into the system
Upgrade Wizard	Upload and install Sugar upgrades
Backups	Backup Sugar files
Repair	Check and repair Sugar
Diagnostic Tool	Capture system configuration for diagnostics and analysis
Tracker	Enable/Disable tracking
Scheduler	Set up scheduled events
PDF	Manage settings for generated PDF files
Mobile	Select modules to appear in the Mobile applications

System Settings

System Settings allows administrators to configure system-wide settings to your organization's specifications. The system settings are split across a few different panes of related information. Change the values in any of the panels and click "Save" to preserve your changes.

System Settings

Save Restore Cancel

User Interface

Listview items per page:

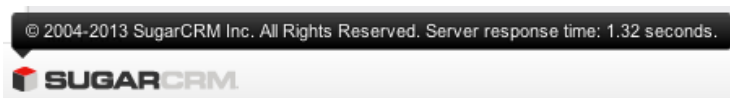
Prevent user customizable Homepage layout:

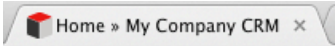
Alternatively you can click "Restore" to restore the system settings back to default.

User Interface

The User Interface pane consists of a group of settings that affect the interface of Sugar. Use the following settings to configure the different aspects of the interface:

- **Listview items per page:** The maximum number of records to display on a page in the list view. The system paginates lists that contain more than the specified number of records. Defaults to 20.
Note: Setting this option too high can cause performance issues.
- **Prevent user customizable Homepage layout:** Select this box to prevent users from adding and moving Sugar Dashlets on the Home page.
- **Maximum number of Sugar Dashlets on Homepage:** The maximum number of Sugar Dashlets to display on each tab of the Home page. Users will not be able to add more than the number of Sugar Dashlets specified. Defaults to 15.
- **Display server response times:** When hovering over the logo located in the footer on every page, a statistic displays the time taken to respond when users attempt to perform an action, such as logging in or opening an item, in Sugar. Deselect this option if you do not want to display the response time. Defaults to Enabled.



- **System Name:** The name of this instance of Sugar. Displays in the browser's title bar.
A screenshot of a browser title bar showing the text "Home » My Company CRM" followed by a close button (X).
- **Current Logo:** The current logo being used in the bottom left hand corner of the footer bar.
- **Select Logo:** Click "Choose File" to navigate to and select a new logo for your system. The dimension should be 212 X 40 pixels, with the standard transparent background color, in PNG or JPG format.
- **Lead Conversion Options:** Select an option from the dropdown for how to handle activity records on a Lead during the conversion process:
Copy: Creates and relates copies of all of the Lead's activities to new records

that are selected by the user during conversion. Copies are created for each of the selected records.

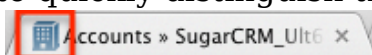
Move: Moves all of the Lead's activities to a new record that is selected by the user during conversion.

Do Nothing: Does nothing with the Lead's activities during conversion. The activities remain related to the Lead only.

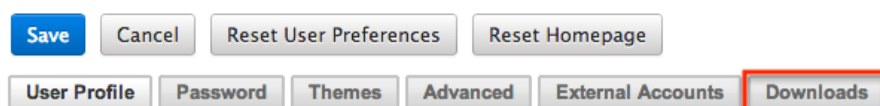
- **Disable convert lead action for converted leads :** If a lead has already been converted, enabling this option will remove the convert lead action.
- **Display actions within menus:** Select to display detail view and subpanel actions within a dropdown menu. If disabled, the actions will display as separate buttons.
- **Subpanel items per page:** The maximum number of records to display on a page in subpanels. The system paginates lists that contain more than the specified number of records. Defaults to 10.

Note: Setting this option too high can cause performance issues.

- **Prevent user customizable subpanel layout:** Select this option to prevent users from dragging and dropping subpanels to a different location in the detail view layout.
- **Show Full Names:** Select this option to set the default value for new users to display the full name of users instead of login names throughout Sugar.
- **Display module icon as favicon:** Select this option to display the module icon in the browser's navigation tab instead of the default Sugar icon. For example, when you are in the Accounts module, the navigation tab will display the Accounts icon. This assists users that commonly have multiple tabs open to quickly distinguish the contents of each tab.

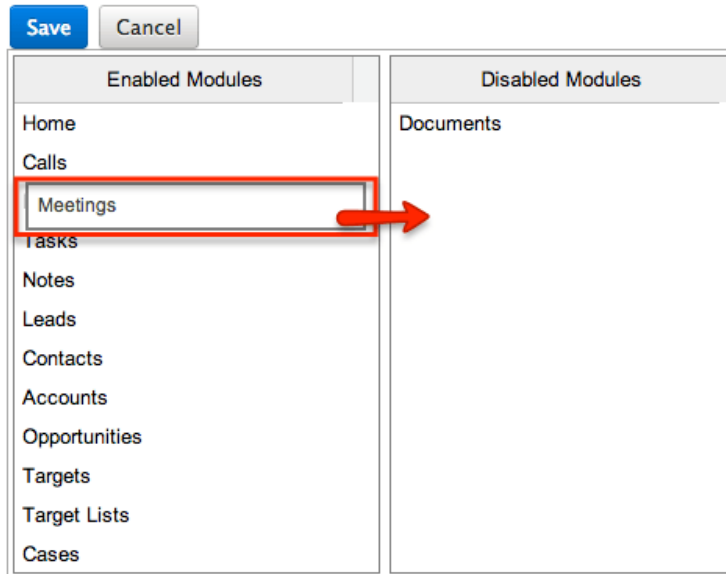


- **Minimum Dashlet Auto-Refresh Interval:** Select the minimum amount of time to allow auto refresh of dashlets. Users will be able to see and set values greater than the selected value for the dashlets on their homepage. Select "Never" to disable the ability to auto refresh dashlets.
- **Display Downloads Tab:** Select this option to display the Download tab in the User settings and provide users with access to Sugar plug-ins and other available files



- **Configure AJAX User Interface:** Select this link to configure which modules will utilize AJAX and which ones will not. AJAX UI can increase performance with reduced page rendering times; however, some third party modules and customizations do not work with the AJAX UI.

Simply drag a module from the Enabled Modules pane to the Disabled Modules pane, or vice versa, and click "Save".



Note: Documents is disabled by default. The Admin module is not AJAX enabled so administrators can access the admin page to disable the AJAX UI when necessary.

Proxy Settings

Proxy servers redirect Internet traffic coming from and to the server running Sugar. If you are using a proxy server, you will need to enter proxy information into the system settings to allow the Sugar instance to communicate with the internet. This is necessary to allow the system licensing to validate and update. For more information on system licenses, please refer to the [License Management](#) section of the Sugar Connect documentation in the administration guide.

Note: Proxy settings should not be used for instances of Sugar hosted On-Demand.

Use the following settings to configure proxy settings:

- Use Proxy Server?: Select this option to use a proxy server and to reveal the following fields.
- Proxy Host : The host name or ip address of the proxy server to use.
- Port: The communication port of the proxy server.
- Authentication?: Select this option if the proxy server requires authentication and to reveal the following fields.
- User Name: The user name to authenticate to the proxy server.
- Password: The password to authenticate to the proxy server.

Proxy Settings
Use proxy server?
Proxy Host* myproxy.mysite.com Port* 8080
Authentication?
User Name* myusername Password*

SkypeOut

SkypeOut takes any stock or custom field that has a type of Phone and makes it a link that launches Skype to call the phone number. The phone number must be formatted properly to use this feature. It must be "+" "The Country Code" "The Number" (e.g. +1 (555) 555-1234). Select "Enable SkypeOut integration" to enable this feature.

SkypeOut®
Enable SkypeOut® integration

Mail Merge

Mail Merge allows users to combine records in Sugar with a template to print off correspondence or marketing messages. The mail merge feature in Sugar relies on the Sugar plug-in for Microsoft Word and when enabled allows a mail merge to be performed for the Accounts, Cases, Contacts, Leads, and Opportunities modules. Select "Enable mail merge?" to enable this feature.

Mail Merge
Enable mail merge?

For more information on how to perform a mail merge, please refer to the [Mail Merge](#) documentation in the Application guide.

Note: There is also an option to disable Mail Merge for a specific user in the Advanced tab of the User Preferences page.

Advanced

The Advanced panel consists of the following group of settings for advanced configuration of Sugar:

- Log slow queries: Select this option to log queries that take longer than the slow query time threshold. This is useful for performance debugging.

Note: There is an inherent overhead to logging slow queries. If the threshold is set too low, it may cause performance issues.

- **Maximum upload size:** Specifies the maximum file size in bytes that is allowed to be uploaded to Sugar. This setting affects images, import files, attachments, and module uploads.

Note: The file upload size is also dependent on the php.ini `upload_max_filesize` and `post_max_size` directives.

- **vCal Updates Time Period:** Determines the number of months the Free/Busy data is published to vCal. Specify the number of months in advance of the current date that Free/Busy information for calls and meetings to be published. To turn Free/Busy publishing off, enter "0". The maximum is 12 months.
- **Log memory usage:** Select this option to log memory usage per action performed in Sugar. The data will be stored in the `./memory_usage.log` file.
- **Slow query time threshold (msec):** Specify a threshold in milliseconds to begin logging slow queries at. If "Log slow queries" is selected, queries that take longer than the threshold to process will be logged. If you have enabled the Tracker Queries option on the [Tracker](#) page, you can run the pre-defined Slow Queries report to view slow queries.
- **Display stack trace of errors:** Select this option to display where errors occur in the application's stack trace. This option is for debugging purposes and should not be left on in a production instance.
- **Developer Mode:** Select this option to disable caching to immediately view changes made to language, vardefs, and template files. This option is for debugging purposes and should not be left on in a production instance.
- **Import - Maximum Number of Rows:** Specify how many rows are allowed within import files. If the number of rows in an import file exceeds this number, the user will be alerted. If no number or zero is entered, an unlimited number of rows are allowed.

Note: Header rows count towards the total number of rows in the import file.
Logger Settings

Sugar comes with a built-in logging system to log information or errors that occur in the application. By default, the logs are written to `sugarcrm.log` in the Sugar root directory. If a problem arises, you can refer to the log file for information that may help in troubleshooting the issue. The Logger Settings panel consists of a group of settings that affect the Sugar logs.

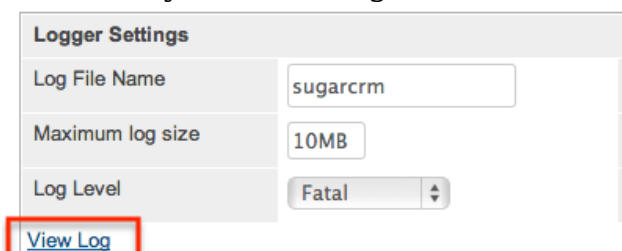
Note: The Logger Settings panel is hidden for on-demand instances of Sugar. Should you require a log level to be temporarily changed on an on-demand production environment, you must open a [support case](#). For more information about default configuration settings for on-demand environments, please refer to the [On-Demand Policy Guide](#).

Use the following settings to configure the different aspects of Sugar logging:

-
- Log File Name : Specify a name for the log file. Defaults to sugarcrm.
 - Maximum log size : Specify the maximum size of the log file in megabytes (MB). The default is 10MB. Once a log file reaches the specified size it is renamed to have an incrementing number and a new file will be created to contain new logs.
 - Log Level : Select the event level that you want to capture in the log file. The levels are listed below in order of the most log records to the least. The default level is fatal. When specifying a logging level, the system will create log files for the specified level as well as higher levels. For example, if you select "error", the system creates log files for "error", "fatal", and "security". Please note that there is an inherent overhead to logging. If the log level is set too high, it may cause performance issues. The "info" and "debug" settings are not recommended for continuous use in a production environment.
 - debug : Logs events that help debug the application
 - info : Logs informational messages
 - warn : Logs potentially harmful events
 - error : Logs error events in the application
 - fatal : Logs severe error events that cause the application to abort
 - security : Logs events that may compromise the security of the application
 - off : The logger will not log any events
 - Extension : Specify the file extension for the log file. Defaults to .log.
 - Default date format : The date format for the log file. This format must be supported by [strftime](#). Defaults to %c.
 - Maximum number of logs (before rolling) : The maximum number of log files to save. When the number of log files exceed this limit, Sugar deletes the log file that was created first. Defaults to 10.
 - Append after filename : Select a time period from the dropdown list to append to the file name (None, Month_Year, Day_Month, Month_Day_Year). This makes it easier to identify the log that you want to view.

View Log

The Sugar log is stored in the root directory of Sugar and is accessible from the operating system. Administrators who do not have access to the operating system running Sugar do have the ability to view the log through Sugar. Select "View Log" from the System Settings screen.



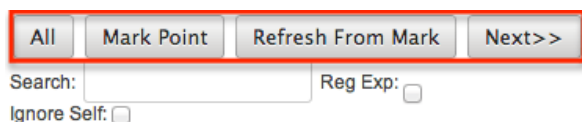
The screenshot shows a 'Logger Settings' window with the following fields and values:

Field	Value
Log File Name	sugarcrm
Maximum log size	10MB
Log Level	Fatal

A 'View Log' button is located at the bottom left of the settings window and is highlighted with a red box.

This opens the log viewer for the current log file. You have the following options for navigating the log file:

- All: Select this option to view the entire log.
- Mark Point: Select this option to mark a starting point in the current log file.
- Refresh From Mark: Select this option to view any entries made in the log after the most recent mark.
- Next: Select this option to view new entries in the current log file.



A common method for utilizing these options to debug a problem would be to click "Mark Point", perform the action causing problems, and then select "Refresh From Mark" to see any log entries caused by the action being debugged.

You also have the ability to search within the log file for keywords. To perform a search, simply enter a keyword into the search box and press Enter on your keyboard to execute the search.

Locale

Locale allows administrators to configure localization settings to your organization's specifications. Some of the settings specified here can be overridden by user level personalizations such as datetime format on the User Preferences page. The locale settings are split across a few different panels of related information. Change the values in in any of the panels and click "Save" to preserve your changes.

Locale

A screenshot of the "User Interface" panel in the Locale settings. At the top, there are two buttons: "Save" (highlighted with a red box) and "Cancel". Below the buttons is a table with three rows of settings:

User Interface	
Date Format:	12/23/2010
Language:	English (US)
Name Format:	Dr. David Livingstone

User Interface

The User Interface panel consists of a group of locale settings that affect the interface of Sugar. Use the following settings to configure the different aspects of the interface:

-
- **Date Format:** Select a format from the dropdown for displaying the date throughout the application.
 - **Language:** Select a default language from the dropdown for use throughout the application. Users can select a different language from the login page. For more information regarding enabling or disabling languages, please refer to the [Languages](#) section.
 - **Name Format:** Select a format from the dropdown for displaying people names throughout the application. You can specify any combination of salutation, first name, and last name.
 - **Time Format:** Select a format from the dropdown for displaying the time throughout the application.

Users have the ability to override the default date, time, and name formats through their user profiles. For more information on how to set locale settings per user, please refer to the [Locale Settings](#) section of the Getting Started documentation in the Application guide.

System Currency

The System Currency panel consists of a group of currency settings that affect the interface of Sugar. Use the following settings to configure the different currency options:

- **Currency:** The name of the default currency your organization uses to conduct business.
- **ISO 4217 Currency Code:** The ISO code for the currency.
- **Decimal Symbol:** The default decimal symbol.
- **Currency Symbol:** The default symbol for the currency.
- **1000s Separator:** The default delimiter to separate thousands.

Users have the ability to override the currency defaults through their user profiles. For more information on how to set currency settings per user, please refer to the

Export Settings

The Export Settings panel consists of a group of export settings that affect different aspects of exporting in Sugar. Use the following settings to configure the different export options:

- **Export Delimiter:** The delimiter used to separate fields while exporting data. Defaults to a comma.

- **Disable export:** Select this option to disable the export option for all users, including administrators.
- **Default Character Set for Import and Export:** Select a default character set from the dropdown that handles the expected characters in an import and export. Defaults to UTF-8.
- **Admin export only:** Select this option to disable the export option for standard users, administrators will be allowed to export.

Users have the ability to override the default export delimiter and character set through their user profiles. For more information on how to set export settings per user, please refer to the [User Settings](#) section of the Getting Started documentation in the Application guide.

Note: Locales that use character encoding other than UTF-8 must specify the appropriate character set.

Database Collation

The Database Collation panel only shows if running on a MySQL database and contains an option to change the collation of the connection Sugar makes to the database. Select the desired collation from the dropdown. Defaults to `utf8_general_ci`.



Note: Changing this setting will not change existing tables, but only new tables going forward. If this setting does not match the collation of the current tables in the database then the database will return errors when accessing those tables.

Currencies

Currencies allows administrators to configure all currencies and exchange rates in Sugar.

The defined currencies are displayed in a table at the top of the page and a form is displayed at the bottom for creating a new currency. From the table you can select the currency's name to modify the details of the currency, or you can select "delete" to remove the currency.

Currencies

Currency Name	ISO 4217 Code	Currency Symbol	Conversion Rate	Status	
US Dollars	USD	\$	1.0000000000	Active	
CA Dollars	CAD	\$	1.0089000000	Active	 delete
Euro	EUR	€	0.7571200000	Active	 delete

The system currency is displayed here but is not editable. For more information on how to edit the system currency, please refer to the [System Currency](#) section.

When selecting a currency, the form underneath the table is populated with the

selected currency's data. Modify the following fields and click "Save" to preserve your changes:

- **Currency Name:** The name or designation of the currency.
- **Conversion Rate:** The conversion rate to get to this currency from the system currency. In our example above, to get Canadian Dollars, you would have to multiply US Dollars by 1.0089. This value is the conversion rate.
- **Status:** The current status of the currency (e.g. Active, Inactive). Selecting "Inactive" will remove this currency from the dropdowns throughout the application.
- **ISO 4217 Code:** The ISO code for the currency.
- **Currency Symbol:** The default symbol for the currency.

Edit » CA Dollars

Currency Name: *	<input type="text" value="CA Dollars"/>	ISO 4217 Code: <small>i</small>	<input type="text" value="CAD"/>
Conversion Rate: *	<input type="text" value="1.0089000000"/> <small>i</small>	Currency Symbol: *	<input type="text" value="\$"/>
Status:	<input type="button" value="Active"/> ▾		

To create a new currency in the system, simply populate the Create form with the details of the new currency and click "Save".

Create

Currency Name: *	<input type="text"/>	ISO 4217 Code: <small>i</small>	<input type="text"/>
Conversion Rate: *	<input type="text" value="0"/> <small>i</small>	Currency Symbol: *	<input type="text"/>
Status:	<input type="button" value="Active"/> ▾		

Note: When creating a new currency, you can populate the ISO 4217 Code and the Currency Name and Currency Symbol will automatically populate based on the code entered.

Languages

Languages allows administrators to configure which languages are available for users to login with. To disable a language, simply drag the language from the Enabled Languages panel to the Disabled Languages panel and click "Save".

Languages

Drag and Drop the names of the languages below to enable and disable them.

Enabled Languages	Disabled Languages
English (US)	
Български	
Česky	
Dansk	
Deutsch	
Ελληνικά	
<input type="text" value="Español"/>	
Français	
עברית	
Magyar	
Italiano	
Lietuvių	

Any languages in the Disabled Languages section will not be in the Languages dropdown while logging in.

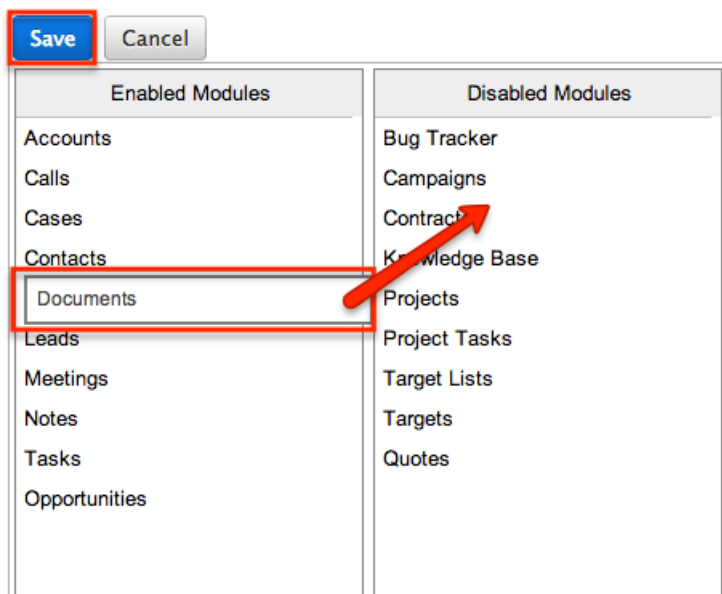
Search

Search allows administrators to configure search settings like enabling the global search for specific modules or configuring full text search.

Enabling Modules for Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. For more information on how to use global search, please refer to the [Global Search](#) section of the Search documentation in the Application guide.

To enable or disable a stock or custom module for global search, simply drag the module to the Enabled Modules or Disabled Modules panel and click "Save".



Any modules in the Disabled Modules section will not be included in the global search results. When enabling modules and full text searching is enabled, you will need to perform a system index before the module will appear in the search results.

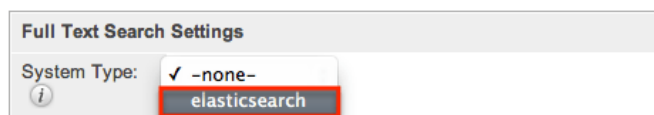
Note: Global Search, on Sugar installations running on Oracle, is case-sensitive by default. To change this, add the following line to the `config_override.php` file:

```
$sugar_config['oracle_enable_ci'] = true;
```

Activating Full Text Search

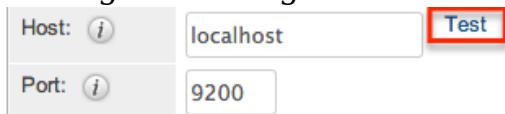
Beginning with version 6.5.0 of Sugar, global search can be enabled with full text searching abilities utilizing the elasticsearch engine. Full text search (FTS) allows users to search throughout all fields and modules for an enhanced search experience. Full text search is enabled by default for most On-Demand instances. Use the following steps to enable full text search from the Search page in Admin:

1. Select an option from the System Type dropdown to use for full text search. Currently elasticsearch is the only supported search engine. For more information on elasticsearch, please see <http://www.elasticsearch.org/>.



2. Enter in the Host the search engine is running on. Defaults to localhost assuming you are running the search engine on the same server as Sugar.
3. Enter in the Port number for Sugar to connect to the search engine. Defaults to 9200, which is elasticsearch's default.

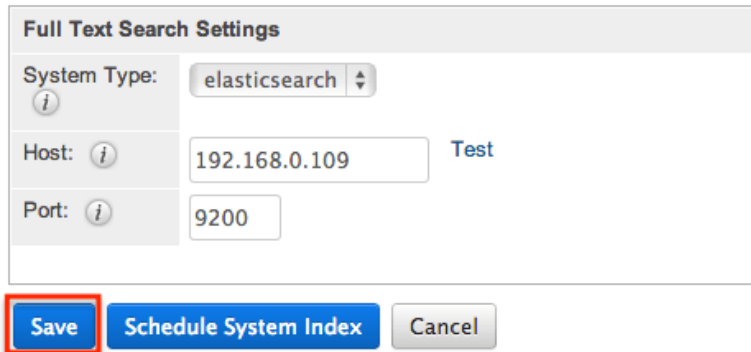
-
- Click "Test" to verify the settings entered and to ensure the search engine is running and configured correctly.



Host:

Port:

- A popup message will inform you if the connection was successful or not.
- If the connection was successful, click "Save" to preserve your changes.



Full Text Search Settings

System Type:

Host:

Port:

Note: After activating full text search the first time, you must perform a system index before records can be returned in the search results. For more information on performing a system index, please refer to the [Indexing Full Text Search](#) section below.

Each enabled module has a set of fields that are enabled for full text searching by default. Administrators can enable or disable specific fields for full text search through Admin > Studio. For more information on how to enable or disable fields for full text search through Studio, please refer to the [Studio](#) documentation in the Administration guide.

Note: Once a new module or field is added to full text search, you must perform a system index before that item will be included in the full text results.

Indexing Full Text Search

Full text search relies on an index of the records and data to be able to quickly locate results. After enabling full text search, or enabling a module or field, you should perform a full index of your system.

Note: System performance can be affected while you are running an index. It is recommended to run an index during low usage or off hours.

Use the following steps to perform a full system index:

- Click "Schedule System Index".

2. A pop-up message will display warning of potential performance issues during the index. Click "Ok" to proceed.
3. Select one or more modules to perform the index on. You may also select "All" to index all full text search enabled modules.

4. Select the checkbox to delete the current index data before the index operation runs. If this is the first index being ran on the system, you do not need to select this option. If you have added fields to a module's index, then this checkbox should be selected or the new field may not show in the results.
5. Select "Index" to schedule the index.
6. The next time the scheduler runs, it will rebuild the index based on the selected options. For more information about the schedulers, please refer to the [Schedulers](#) documentation in the Administration guide.

Note: The time and resources it takes to perform a index is directly proportional to the number of modules selected for the indexing. It is recommended that you choose only the modules that require indexing and perform the index during low usage or off hours.

Connectors

Connectors allows administrators to configure the different external data sources that integrate with Sugar. Sugar provides connectors to LinkedIn, Hoover's, Zoominfo -Person, Zoominfo -Company, Twitter, Facebook, Google Docs (Google Drive), Citrix GoToMeetings, IBM SmartCloud, Cisco WebEx meetings, and InsideView. Connectors are enabled by default to allow users to search external data sources for new information from within a Sugar record in the module. Users can view the external data and in some case merge it with the existing information in the Sugar record. For more information on how to merge data from a connector, please refer to the [Get Data](#) section of the User Interface documentation in the Application guide.

Connectors can be disabled and configured via the Set Connector Properties, Enable Connectors, Map Connector Fields, and Manage Connector Search sections. Developers in your organization can create connectors to other data sources, and you can upload them into Sugar using the Module Loader. You can also search for other available Connectors on Sugar Forge at <http://www.sugarforge.org> and Sugar Exchange at <http://www.sugarexchange.com>.

Setting Connector Properties

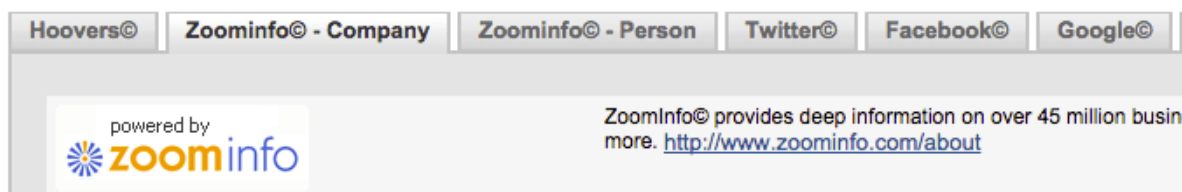
Many connectors use web services and require certain connector properties (e.g. API Key, Consumer Key, etc.) to be configured prior to use. To configure the connector properties, simply click the Set Connector Properties button on the Connector Settings page.



Set Connector Properties
Configure the properties for each connector, including URLs and API keys.

The Set Connector Properties page displays a tab for each connector that must be configured in order to use in Sugar. Many of the tabs (e.g. Twitter) will include the necessary steps or link for you to obtain the information (e.g. API Key, Consumer Key, etc.) needed to set up the connector. Once the necessary information has been entered, click "Save" to preserve your settings.

[Connector Settings](#) » [Set Connector Properties](#)



The following connectors and their properties are available to configure:

Connector	Property	Description
Hoovers	Endpoint URL	URL that services SOAP calls. Default is http://dnbdirect-sandbox.dnb.com/DnBAPI-10
	WSDL URL	WSDL URL for SOAP calls. Default is http://dnbdirect-sandbox.dnb.com/DnBAPI-10/dnbAPI/dnbAPI.wsdl
	API Key	The API key provided by Hoovers
Zoominfo - Company	Company Search URL	URL that services SOAP calls for Company Name queries. Default is http://partners.zoominfo.com/PartnerAPI/XmlOutput.aspx?query_type=company_search_query&pc=
	Company Detail URL	URL that services SOAP calls for Company details. Default is http://partners.zoominfo.com/PartnerAPI/XmlOutput.aspx?query_type=company_detail&pc=
	Partner API Code	The partner code provided by Zoominfo
	API KEY	The API key provided by Zoominfo
Zoominfo - Person	Person Search Query URL	URL that services SOAP calls for Person Name queries. Default is http://partners.zoominfo.com/PartnerAPI/XmlOutput.aspx?query_type=people_search_query&pc=
	Person Detail Query URL	URL that services SOAP calls for Person details. Default is http://partners.zoominfo.com/PartnerAPI/XmlOutput.aspx?query_type=person_detail_query&pc=

		aspx?query_type=person_detail&pc=
	Partner API Code	The partner code provided by Zoominfo
	API Key	The API key provided by Zoominfo
Twitter	Consumer Key	The Consumer Key provided by Twitter
	Consumer Secret	The Consumer Secret provided by Twitter
Facebook	API Key	The API Key provided by Facebook
	App Secret	The App Secret provided by Facebook
Google	Client ID	The Client ID provided by Google
	Client Secret	The Client secret provided by Google
GoToMeeting	API Key	The API Key provided by GoToMeeting
IBM SmartCloud	OAuth Consumer Key	The OAuth Consumer Key provided by IBM
	OAuth Consumer Secret	The OAuth Consumer Secret provided by IBM

For certain tabs (e.g. Hoovers, Zoominfo, etc.), the Test Connector button is available below the connector properties to confirm that the data source is configured correctly. Please note that Hoovers and Zoominfo have demo keys entered by default, but they are not visible from the properties page. If you are planning on using Hoovers or Zoominfo, please register to obtain the proper keys. WebEx and InsideView do not have global properties that need to be configured, so they will not appear on the Set Connector Properties page.

Enabling Connectors

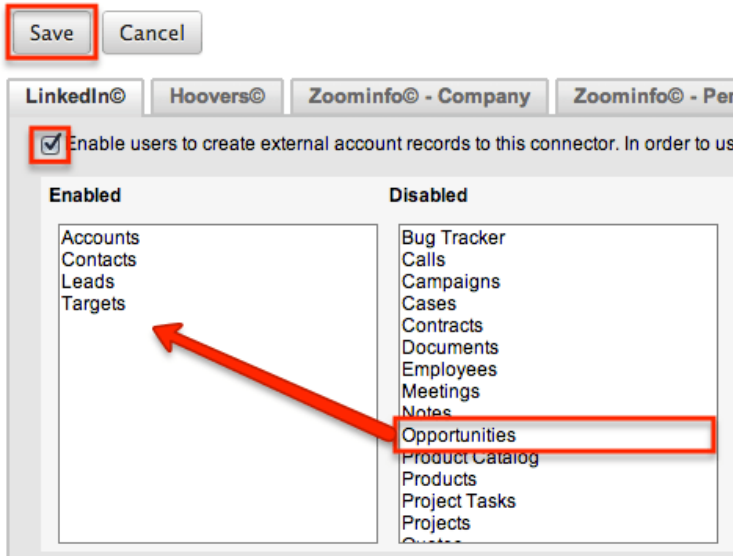
In order to utilize connectors in Sugar, administrators have to have them enabled. Certain connectors can be enabled for the entire application and some can be enabled for specific modules. To access the enable connectors screen, simply click on the icon next to "Enable Connectors".



Enable Connectors
Select which modules are enabled for each connector.

The Enable Connectors page has a tab for every connector. To enable a connector, click the checkbox towards the top of the page. If the connector can be enabled for specific modules, drag the desired module from the Disabled panel to the Enabled panel. Click "Save" to preserve your changes.

[Connector Settings](#) » [Enable Connectors](#)



Only modules with a standard detail view layout can have connectors enabled for it. For example, Knowledge Base module does not have a standard detail view; therefore, it does not show up as an available module to enable.

Note: InsideView is only available for the Accounts, Opportunities, Leads, and Contacts modules.

Mapping Connector Fields

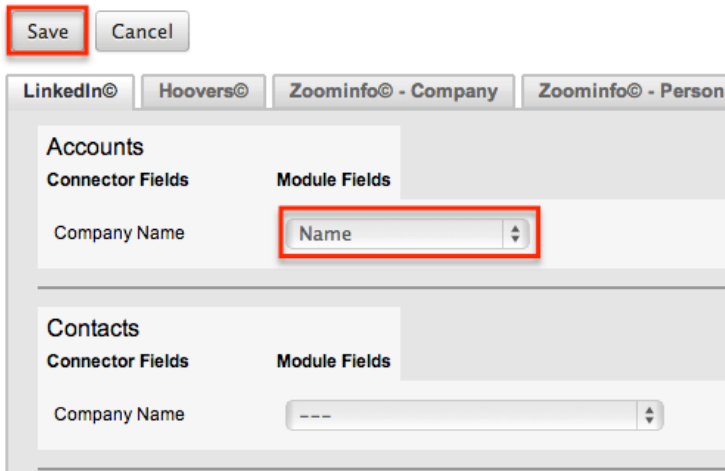
Some connectors query external services based on fields in Sugar. These mappings can be customized to use different fields based on your organizations needs. To access the field mapping screen, simply click on the icon next to "Map Connector Fields".



Map Connector Fields
Map connector fields to module fields in order to determine what connector data can be viewed and merged into the module records.

The Map Connector Fields page has a tab for every connector that has field mapping available. For every mappable field for the connector, select a field in Sugar to map. If the connector is enabled for multiple modules, be sure to select the proper fields for each module. Make any adjustment to the mapping as necessary and click "Save" to preserve your changes.

Connector Settings » Map Connector Fields



Many fields in the connectors will not match up with a stock field in Sugar. If you wish to capture and map certain fields from the connector, you will have to create fields through Admin > Studio. For more information on how to create fields through Studio, please refer to the [Studio](#) documentation in the Administration guide.

The following are the fields that are available from the default connector mappings:

Connector	Fields	
LinkedIn	Company Name	
Hoovers	Company Name	Postal Code
	Street Address1	Annual Sales
	Street Address2	Total Employees
	City	Phone Office
	State	Description
	Country	Synopsis
Zoominfo - Company	Company Name	Website
	Street	Description
	City	Annual Revenue
	State	Phone
	Postal Code	Employees
	Country	Company Ticker
	Industry	Company Profile URL
Zoominfo - Person	First Name	Image URL
	Last Name	Zoominfo Person URL

	Current Job Title	Direct Phone
	Current Job Company Name	Fax
	Company Phone	Current Job Start Date
	Current Job Street Address	Current Job Industry
	Current Job City Address	College/University
	Current Job State Address	Affiliation Job Title
	Current Job Zip Address	Affiliation Company Name
	Current Job Country Code	Affiliation Company Phone
	Biography	Affiliation Company Website
	Email Address	
Twitter	Twitter User name	

Field mappings for LinkedIn and Twitter are used only for looking up the information from that field in Sugar, where Hoovers and Zoominfo are used for lookups and for merging data. If a field in the connector is not mapped to a Sugar field, it will not be able to be included in a data merge from the connector. For more information on how to merge data from a connector, please refer to the section of the User Interface documentation in the Application Guide. LinkedIn and Twitter will look up matches based on the fields selected. It is recommended to create a separate field to hold the exact Twitter handle to match up Twitter accounts as mapping on a name will not always make a match. For more information on how to use the LinkedIn and Twitter connectors, please refer to the [External Data Connectors](#) section in the User Interface documentation in the Application guide.

Managing Connector Search

Some connectors that have multiple fields for mapping need to have specified which of these fields are for searching data on, where the rest are solely for merging into Sugar. To access the connector search screen, simply click on the icon next to "Manage Connector Search".

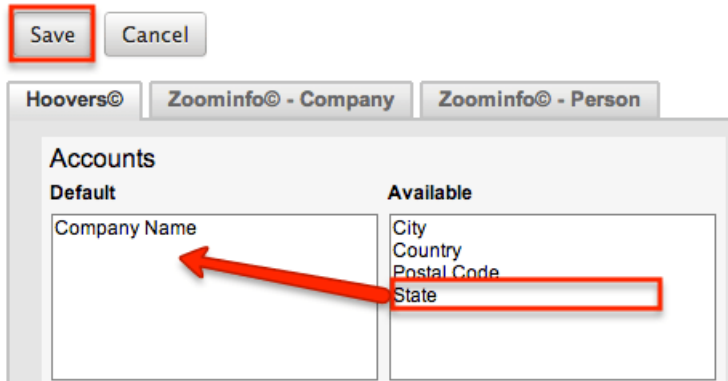


Manage Connector Search
Select the connector fields to use to search for data for each module.

The Manage Connector Search page has a tab for every connector that needs search fields defined. The search fields are limited to the input parameters of the connector being used. Drag any desired fields to search on from the Available panel to the Default panel. Make any adjustment to the search fields as necessary

and click "Save" to preserve your changes.

[Connector Settings](#) » [Manage Connector Search](#)



The following is a list of each connector's default (followed by an asterisk) and available fields to search on:

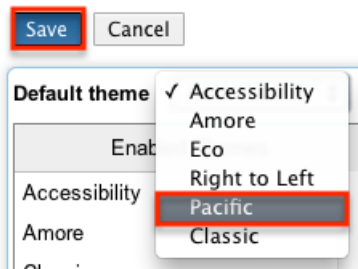
Connector	Field
Hoovers	Company Name*
	City
	Country
	Postal Code
	State
Zoominfo - Company	Company Name*
	State*
	Country*
	Postal Code
Zoominfo - Person	First Name*
	Last Name*
	Email Address*
	Current Job Company Name*
	College/University

Themes

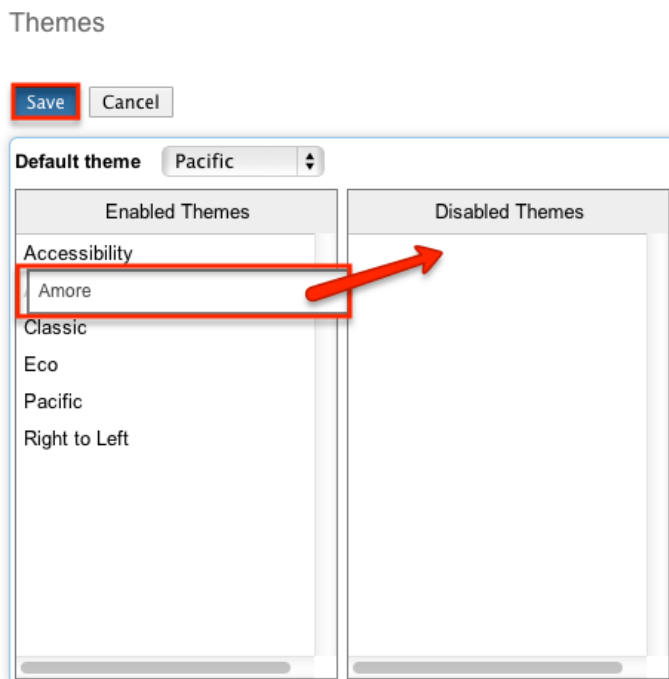
Themes allows administrators to determine the default theme for the application as well as which themes are available and which are disabled.

To change the default theme all users will use when first logging in, select a theme from the Default theme dropdown and click "Save".

Themes



Users can change the theme for their login from their profile. For more information on how to change the theme for a single login, please refer to the [Themes Tab](#) section of the Getting Started documentation in the application guide. Users can only change their theme to an approved theme and by default all themes in the system are approved. Administrators can disable themes by dragging the theme from the Enabled Themes panel to the Disabled Themes panel and clicking "Save".



Activity Streams

Activity Stream allows administrators to configure what activity stream options are available for users. The activity stream allows users to see information such as new records, lead conversions, case or opportunity closures, messages from other users, Twitter posts, and Facebook posts.

To disable the activity stream throughout the application, deselect the Enable My Activity Stream Dashlet checkbox and click "Save".

Activity Streams

Enable My Activity Stream Dashlet: *Note: To enable users to view Facebook*

Activate Feeds For:

Cases: Contacts:
Leads: Opportunities:

Activate User Feed:

When the activity stream is enabled, administrators can select which of the four activity stream enabled modules they would like users to be able to use. The following modules and activities will be logged in the activity stream when selected:

Module	Action
Cases	New Record
	Status changed to Closed
Leads	New Record
	Status changed to Converted
Contacts	New Record
Opportunities	New Record
	Sales Stage changed to Closed Won

Select the checkbox next to the modules you wish to show in the activity stream and click "Save" to preserve your changes.

Activity Streams

Enable My Activity Stream Dashlet: *Note: To enable users to view Facebook*

Activate Feeds For:

Cases: Contacts:
Leads: Opportunities:

Activate User Feed:

In addition to system generated messages, you can enable the user feed to allow users to post status updates, external links, images, YouTube videos, and to reply to other activity streams. To disable the user feed, select the checkbox next to Activate User Feed and click "Save".

Activity Streams

Save Cancel Delete Feed Entries

Enable My Activity Stream Dashlet: *Note: To enable users to view Facebook*

Activate Feeds For:

Cases: Contacts:

Leads: Opportunities:

Activate User Feed:

Please note that users will only be able to see streams as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentations in the Administration guide.

Click "Delete Feed Entries" to mark all records in the activity stream as deleted.

Activity Streams

Save Cancel Delete Feed Entries

Enable My Activity Stream Dashlet: *Note: To enable users to view Facebook*

Activate Feeds For:

Cases: Contacts:

Leads: Opportunities:

Activate User Feed:

Note: To enable Twitter and Facebook posts to show in users' activity stream, the connector properties must be populated with valid keys and secrets. For more information on how to populate the connector properties, please refer to the [Setting Connector Properties](#) section in this documentation. The user will also have to add their Twitter or Facebook credentials as an External Account in their user profile. For more information on how to add an external account, please refer to the [External Accounts Tab](#) section of the Getting Started documentation in the Application guide.

OAuth Keys

OAuth is an open standard for authorization that enables users to share private resources stored on one site with another site without divulging personal credentials such as user name and password. OAuth works with a public consumer key and a private consumer key. Together, these keys identify which application connects to the service. It is the choice of the Sugar administrator to decide how many different keys to have and whom to give them to.

OAuth Fields

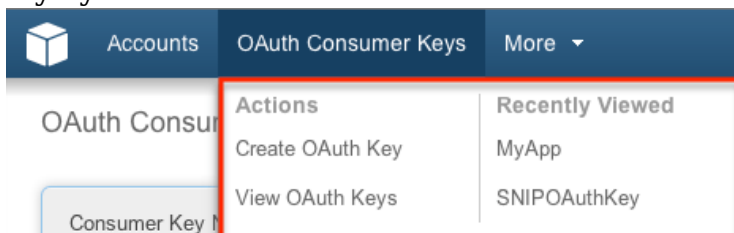
The OAuth module contains a number of stock fields which come out-of-the-box

with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.

Field	Description
Consumer Key Name	The name or designation of the OAuth Key.
Consumer Key	Public key. A user name is a suitable consumer key value.
Consumer Secret	Private key. A password is a suitable consumer secret value. Note: The private key is not sent when making a connection.
Description	A description or other information about the OAuth key.

OAuth Module Tab

The OAuth module tab is typically located on the navigation bar at the top of any Sugar screen after selecting "OAuth" from the admin screen. Click the tab to access the OAuth list view. You may also hover on the tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of OAuth keys you last viewed in the module.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Create OAuth Key	Opens the edit view layout to create a new OAuth Key
View OAuth Keys	Opens the list view layout to search and display OAuth Keys

Creating OAuth Keys

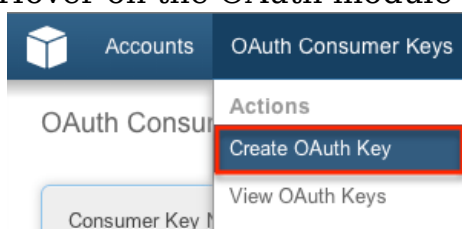
There are various methods for creating OAuth keys in Sugar including via the OAuth module and via duplication. The full edit view layout opens when creating

the OAuth keys directly from the OAuth menu and includes all of the relevant fields for your organization's OAuth keys. The quick create form is a shortened version of the OAuth edit view and typically contains fewer fields.

Creating Via OAuth Module

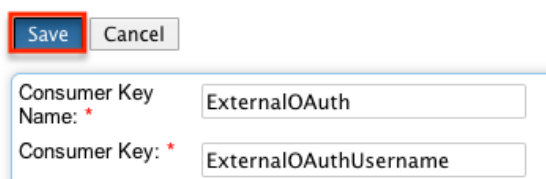
One of the most common methods of OAuth key creation is via the Create OAuth Key option in the OAuth module tab. This opens up the edit view layout which allows you to enter in all the relevant information for the OAuth key. Use the following steps to create a OAuth key via the OAuth module:

1. Hover on the OAuth module and select "Create OAuth Key".



2. Enter appropriate values for the [Fields](#) in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".

Create

A screenshot of a form for creating an OAuth key. At the top, there are two buttons: 'Save' and 'Cancel'. The 'Save' button is highlighted with a red rectangular box. Below the buttons, there are two input fields. The first field is labeled 'Consumer Key Name: *' and contains the text 'ExternalOAuth'. The second field is labeled 'Consumer Key: *' and contains the text 'ExternalOAuthUsername'. Both labels have a red asterisk indicating they are required fields.

Creating Via Duplication

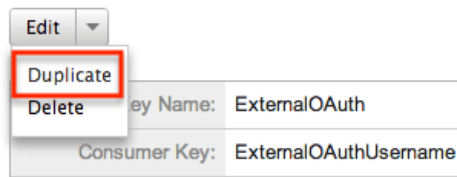
You can also create a new OAuth key by duplicating an existing record. The duplicate option is useful if the key you are creating has similar information to an existing OAuth key.

Note: The system generated OAuth Support Portal Key can not be duplicated.

Use the following steps to create a OAuth key by duplicating an existing record:

1. Navigate to an OAuth key record's detail view.
2. Select "Duplicate" from the Actions menu.

ExternalOAuth



ExternalOAuth

Edit ▼

Duplicate

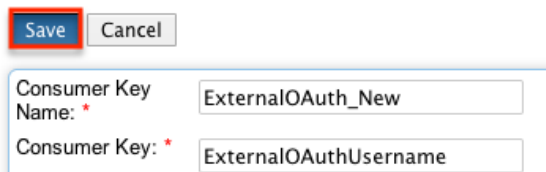
Delete

Key Name: ExternalOAuth

Consumer Key: ExternalOAuthUsername

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

Create



Save Cancel

Consumer Key Name: * ExternalOAuth_New

Consumer Key: * ExternalOAuthUsername

Viewing OAuth Keys

There are various options available for viewing OAuth key records in Sugar including via OAuth list view, OAuth detail view, and OAuth Recently Viewed menu.

Viewing Via List View

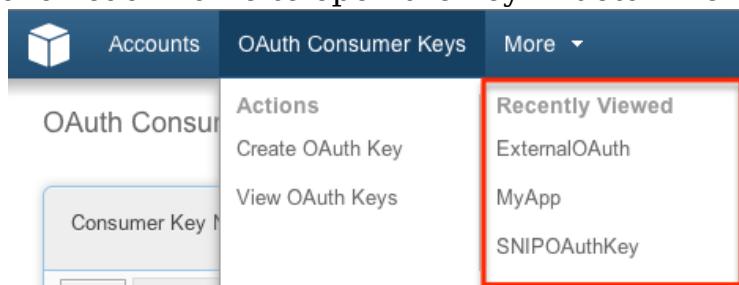
The OAuth list view displays all OAuth key records meeting the current search criteria. To access the list view, simply click the OAuth module tab. While list view shows key OAuth key fields, you can click the key's name to open the record in detail view. For more information on viewing OAuth keys via list view, please refer to the [OAuth List View](#) section.

Viewing Via Detail View

The OAuth detail view displays thorough OAuth key information including all key fields followed by subpanels of the key's related records belonging to various modules. The detail view can be reached by clicking a key record's link from anywhere in the application including from the OAuth list view. For more information on viewing OAuth keys via detail view, please refer to the [OAuth Detail View](#) section.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which OAuth keys you have recently viewed. Hover on the [OAuth Module Tab](#) to see a list of your most recently viewed keys and click each name to open the key in detail view.



Searching OAuth Keys

The OAuth list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the OAuth list view below. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the [Search](#) documentation.

Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.

The buttons and checkboxes available in Basic Search panel have the following functions:

- Search: Click the Search button or press your Return/Enter key to perform the search.
- Clear: Click the Clear button to clear all criteria from the searchable fields.

OAuth Consumer Keys

A screenshot of the search panel for 'OAuth Consumer Keys'. It features a text input field labeled 'Consumer Key Name'. To the right of the input field are two checkboxes: 'My Items' and 'My Favorites'. Further right are three buttons: 'Search', 'Clear', and 'Advanced Search' (with a help icon).

Consumer Key Name	<input type="text"/>	My Items <input type="checkbox"/>	My Favorites <input type="checkbox"/>	Search	Clear	Advanced Search
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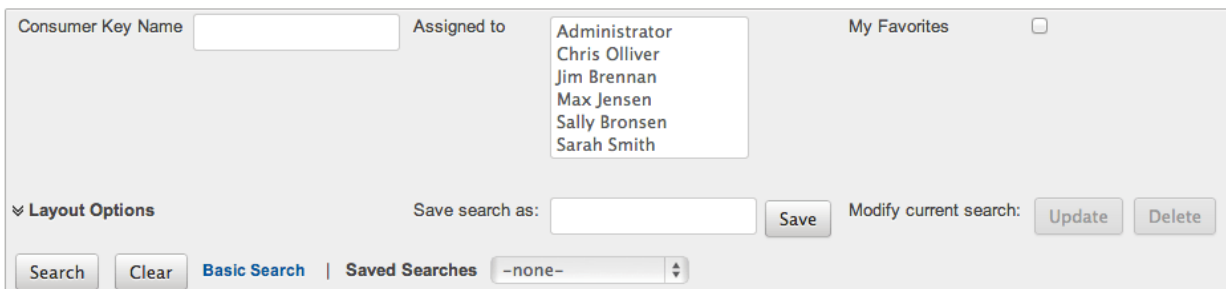
When you run a search, Sugar will return records matching all (as opposed to any)

of the fields and checkboxes for which you have given a value. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all OAuth key records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters.

Advanced Search

Advanced Search offers a more in-depth search experience than Basic Search including additional fields, layout options, and saved search capability. From the Advanced search panel, you can click "Basic Search" for simplified searching. The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

- **Search:** Click the Search button or press your Return/Enter key to perform the search.
- **Clear:** Click the Clear button to clear all criteria from the searchable fields.
- **Layout Options:** Use the expandable Layout Options section to configure your list view. For more information, please refer to the [Layout Options](#) section of the Search documentation.
- **Saved Searches:** Save, recall, update, and delete searches which you use often. For more information, please refer to the [Saved Search](#) section of the Search documentation.



When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. When searching by a multiselect or dropdown field (e.g. "Assigned to"), however, Sugar will return records matching any of these selections. Once the search completes, the relevant results will populate in the list view below the search panel. To see all OAuth key records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters.

OAuth List View

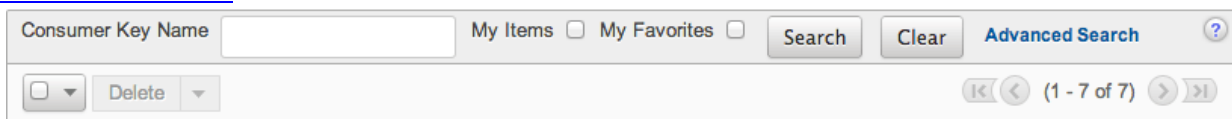
The OAuth list view displays all OAuth key records meeting the current search criteria. You can view the basic details of each key within the field columns.

You have the option to change what fields are displayed in list view by configuring your layout options in the OAuth Advanced Search. For more information on configuring your list view, please refer to the [Layout Options](#) section of the Search documentation.

Pagination

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

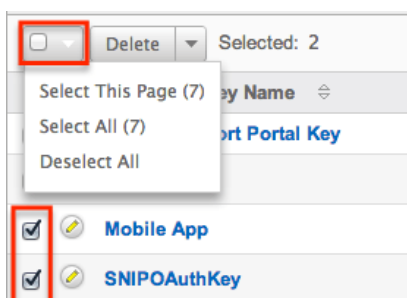
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [User Interface](#) section.



Checkbox Selection

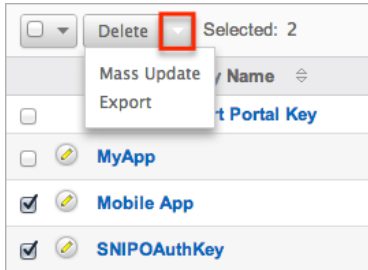
You can perform several actions on OAuth key records directly from the list view by first selecting the desired records. To select individual key records on the OAuth list view, mark the checkbox on the left of each row. To select or deselect multiple key records on the list view, use the options in the checkbox dropdown menu:

- **Select This Page:** Selects all records shown on the current page of key results.
- **Select All:** Selects all records in the current search results across all pages of key results.
- **Deselect All:** Deselects all records that are currently selected.



Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.



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

Menu Item	Description
Delete	Delete one or more OAuth keys at a time
Mass Update	Mass update one or more OAuth keys at a time
Export	Export one or more OAuth keys to a CSV file

Column Sorting

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



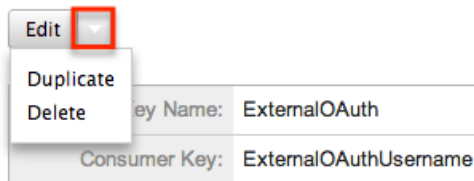
OAuth Detail View

The OAuth detail view displays thorough OAuth key information including all fields. You can also view a key's related tokens which appear in a subpanel beneath the key fields. The detail view can be reached by clicking a OAuth key record's link from anywhere in the application including from the OAuth list view.

Actions Menu

The Actions menu on the top left of each OAuth key's detail view allows you to perform various actions on the current record. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the [User Interface](#) section.

ExternalOAuth



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

Menu Item	Description
Edit	Edit this OAuth key
Duplicate	Duplicate this OAuth key
Delete	Delete this OAuth key

Next or Previous Record

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

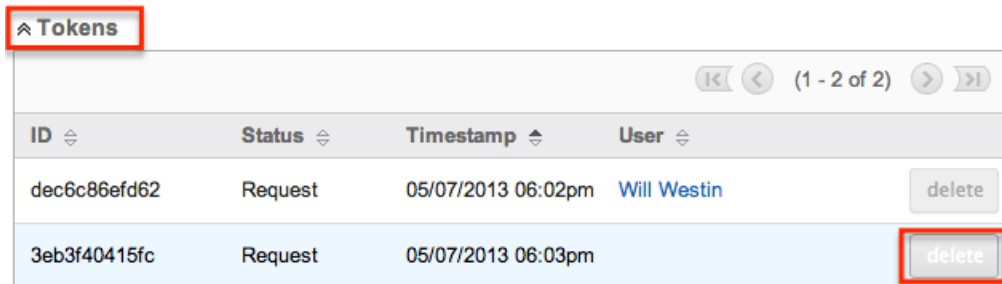
ExternalOAuth



Tokens

Beneath an OAuth key record's fields is a subpanel containing related token records. Tokens are created when the user establishes an OAuth connection with the OAuth key pair. These are connections between the Sugar user, the OAuth keys, and the permissions to enable the external application to access data. Tokens

created for each OAuth connection are listed in the Tokens subpanel of the corresponding OAuth detail view page. The Tokens subpanel can be collapsed or expanded by clicking the double arrow to the left of the subpanel's name.



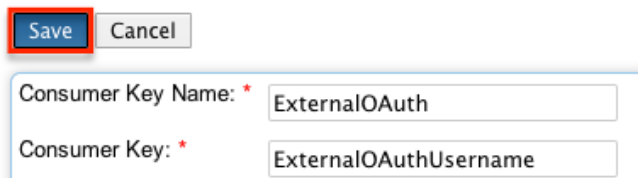
ID	Status	Timestamp	User	
dec6c86efd62	Request	05/07/2013 06:02pm	Will Westin	delete
3eb3f40415fc	Request	05/07/2013 06:03pm		delete

To delete a token from an OAuth key, choose "Delete" from the far right of the record's row. For more information on how to create and approve OAuth tokens, please refer to the [OAuth](#) documentation in the Developer guide.

Editing OAuth Keys

OAuth keys may be edited at any time to update or add information to the record. You can make changes to existing key records via the OAuth edit view and quick create forms. Edit view is available within the OAuth module and includes all of the key fields you should need.

[ExternalOAuth](#) » Edit

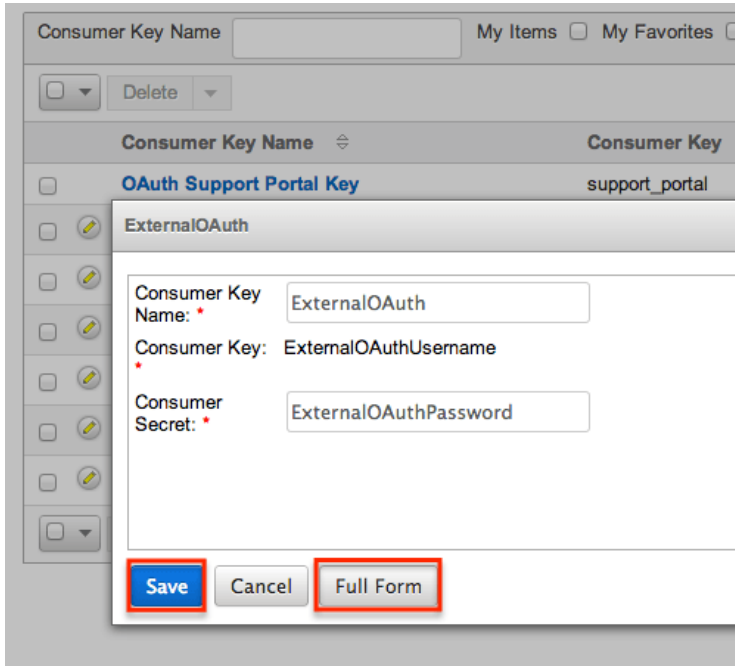


Save Cancel

Consumer Key Name: * ExternalOAuth

Consumer Key: * ExternalOAuthUsername

Quick create is available for editing keys from outside the OAuth module and opens as a pop-up without navigating away from your current page. It generally contains fewer fields, but the Full Form button may be used to access the full edit view should you need to edit additional fields.



Editing Via Detail View

You can edit OAuth keys via the [Detail View](#) by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve your changes.

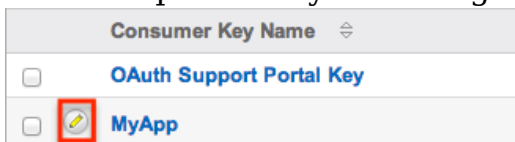
ExternalOAuth



Consumer Key Name:	ExternalOAuth
Consumer Key:	ExternalOAuthUsername

Editing Via List View

You can edit OAuth keys via the [List View](#) by clicking the Pencil icon to the left of each key's name. A pop-up window will open with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve your changes.



Deleting OAuth Keys

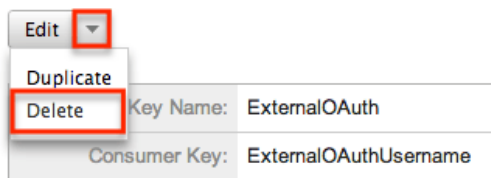
If an OAuth key record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the OAuth detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once.

Deleting Via Detail View

Use the following steps to delete an OAuth key record via the detail view:

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

ExternalOAuth

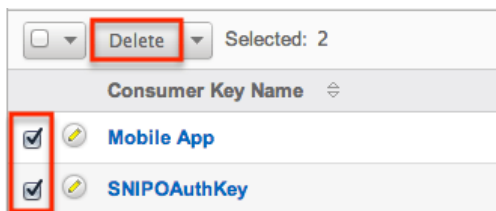


3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Mass Deleting Via List View

Use the following steps to delete one or more OAuth key records via the list view:

1. Navigate to the OAuth list view by clicking the OAuth module tab.
2. Use the [Basic](#) or [Advanced Search](#) to find the key records you wish to delete.
3. Select the desired key records individually or using the [checkbox dropdown's](#)
4. Choose "Delete" from the Actions menu.



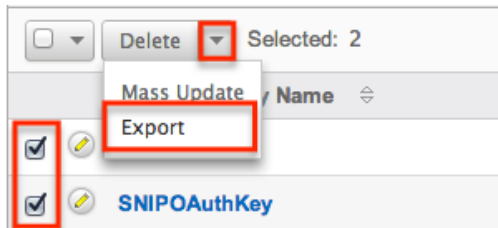
5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

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

Exporting OAuth Keys

Sugar's Export option allows users to download all fields for the selected OAuth keys to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use OAuth data with other software such as Microsoft Excel. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of key records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

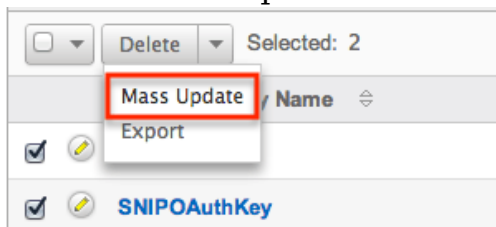
OAuth keys may be exported from the OAuth list view by selecting "Export" from the Actions menu.



Mass Updating OAuth Keys

Mass Updating allows users to make the same change to multiple OAuth key records at once from the OAuth list view. Due to the PHP memory limitations on the server, there may be occasions when the application times out while mass updating a large number of key records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches. Use the following steps to mass update OAuth key records from the list view:

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



5. Scroll to the Mass Update panel and set values for the fields you wish to alter.

Mass Update

Assigned User Id	<input type="text"/>	Client Type	<input type="text" value="-none-"/>
------------------	----------------------	-------------	-------------------------------------

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

Import Wizard

Import Wizard allows administrators to launch an import for any import enabled module without navigating to the module itself. After selecting "Import Wizard" from the Admin menu, you can select a module to perform an import on.

[Import](#) » Step 1: Select Data Source

Which module do you want to import data into?

After selecting the module, click "Next" to continue the import. The steps to complete the import are identical to performing an import from the module. For more information on how to perform an import, please refer to the [Import](#) documentation in the Application guide.

Upgrade Wizard

Upgrade Wizard allows administrators to upgrade their version of Sugar. Before performing an upgrade on a production instance of Sugar, we highly recommend taking backups of the Sugar file system and database as well as performing the upgrade on a test or development instance first. Instances hosted On-Demand will not have the Upgrade Wizard option, as upgrades will be handled by SugarCRM. For more information on how to perform an upgrade via the Upgrade Wizard, please refer to the [Upgrading](#) section in the Installation and Upgrade guide.

Backups

Backups allows administrators a simple method to backup the files in their instance of Sugar. Instances hosted On-Demand will not have the Backup option, as upgrades will be handled by SugarCRM.

Note: This routine will backup only the web files; the database is not backed up. Database backups should be performed regularly following instructions for your database vendor.

Use the following steps to backup the web files for your Sugar instance:

1. Enter in a directory to create the backup file in. This directory must be writeable by Sugar and the path needs to be fully qualified.

Note: It is not recommended to specify a path that points to any directory contained by the Sugar instance location on your server. Doing this repeatedly would continually increase the size of the backups as previous backup archives would accumulate into the most current backup.

2. Enter in a filename to use for the backup file. The filename should end with .zip.
3. Once the settings have been entered, click "Confirm Settings"

Backups

The purpose of this tool is to assist in creating backups of the Sugar application files. For more information on how to backup your database, see the documentation for information on how to backup your database.

To backup your Sugar application files in a .zip file, enter the following information:

Directory:

Filename:

4. The settings are confirmed by verifying the directory can be written to and the filename does not already exist. Once the settings are confirmed, click "Run Backup".
5. The backup can take some time depending on the size of your Sugar instance, and will return a message once complete.

Repair

Repair allows administrators to perform common maintenance routines on their instance of Sugar. The repair menu is available to only administrative users and can be accessed through Admin > Repair.

For more information on the different repair options available, please refer to the documentation in the Administration guide.

Diagnostic Tool

Diagnostic Tool allows administrators to create a file with many diagnostic and configuration details. This tool will collect basic system information regarding Sugar and server configuration and place it all into a zip file to help debug or diagnose issues. The Diagnostic Tool has options that you can turn on and off to include only specific configuration data. Select one or more of the following available options:

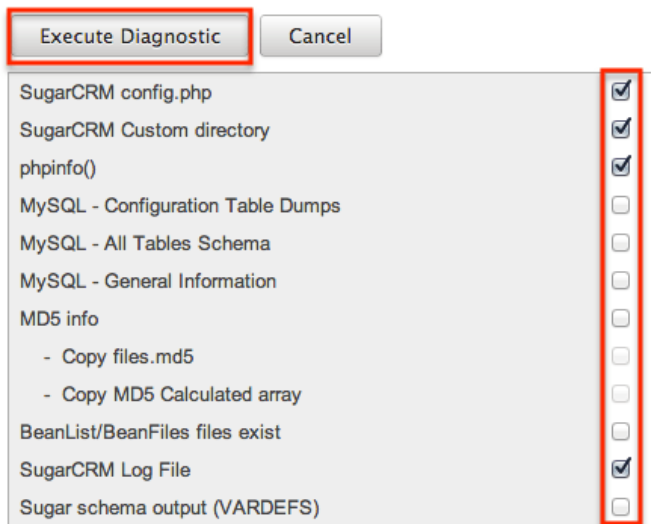
Option	Description
SugarCRM config.php	Includes a copy of the config.php file from the root directory of Sugar. This file contains many useful system settings options in Sugar.

	Note: The db password contained in this file is replaced with asterixs before sending for security purposes.
SugarCRM Custom directory	Includes a copy of the entire custom directory in Sugar.
Phpinfo()	Includes the output of the PHP function phpinfo() saved to an html file. The phpinfo() function returns information about how PHP is configured on the server running Sugar including the version of PHP, the loaded Extensions, and more.
MySQL - Configuration Table Dumps	Includes an HTML file for each configuration table in Sugar. The file has three sections: field definitions, indexes, and data.
MySQL - All Tables Schema	Includes an HTML file titled MySQLTablesSchema.html which has two sections for each table in Sugar: field definitions and indexes.
MySQL - General Information	Includes an HTML file titled MySQL-General-info.html. This file contains some basic information about the MySQL database Sugar is running on such as version number and character sets.
MD5 info	Includes a php file that shows any file in your instance of Sugar that has a different hash than the stock file. This can indicate which files are customized and where they are located in your file system.
Copy files.md5	Includes the list of all files and their original md5 hash in a file titled files.md5. Note: Only available when the MD5 info option above is selected.
Copy MD5 Calculated array	Includes the list of all files and their current hash in a php file titled md5_array_calculated.php. Note: Only available when the MD5 info option above is selected.

BeanList/BeanFiles files exist	Includes an HTML file titled beanFiles.html. This file contains a list of the modules in Sugar and checks all the references for that module to make sure they are correct.
SugarCRM Log File	Includes a copy of the current log file for Sugar.
Sugar schema output (VARDEFS)	Includes an HTML file titled vardefschema.html which contains detailed metadata on each table in Sugar.

The more options selected, the bigger the resulting zip file will be. Select the desired options and click "Execute Diagnostic".

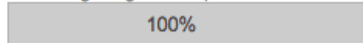
Diagnostic Tool



Once the diagnostic tool is finished, select "Download the diagnostic file" to download the zip file containing the results to your computer.

Diagnostic Tool

Executing Diagnostic Operations...



Getting config.php...
Done

Getting custom dir...
Done

Getting phpinfo()
Done

Getting sugarcrm.log
Done

[Download the Diagnostic file](#)
[Delete the Diagnostic file](#)

Optionally, you can then select "Delete the Diagnostic file" to remove it from the

server. Large diagnostic files should be deleted from the server as they can pile up and take necessary disk space.

Tracker

Tracker allows administrators to configure the system to track certain user actions and information for Sugar modules. This information is used in tracker reports and dashlets. By default the tracker options are disabled.

Use the following options to record tracker data:

- **Tracker Actions:** Tracks user actions such as modules accessed and records saved.
- **Tracker Sessions:** Tracks active users' session data such as session round trips.
- **Tracker Performance:** Tracks system performance such as database round trips, number of files accessed, server response time, and memory usage.
Note: This option can cause performance issues and should not be enabled in a production environment.
- **Tracker Queries:** Tracks any query that takes longer than the specified slow query time threshold and saves the data to the database. Tracker queries logs the query, how many times it has been run, the last time ran, and the average seconds the query took. "Log slow queries" also needs to be selected before this option tracks data.
Note: This option can cause performance issues and should not be enabled in a production environment.
- **Log slow queries:** Select this option to log queries that take longer than the slow query time threshold to the sugar log. This is useful for performance debugging.
Note: This option can cause performance issues and should not be enabled in a production environment.
- **Number of days of Tracker data to store when Scheduler prunes the tables:** Specify the number of days of data to be retained. The Prune Tracker Tables scheduler will remove any tracker records older than the specified number of days. For more information on the Prune Tracker Tables scheduler, please refer to the [Prune Tracker Tables](#) section of the Scheduler documentation in the Administration guide.
- **Slow query time threshold (msec):** Specify a threshold in milliseconds to begin logging slow queries at. If "Log slow queries" is selected, queries that take longer than the threshold to process will be logged to the sugar log. If "Tracker Queries" is selected, queries will be logged to the database.

Select the desired settings and click "Save" to preserve your changes.

Tracker

Save Cancel

	Enabled
Tracker Actions: <i>i</i>	<input type="checkbox"/>
Tracker Sessions: <i>i</i>	<input type="checkbox"/>
Tracker Performance: <i>i</i>	<input type="checkbox"/>
Tracker Queries: <i>i</i>	<input type="checkbox"/>
Log slow queries:	<input type="checkbox"/>
Number of days of Tracker data to store when Scheduler prunes the tables	<input type="text" value="30"/>
Slow query time threshold (msec):	<input type="text" value="100"/>

Note: Changing the Log slow queries and Slow query time threshold values will also change them in Admin > System Settings.

Scheduler

Scheduler provides administrators with a method to automate the execution of custom and system processes. The Scheduler menu is available to only administrative users and can be accessed through Admin > Scheduler. For more information on the different schedulers available, please refer to the [Schedulers](#) documentation in the Administration guide.

PDF

PDF allows administrators to set properties for PDF fiels generated from Sugar as well as configure the images to use for Quotes and Report PDFs. PDF is available to only administrative users and can be accessed through Admin > PDF. To modify the properties of a generated PDF enter appropriate values in the following fields:

- Title: The Title of the PDF Document.
- Subject: The Subject of the PDF Document.
- Author: The Author to indicate the origin of the PDF Document.
- Keyword(s): One or more Keyowrds to associated with the PDF Document.

All required fields are marked with a red asterisk and must be completed prior to saving. Once the necessary information is entered, click "Save".


Document Properties

Title: Subject:


Author: Keyword(s):

In the Images panel, the current image for Quote PDFs and Report PDFs are displayed. To change either image select "Choose File" next to the desired setting and navigate to the image file to use.

Images

For Quotes PDF Documents: (resized for display) 

Select New Image for Quotes: No file chosen

For Reports PDF Documents: 

Select New Image for Reports: No file chosen

Note: The PHP GD library must be installed on the webserver to successfully upload images in PNG format.

Mobile

Mobile provides administrators with the ability to enable or disable Sugar modules for Sugar Mobile and mobile browser access.

Mobile browser access enables users to access Sugar modules, including custom modules, within a web browser on a smartphone or PDA. Sugar Mobile and Sugar Mobile are native mobile applications that enables users to access Sugar from certain smartphones. For a list of supported devices, refer to the [Mobile Supported Platforms](#) page.

You can add, edit, and remove fields, including Calculated Value fields, to customize the mobile browser access layouts using Studio. For information on creating and editing fields, refer to the [Creating Fields](#) section of the Studio documentation. For information on changing page layouts, refer to the [Mobile Layouts](#) section of the Studio documentation.

Note : Calculated Value fields will not be updated in real time in mobile edit views.

Configuring Sugar Mobile

You can make the following configurations to Sugar Mobile using the settings available within Admin > Mobile:

-
- Configure the number of items displayed on each list view page. The default value is 10.
 - Configure the number of items displayed on each subpanel page. The default value is 3.
 - Configure what modules are available for use in Sugar Mobile and mobile browser access.

Log out of Sugar Mobile and log in again to see these changes in your mobile device.

Configuring Mobile Browser Access

You can make the following configurations to Sugar mobile browser access using the settings available within Admin > Mobile:

- Configure what modules are available for use in Sugar Mobile and mobile browser access.
Note : The Reports module is not available for Sugar mobile browser access.

Editing Mobile Settings

Use the following steps to edit the mobile settings from Admin > Mobile:

1. In the Listview items per page field, specify the number of records that display per page in list view on Sugar Mobile. The default is ten records per page.
2. In the Subpanel items per page field, specify the number of related records that display in each subpanel in detail view on Sugar Mobile. The default is three records per page.

Listview items per page: (Sugar Mobile Only)	<input type="text" value="10"/>
Subpanel items per page: (Sugar Mobile Only)	<input type="text" value="3"/>

3. To enable a module for the mobile solutions, drag it from the Disabled column to the Enabled column.

Enabled Modules	Disabled Modules
Accounts	Bug Tracker
Contacts	Campaigns
Leads	Contracts
Opportunities	Documents
Cases	Knowledge Base
Calls	Notes
Tasks	Products
Meetings	Projects
Reports	Targets
Employees	Notes

- To disable a module for the mobile solutions, drag it from the Enabled column to the Disabled column.
- Click "Save".

Mobile

Save
Cancel

Listview items per page:

Subpanel items per page:

Select modules to appear in the browser-based mobile view and in the Sugar Mobile application

Enabled Modules

Disabled Modules

Last Modified: 01/16/2016 12:34am

Repair

Overview

The repair functions in Sugar allow administrators to perform common maintenance routines on their instance of Sugar. The repair menu is available to only administrative users and can be accessed through Admin > Repair. The following sections are available options from the repair menu.

Quick Repair and Rebuild

The quick repair and rebuild is the most commonly used repair option and should be performed after significant changes have been made to your instance of Sugar. If you notice inconsistencies with module layouts or fields as you have customized

them via Studio, this option is normally the best first course of action to try and correct the issue. Sugar caches files to help access necessary files quickly. This option clears out many of the cached files in Sugar which allows new versions of the files to be loaded. The quick repair and rebuild option performs the following actions:

- Clear Vardefs From Cache : Deletes any *vardefs.php file in the cached modules folder.
- Clear Language Files From Cache : Deletes any {Module Name}.lang.php file in the cached modules folder.
- Clear Template Files From Cache : Deletes any .tpl files in the cached modules folder.
- Clear JavaScript Files From Cache : Deletes any *.js files in the cached modules folder.
- Clear JavaScript Language Files From Cache : Deletes any *.js files in the cached jsLanguage folder.
- Clear Dashlet Files From Cache : Deletes any *.php files in the cached dashlets folder.
- Clear Sugar Feed Files From Cache : Deletes the Sugar Feed files in cached modules folder.
- Clear Smarty Template Files From Cache : Deletes any *.tpl.php files in the cached smarty templates folder.
- Clear Theme Files From Cache : Deletes theme files in the cached theme folder for all themes in Sugar.
- Clear XML Files From Cache : Deletes any *.xml files in the cached xml folder.
- Clear Search Files From Cache : Deletes the unified_search_modules.php file in the cached module folder.
- Clear External API Cache Files : Deletes the external API cache PHP and JavaScript files in the cached include folder.
- Clear PDF Font Cache Files : Deletes the cached PDF font list file.
- Rebuild Extension Files : Rebuilds language files, extensions, dashlet containers, relationships, and the table dictionary. This step also clears any cached files by APC or WinCache, resets the Zend accelerator, clears eAccelerator's cache, and clears XCache cached files.

Note : These functions will only run if the associated systems are installed and running.

- Rebuild Audit Tables : Creates audit tables for any module that has audit enabled and where the audit table does not already exist. The results for each table are printed on the page.
- Repair Database Tables : Checks to make sure the database is in sync with the table dictionary and vardef files. Any missing tables, columns, and indexes will be scripted to be recreated as well as any column properties that are incorrectly set in the database.

The screen will display any database changes that should be made.

Click "Execute" to execute the script to apply the changes to the Sugar database or click "Export" to save the script to a SQL file.

Differences found between database and vardefs
The following script will sync the database structure with the structure of the database using external database management tools, or to allow

NOTE: any changes you make to the script in the textbox will be

```
/* Table : accounts */
/*COLUMNS*/
/* INDEXES */
/*MISSING INDEX IN DATABASE - idx_accnt_assigned_de
ALTER TABLE accounts ADD INDEX idx_accnt_assigned_de
/*Checking Custom Fields for module : Accounts */
CREATE TABLE accounts_cstm (id_c char(36) NOT NULL
/*MISSING IN DATABASE - test_c - ROW*/
ALTER TABLE accounts_cstm add COLUMN test_c varchar(255)
/*MISSING IN DATABASE - testint_c - ROW*/
ALTER TABLE accounts_cstm add COLUMN testint_c int(11)
```

Execute

Export

Upgrade Teams

The upgrade teams option performs some cleanup regarding team records in Sugar. This can be useful to restore the private teams for all users in the event they become corrupted or are removed for any reason. The upgrade teams option performs the following actions:

- Global Team : Creates or restores the global team if it does not exist or has been deleted. All users are then assigned to the global team if not already.
- Private Teams : Creates a private team for every user in the system that does not already have a private team and assigns the user to their private team.

The results are printed on the screen as to what teams already existed and what teams were created.

Expand Column Width

The expand column width option provides a fix for some limitations of MSSQL when requiring multi-byte characters in the database. This limitation only exists for systems running on a MSSQL database while using the MSSQL Drivers for PHP. This function is not available and not necessary to be run on any of the currently supported database platforms.

Note: We recommend running Sugar on at least version 2.0.1 of the SQLSRV Drivers.

Use the following steps to run the Expand Column Width repair option:

1. Select "Expand Column Width" from the Admin > Repair screen.
2. Select from the dropdown which of the following actions you would like to take:

Display SQL : Displays the appropriate sql commands on the screen.

Export SQL : Creates a .sql file containing the appropriate SQL commands.

Execute SQL : Executes the SQL commands on your database.

3. Select "Go" to perform the selected action.

What action would you like to take?



4. The script takes any field in the database that is type varchar, char, or text and increases the length of the field. The new length is set to three times the current length, or if that is higher than 255, the length is set to 255.

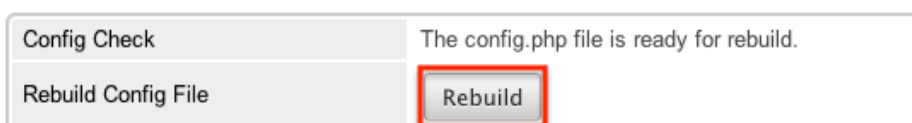
Rebuild .htaccess File

Rebuild .htaccess File option creates or updates the .htaccess file in the root of the Sugar directory. The .htaccess file contains specific commands to prevent unauthorized access to certain files and directories on your webserver. File permissions need to be configured correctly in order for Sugar to write to the .htaccess file. If writing to the file fails, the expected contents for the file will be printed on the page.

Note: If you have additional lines to add to the .htaccess file, place them outside of the "# BEGIN SUGARCRM RESTRICTIONS" and "# END SUGARCRM RESTRICTIONS" lines or they will be removed when running this repair function.

Rebuild Config File

The Rebuild Config File option takes the config.php file in the root directory of Sugar and rebuilds it to have all default values for any options not specified directly. It first runs a check to make sure Sugar can write to the config.php file and will return to you if it can or not. When ready to rebuild the config file select "Rebuild".



The default values for the config will be merged with any custom values currently set and will be loaded into the config.php file.

Rebuild Sugar Logic Functions

The Rebuild Sugar Logic Functions rebuilds the cache files for all Sugar logic functions in the system. The Sugar logic functions are primarily used as formulas in field definitions. The results of the repair are shown on the screen.

Rebuild Relationships

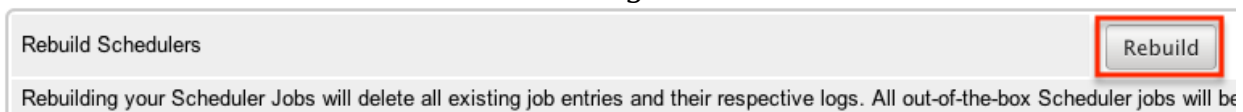
Rebuild relationships clears out the relationship cache and data and rebuilds it from the vardef files. Custom and stock relationships are all rebuilt. This repair option is good to run after an upgrade or when installing or uninstalling custom modules. The results of the repair are shown on the screen.

Rebuild Schedulers

The Rebuild Schedulers option removes all schedulers and recreates schedulers that come with Sugar by default. If you have customized the Active/Inactive flag, the frequency the job runs, or even deleted a job this repair option will restore all settings back to their original default value and recreate any deleted default schedulers.

Note: This also deletes any custom schedulers added to Sugar. If you have made changes to the default schedulers or created custom schedulers, please backup the details of each scheduler before running this repair.

The schedulers and their default settings are listed below:



Rebuild Schedulers

Rebuilding your Scheduler Jobs will delete all existing job entries and their respective logs. All out-of-the-box Scheduler jobs will be

Name	Interval	Range	Status
Process Workflow Tasks	As often as possible.	01/01/2005 05:30am - 12/31/2020 06:59pm	Active
Run Report Generation Scheduled Tasks	On the hour; 06:00am	01/01/2005 02:15am - 12/31/2020 06:59pm	Inactive
Prune Tracker Tables	On the hour; 02:00am; 1st	01/01/2005 12:00pm -	Active

		12/31/2020 06:59pm	
Check Inbound Mailboxes	As often as possible.	01/01/2005 02:00am - 12/31/2020 06:59pm	Active
Run Nightly Process Bounced Campaign Emails	On the hour; From 02:00am to 06:00am	01/01/2005 02:00pm - 12/31/2020 06:59pm	Active
Run Nightly Mass Email Campaigns	On the hour; From 02:00am to 06:00am	01/01/2005 08:15am - 12/31/2020 06:59pm	Active
Prune Database on 1st of Month	On the hour; 04:00am; 1st	01/01/2005 02:15am - 12/31/2020 06:59pm	Inactive
Update tracker_sessions Table	As often as possible.	01/01/2005 01:00am - 12/31/2020 06:59pm	Active
Run Email Reminder Notifications	As often as possible.	01/01/2008 08:30am - 12/31/2020 06:59pm	Active
Clean Jobs Queue	On the hour; 05:00am	01/01/2012 04:15am - 12/31/2030 06:59pm	Active

Rebuild Sugar Dashlets

Rebuild Sugar Dashlets deletes the cached dashlets.php file and recreates it. This file contains the path to the php files, the class to use, and the module for each dashlet in Sugar. This repair option is good to run when making changes to the dashlets that come with Sugar or custom dashlet loaded into Sugar. The results of the repair are shown on the screen.

Rebuild WorkFlow

Rebuild Workflow deletes files in the custom workflows folder for each module and then rebuilds the files from the workflow data in the database. This repair also verifies the proper logic hooks are in place to properly fire the workflows and rebuilds any plug-ins that are installed.

Rebuild Javascript Languages

The Rebuild Javascript Languages function deletes all files in the cached jsLanguage folder and deletes any {Module Name}.lang.php file in the cached modules folder. The cached files will be rebuilt when they are needed.

Rebuild JS Compressed Files

Rebuild JS Compressed Files takes every .js file located in the folder ./jssource/src_files/ and copies them to the root of your sugar directory. This will replace any compressed JavaScript files with the full readable versions. Any customizations made to the JavaScript files in the following folders and their subfolders will be lost:

- ./install/
- ./modules/
- ./themes/
- ./clients/
- ./include/
- ./service/
- ./styleguide/

Note: The process will continue working if you navigate away from this page, but if you wait you will see a notification on the page when it is complete.

Rebuild JS Grouping Files

Rebuild JS Grouping Files takes the many different JavaScript files that are required with Sugar and concatenates them together into the cache directory.

Note: The process will continue working if you navigate away from this page, but if you wait you will see a notification on the page when it is complete.

Rebuild Minified JS Files

Rebuild Minified JS Files takes every .js file located in the folder ./jssource/src_files/ and copies them to the root of your sugar directory. These files will then become compressed by removing new lines and unnecessary spaces. Compressing these files makes them harder to read for a person, but makes them smaller for transferring to web browsers.

Note: Not all files are compressed, but some are left in their original state. Any customizations made to the JavaScript files in the following folders and their subfolders will be lost:

- ./install/
- ./modules/
- ./themes/
- ./clients/
- ./include/
- ./service/
- ./styleguide/

This repair is essentially the same as performing a Rebuild JS Compressed Files followed by a Repair JS Files.

Note : The process will continue working if you navigate away from this page, but if you wait you will see a notification on the page when it is complete.

Rebuild Sprites

Rebuild Sprites takes images in the following directories:

- ./include/images
- ./themes
- ./custom/themes

Creates the sprites and metadata files in the ./cache/sprites/ folder.

Note: The process will continue working if you navigate away from this page, but if you wait you will see a notification on the page when it is complete.

Repair JS Files

Repair JS Files takes the current JavaScript files and compresses them by removing new lines and unnecessary spaces. Compressing these files makes them harder to read for a person, but makes them smaller for transferring to web browsers.

Note: Not all files are compressed, but some are left in their original state. If you have customized the JavaScript files, then performing this repair will not remove your customizations where others can.

Note: The process will continue working if you navigate away from this page, but if you wait you will see a notification on the page when it is complete.

Repair Non-Lowercase Fields

The Repair Non-Lowercase Fields option takes any custom field defined in Sugar and, if the field contains an upper case letter, it will change the field to be lowercase. The database, vardef files, and views are all searched through and corrected for and uppercase fields. This option also clears any vardef files from the cache when finished.




Repair Teams

The Repair Teams option runs a quick check against the database for every user. It performs the following checks:

- Users not in the global team
- Users who do not have a private team
- Users who are not a member of a team that a user who reports to them is a member of

If any of the checks return true, the page will indicate that records were found and the associated action will be selected by default. Select the options you wish to perform and click "Rebuild".

The selected options will perform the following:

 Repair Non-Lowercase Fields	Repair mixed-case custom table(s) and metadata file(s) to fix issues wh lowercase field names
 Repair Teams	Rebuilds private team memberships based on user reporting hierarchy
 Repair Roles	Repairs Roles by adding all new modules that support Access Controls, new Access Controls to existing modules

- Rebuild access to global team : Create a global team if one does not exist and loops through every user and adds them to the global team.
- Rebuild access to private team : Loops through every user and creates a private team if one does not exist, and then adds the user to their private team.
- Rebuild team hierarchy : Loops through every user and makes sure every

manager is included in their employees' teams. This ensures that if Sally reports to Jim, that Jim can see all of Sally's records.

Note: Sugar prevents a loop from being created via the Reports To field. For more information on setting the Reports To field, please refer to the [User Management](#) documentation.

- Clean up unused combinations of teams : Searches the database for unused combinations of teams and deletes the records from the database.

The users looped through are displayed on the screen when complete.

Repair Roles

Repair Roles goes through every ACL enabled module and ensures that there are appropriate database records to allow roles to be used on the specified module. This repair is important to run after adding new modules via Module Loader or Module Builder to make sure all of the role options are available for the new module. If there is a module that has ACL enabled for it, but the module does not show in the Roles section, then this repair option will add the module. The results of the modules accessed are printed on the screen.

Repair Oracle VARCHAR2 Columns

Repair Oracle VARCHAR2 Columns option alters varchar2 columns in Oracle that are set to a byte size instead of character size. This is necessary for UTF-8, MBCS support. If your columns are already set appropriately, this repair will return "No columns were discovered needing the VARCHAR2 char semantic change."

Note: This will return a SQL error if ran on MSSQL.

Rebuild fulltext indices

Rebuild fulltext indices runs a rebuild statement on the database for every fulltext index in the system. Rebuilding fulltext indices is important for returning results in a quick and efficient manner.

Note: This will return a SQL error if ran on MSSQL.

Repair Inbound Email Accounts

Repair Inbound Email Accounts loops through every active inbound email account in Sugar and verifies the settings configured. Any Inbound email account that fails to successfully repair will be listed on the page and will require someone to

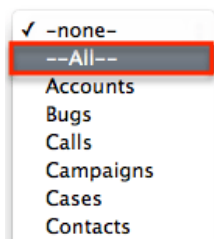
manually repair them by reentering a valid user name and password.

Remove XSS

The Remove XSS repair loops through the database and removes any malicious scripts from specified field types. Select a module from the dropdown, or select "All" to run for all modules.

Removes XSS Vulnerabilities from the database

Select a module to remove potential XSS strings. Select "All" to address every module. Press execute to start the detection and removal process.



The page will then display the count of records that will be scanned, and repaired if necessary. Click "Execute" to begin the repair.

Removes XSS Vulnerabilities from the database

Select a module to remove potential XSS strings. Select "All" to address every module. Press execute to start the detection and removal process.



1768 Object(s) found

You will see the count of Object(s) Repaired incrementing as it is running. Once the repair is complete you will get a popup message saying "Done." and the count repaired should match the count of objects found.

Repair Activities

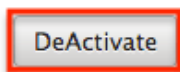
Repair Activities takes Call or Meeting records where the status field does not equal "Held" and updates the end date based on the duration of the activity. If the status equals "Held" or the record is marked as deleted, this repair will skip it. The screen will show "Done" when complete.

Enable/Disable Seed Users

The Enable/Disable Seed Users option will either enable or disable the default

users that are installed with Sugar when selecting a demo installation. If the first seed user retrieved from the database is set to "Active" then this option will give you the option to "Deactivate" the seed users, otherwise, you have the option to "Activate" the seed users.

Enable/Disable Seed
Users



This option will set the status based on the option presented for all users that have an id that starts with "seed".

Note: If you did not populate Sugar with demo data when installing, this repair will return "No seed users" and will not do anything.

Last Modified: 03/20/2017 07:40pm

Schedulers

Overview

Schedulers in Sugar provide users with a method to automate the execution of custom and system processes. Sugar comes with many default schedulers to perform jobs such as monitoring inbound emails, executing workflows, running reports, and dispatching campaign emails. Schedulers are available only to administrative users and can be accessed through Admin > Schedulers. The following sections are available options from the Schedulers menu.

Schedulers Fields

The Schedulers module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.

Field	Description
Active From	Time the scheduler begins to be active per day
Active To	Time the scheduler stops being active per day
Date & Time End	Date and Time the scheduler will stop running on the specified interval
Date & Time Start	Date and Time the scheduler will begin running on the specified interval

Execute If Missed	Specifies if a scheduler should be executed during the next cron run in the event that cron did not run at the exact time a job is scheduled for.
Interval	How often and when the schedule will run, defaults to every day, every minute
Job	The job to execute on the defined schedule
Job Name	The name or designation of the scheduler
Job URL	The URL of a page to execute Note : Only available if the Job select is URL.
Status	The current status of the scheduler (i.e. Active, Inactive)

Note : Any times configured for schedulers will be ran off of the admin user's time zone (user id = '1').

Default Schedulers

The default schedulers that come with Sugar are important for different aspects throughout the application. The following lists the default schedulers and their default settings:

Name	Interval	Range	Status
Process Workflow Tasks	As often as possible.	01/01/2005 05:30am - 12/31/2020 06:59pm	Active
Run Report Generation Scheduled Tasks	On the hour; 06:00am	01/01/2005 02:15am - 12/31/2020 06:59pm	Active
Prune Tracker Tables	On the hour; 02:00am; 1st	01/01/2005 12:00pm - 12/31/2020 06:59pm	Active
Check Inbound Mailboxes	As often as possible.	01/01/2005 02:00am - 12/31/2020 06:59pm	Active

Run Nightly Process Bounced Campaign Emails	On the hour; From 02:00am to 06:00am	01/01/2005 02:00pm - 12/31/2020 06:59pm	Active
Run Nightly Mass Email Campaigns	On the hour; From 02:00am to 06:00am	01/01/2005 08:15am - 12/31/2020 06:59pm	Active
Prune Database on 1st of Month	On the hour; 04:00am; 1st	01/01/2005 02:15am - 12/31/2020 06:59pm	Inactive
Update tracker_sessions Table	As often as possible.	01/01/2005 01:00am - 12/31/2020 06:59pm	Active
Run Email Reminder Notifications	As often as possible.	01/01/2008 08:30am - 12/31/2020 06:59pm	Active
Clean Jobs Queue	On the hour; 05:00am	01/01/2012 04:15am - 12/31/2030 06:59pm	Active
Removal of Documents From Filesystem	On the hour; 03:00am; 1st	01/01/2012 12:00am - 12/31/2030 03:59pm	Active

Process Workflow Tasks

Process Workflow Tasks scheduler is active and runs as often as possible by default. This scheduler processes and runs any time elapsed workflows that are due to be run. If you utilize time elapsed workflows, it is highly recommended to run this scheduler as often as possible to ensure the workflows are executed as quickly as possible.

For more information on creating workflows, please refer to the [Workflow Management](#) documentation in the Administration guide.

Note : Workflows processed by this scheduler are run by the admin user (user id = '1') unless the admin user is disabled.

Run Report Generation Scheduled Tasks

Run Report Generation Scheduled Tasks scheduler is active with an interval set to run daily at 6:00 AM by default. This scheduler executes any scheduled reports and emails the results to the designated user. We recommend editing this scheduler to run as often as possible so that users will be emailed their reports at the time they've specified in the Reports module.

For more information on scheduling reports, please refer to the [Scheduling Reports](#) section in the Reports documentation in the Application guide.

Prune Tracker Tables

Prune Tracker Tables scheduler is active and runs at 2:00 AM on the first day of every month by default. This scheduler will delete data in the tracker tables based on the tracker prune interval. This interval can be set from Admin > Trackers and defaults to 30 days if not set. Any record older than the specified amount of days will be deleted from the following tables :

- tracker
- tracker_sessions
- tracker_perf
- tracker_queries
- tracker_tracker_queries

Keeping this scheduler active helps ensure overall system performance is kept at optimum levels as these tables are continually updated via common actions in the application. For more information on trackers and setting this interval, please refer to the [Tracker](#) section in the System documentation in the Administration guide.

Check Inbound Mailboxes

Check Inbound Mailboxes scheduler is active and runs as often as possible by default. This scheduler will retrieve any unread email from active group inbound mail accounts configured in the system. Personal and bounce mail accounts are not checked by this scheduler. If the group email account is configured to create cases or to send auto-reply emails, then this scheduler will handle those tasks as well. For more information on how to setup and configure a group inbound email account, please refer to the [Email](#) documentation in the Administration guide.

Run Nightly Process Bounced Campaign Emails

Run Nightly Process Bounced Campaign Emails scheduler is active and runs on the hour, every hour from 2:00 AM to 6:00 AM by default. This scheduler will retrieve any unread email from active bounce inbound mail accounts configured in the system. Bounce email accounts are important for receiving any bounced emails from a campaign. Emails in the bounce mail account must match all of the following criteria to be classified as a bounced email:

- From Email Address must contain MAILER-DAEMON or POSTMASTER.
- Remove me link from the original email must be in the email body.
- The originating email does not have a campaign activity log type of invalid email or send error.

We recommend setting this scheduler to run at the same time and interval as the Run Nightly Mass Email Campaigns scheduler.

For more information on how to setup and configure a bounce inbound email account, please refer to the [Email](#) documentation in the Administration guide.

Run Nightly Mass Email Campaigns

Run Nightly Mass Email Campaigns scheduler is active and runs on the hour, every hour from 2:00 AM to 6:00 AM by default. This scheduler will process any campaign emails waiting to be sent in the email queue up to the configured batch amount. If the number of emails to send per batch is set to 500, and this scheduler is set to run once an hour, then you will be sending 500 emails per hour. Please configure this scheduler and the number of emails to send per batch to allow the proper amount of email to be sent.

Note : Many email providers place limitations on email send rates such as emails per hour, emails per day, unique recipients, etc. Please check with your email provider to ensure that they will be able to process the volume of emails you desire to send through campaigns.

For more information on setting the number of emails sent per batch, please refer to the [Campaign Email Settings](#) section in the Email documentation in the Administration guide.

Prune Database on 1st of Month

Prune Database on 1st of Month scheduler is inactive and runs at 4:00 AM on the first day of every month. Sugar implements a soft delete feature when deleting records through the application. Instead of deleting the record right away, the system marks a field called deleted in the database for the record. This scheduler runs through every table in the Sugar database and deletes any record that has this deleted flag. This is beneficial to keep the database small and efficient, but will remove the ability to recover accidentally deleted records. If you have a large

database, we recommend activating this scheduler and running it once a month for performance.

Note : Sugar keeps a backup of each record deleted by this scheduler in the form of a PHP file created in the cached backups folder. The file contains a SQL insert statement for each record in each table that was deleted to allow you to recover the data if necessary.

Update tracker_sessions Table

Update tracker_sessions Table scheduler is active and runs as often as possible by default. This scheduler updates the tracker_sessions table, setting all records that have a date older than six hours to not active. This ensures any user that is inactive for six hours or more will be logged out and their sessions will no longer be active. Please keep in mind that PHP settings on the server may be more restrictive than the six-hour limitation on inactivity this scheduler imposes.

Run Email Reminder Notifications

Run Email Reminder Notifications scheduler is active and runs as often as possible by default. This scheduler will send out email reminders for meetings and calls that have met or passed the reminder time. Meetings and calls need to have a status that does not equal "Held" in order for the email reminder to be sent to invitees.

Clean Jobs Queue

Clean Jobs Queue scheduler is active and runs every day at 5:00 AM by default. The jobs queue is essentially a log of when each scheduler has run. This scheduler will go through the job queues and either soft or hard delete old records in the jobs queue. A soft delete is simply hiding the record from Sugar, but keeping it in the database for recovery if necessary. A hard delete is permanently deleting it from the database. Job queue records will be soft and hard deleted by this scheduler with the following criteria:

- Soft Delete : Completed more than 7 days ago.
- Hard Delete : Completed more than 21 days ago.

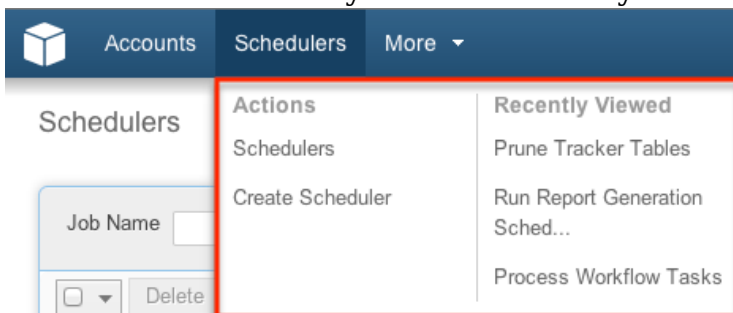
Note : The number of days for a soft and hard delete are configurable through the sugar config files by modifying the values of `$sugar_config['jobs']['soft_lifetime']` and `$sugar_config['jobs']['hard_lifetime']`.

Removal of Documents From Filesystem

Removal of Documents From Filesystem is active and runs on the first day of each month at 3:00 AM by default. This scheduler works as a follow-up to the Prune Database on 1st of Month scheduler. For records which contain a file such as the Documents or Notes module, the files are stored in the instance's uploads directory on the filesystem. If the record is deleted by a user from Sugar, the Prune Databases on 1st of Month Scheduler will remove the deleted records from the database. Then when the Removal of Documents From Filesystem scheduler runs, it will remove any files which were associated with deleted records.

Schedulers Module Tab

The Schedulers module tab is typically located on the navigation bar at the top of any Sugar screen after selecting "Schedulers" from the admin screen. Click the tab to access the Schedulers list view. You may also hover on the tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform important actions within the module. The [Recently Viewed menu](#) displays the list of schedulers you last viewed in the module. The [Favorites menu](#) displays the list of schedulers you most recently marked as favorites in the module.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Schedulers	Opens the list view layout to search and display schedulers
Create Scheduler	Opens the edit view layout to create a new scheduler

Creating Schedulers

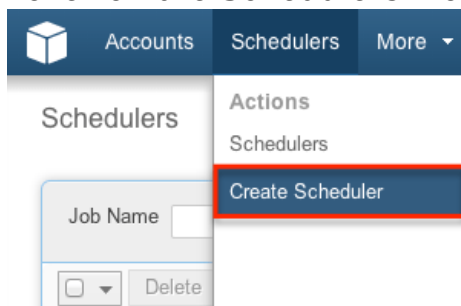
There are various methods for creating schedulers in Sugar including via the Schedulers module and via duplication. The full edit view layout opens when creating the scheduler directly from the Schedulers menu and includes all of the relevant fields for your organization's schedulers. Schedulers can be created for

built in jobs within the application or they can be created to call a URL outside of Sugar.

Creating Via Schedulers Module

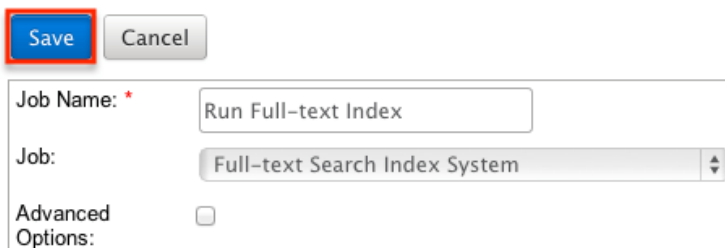
One of the most common methods of scheduler creation is via the Create Scheduler option in the Schedulers module tab. This opens up the edit view layout which allows you to enter in all the relevant information for the scheduler. Use the following steps to create a scheduler via the Schedulers module:

1. Hover on the Schedulers module and select "Create Scheduler".



2. Enter appropriate values for the [fields](#) in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving. For more information on setting the advanced options for the interval, please refer to the [Advanced Options](#) section.
3. Once the necessary information is entered, click "Save".

Create

A screenshot of the scheduler edit view form. At the top, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red rectangular box. Below the buttons, the form contains the following fields: 'Job Name: *' with the value 'Run Full-text Index', 'Job:' with a dropdown menu showing 'Full-text Search Index System', and 'Advanced Options:' with an unchecked checkbox.

Creating Via Duplication

You can also create a new scheduler by duplicating an existing scheduler record. The duplicate option is useful if the scheduler you are creating has similar information to an existing scheduler.

Use the following steps to create a scheduler by duplicating an existing record:

1. Navigate to a scheduler record's detail view.
2. Select "Duplicate" from the Actions menu.

Run Full-text Index ☆

Edit

Duplicate

Delete

Job Name: Run Full-text Index

Date & Time Start: 04/26/2013 01:45pm

Date & Time End:

- The displayed edit view is pre-populated with the original scheduler's values. Update the necessary fields, then click "Save". For more information on setting the advanced options for the interval, please refer to the [Advanced Options](#) section.

Create

Save

Cancel

Job Name: * Run External Update

Job: URL

Advanced Options:

Viewing Schedulers

There are various options available for viewing scheduler records in Sugar including via Schedulers list view, Schedulers detail view, and Schedulers Recently Viewed menu.

Viewing Via List View

The Schedulers list view displays all scheduler records meeting the current search criteria. To access the list view, simply click the Schedulers module tab. While list view shows key scheduler fields, you can click the scheduler's name to open the record in detail view. For more information on viewing scheduler via list view, please refer to the [Schedulers List View](#) section.

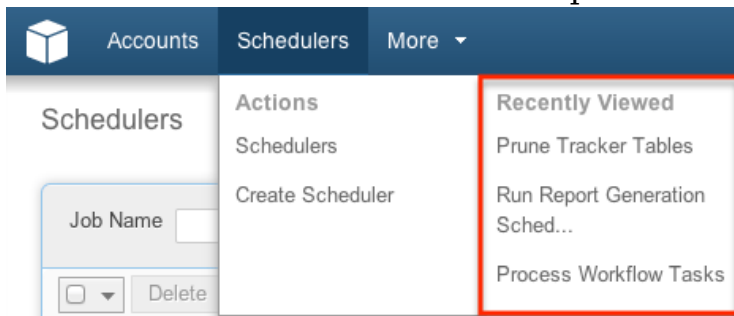
Viewing Via Detail View

The Schedulers detail view displays thorough scheduler information including all scheduler fields followed by the log records of when this scheduler has ran. The detail view can be reached by clicking a scheduler record's link from anywhere in the application including from the Schedulers list view. For more information on viewing scheduler via detail view, please refer to the [Schedulers Detail View](#)

section.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which scheduler you have recently viewed. Hover on the [Schedulers Module Tab](#) to see a list of your most recently viewed scheduler and click each name to open the scheduler in detail view.



Searching Schedulers

The Schedulers list view includes a Basic Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Schedulers list view below. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the [Search](#) documentation.

Basic search offers a few, commonly used fields for a simplified search experience. The buttons in Basic Search panel have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.

Schedulers

Job Name

Once the search is complete, the relevant results will populate in the [list view](#) below the search panel. To see all scheduler records, simply click "Clear" and then "Search" to perform a blank search with no filters.

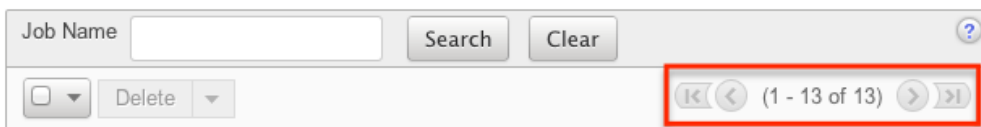
Schedulers List View

The Schedulers list view displays all scheduler records meeting the current search criteria. You can view the basic details of each scheduler within the field columns.

Pagination

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

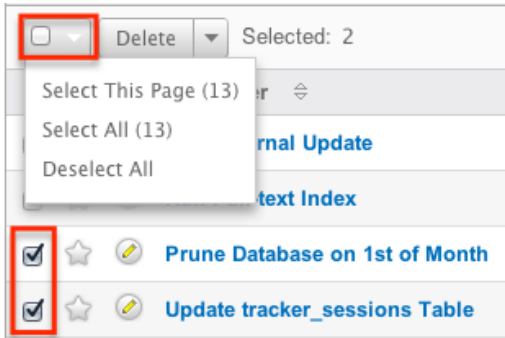
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.



Checkbox Selection

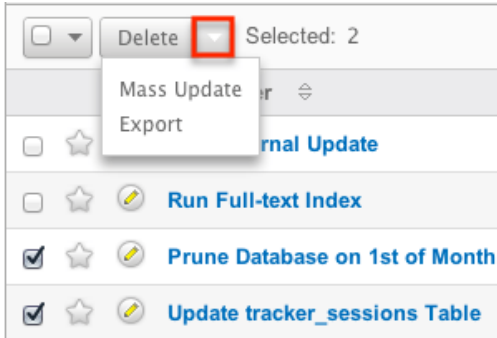
You can perform several actions on scheduler records directly from the list view by first selecting the desired records. To select individual scheduler records on the Schedulers list view, mark the checkbox on the left of each row. To select or deselect multiple scheduler records on the list view, use the options in the checkbox dropdown menu:

- **Select This Page** : Selects all records shown on the current page of scheduler results.
- **Select All** : Selects all records in the current search results across all pages of scheduler results.
- **Deselect All** : Deselects all records that are currently selected.



Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.

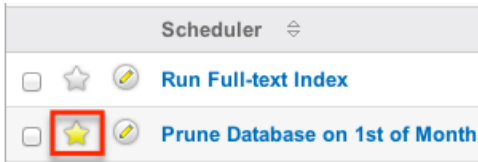


The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Delete	Delete one or more schedulers at a time
Mass Update	Mass update one or more schedulers at a time
Export	Export one or more schedulers to a CSV file

Favorite Designation

Users have the option to mark scheduler records as favorites via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Schedulers module tab. In the Schedulers list view, the star on the left of each schedule's row is yellow once marked to indicate a favorite schedule. For more information on marking records as favorites, please refer to the [Favoriting Schedulers](#) section of this documentation.



Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time.



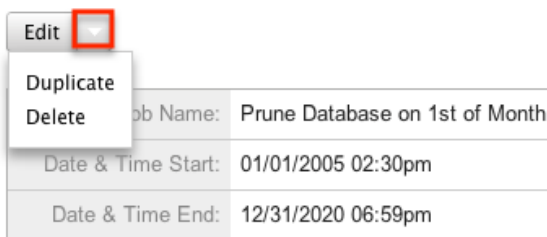
Schedulers Detail View

The Schedulers detail view displays thorough scheduler information including all scheduler fields which are grouped by default into the Overview, More Information, and Other panels. You can also view a scheduler's log which appears in beneath the scheduler fields. The detail view can be reached by clicking a scheduler record's link from anywhere in the application including from the Schedulers list view.

Actions Menu

The Actions menu on the top left of each scheduler's detail view allows you to perform various actions on the current record. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the [System](#) documentation in the Administration guide.

Prune Database on 1st of Month



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

Menu Item	Description
Edit	Edit this scheduler
Duplicate	Duplicate this scheduler
Delete	Delete this scheduler

Favorite Designation

Users have the option to mark scheduler records as a favorite via the detail view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Schedulers module tab. In the Schedulers detail view, the star on the right of the scheduler's name is yellow once marked to indicate a favorite scheduler. For more information on how to mark records as favorites, please refer to the [Favoriting Schedulers](#) section of this documentation.

Prune Database on 1st of Month 

Edit ▾

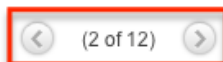
Job Name:	Prune Database on 1st of Month
Date & Time Start:	01/01/2005 02:30pm
Date & Time End:	12/31/2020 06:59pm

Next or Previous Record

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

Prune Database on 1st of Month 

Edit ▾



Job Log

Beneath a schedule record's fields is a subpanel containing the logs of when the scheduler has ran. Each record will contain a Job Status field indicating the

outcome of the job and an Execute Time field to show when the job started.

^ Job Log

Job Name	Job Status	Execute Time	Date Modified
Process Workflow Tasks	done	04/26/2013 05:30pm	04/26/2013 05:30pm
Process Workflow Tasks	done	04/26/2013 05:29pm	04/26/2013 05:29pm
Process Workflow Tasks	done	04/26/2013 05:28pm	04/26/2013 05:28pm

Editing Schedulers

Schedulers may be edited at any time to update or add information to the record. You can make changes to existing scheduler records via the Schedulers edit view and quick create forms. Edit view is available within the Schedulers module and includes all of the Scheduler fields you should need.

[Process Workflow Tasks](#) » Edit

Job Name: *

Job:

Advanced Options:

Interval: * Every Every Day Thursday Monday Friday Tuesday Saturday Wednesday Sunday

Quick create is available for editing schedulers from outside the Schedulers module and opens as a pop-up without navigating away from your current page. It generally contains fewer fields, but the Full Form button may be used to access the full edit view should you need to edit additional fields.

Schedulers

Job Name Search Clear

Prune Database on 1st of Month

Job Name: * Prune Database on 1st of Month

Job: Prune Database on 1st of Month

Advanced Options:

Interval: * Every 12 Hours

Every Day Thursday
 Monday Friday
 Tuesday Saturday
 Wednesday Sunday

Save Cancel Full Form

For more information on setting the advanced options for the interval, please refer to the [Advanced Options](#) section.

Editing Via Detail View

You can edit schedulers via the detail view by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve your changes.

Prune Database on 1st of Month

Edit

Job Name:	Prune Database on 1st of Month
Date & Time Start:	01/01/2005 02:30pm
Date & Time End:	12/31/2020 06:59pm

Editing Via List View

You can edit schedulers via the list view by clicking the Pencil icon to the left of each scheduler's name. A pop-up window will open with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve your changes.

Scheduler	Interval
Run Full-text Index	As often as possible.

Deleting Schedulers

If a scheduler record is invalid and should no longer appear in your organization's Sugar instance, it may be deleted from either the Schedulers detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once.

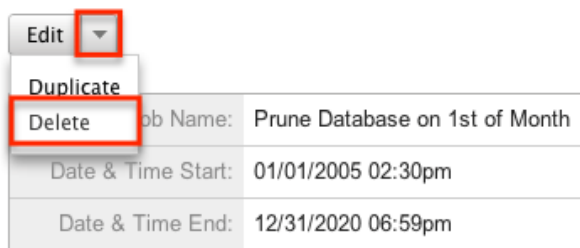
Note : If you wish to disable a scheduler but do not want to delete it, you can set the status to Inactive and it will not run.

Deleting Via Detail View

Use the following steps to delete a scheduler record via the detail view:

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

Prune Database on 1st of Month 

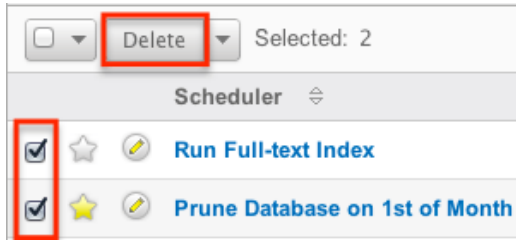


3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Mass Deleting Via List View

Use the following steps to delete one or more scheduler records via the list view:

1. Navigate to the Schedulers list view by clicking the Schedulers module tab.
2. Use the [Search](#) to find the scheduler records you wish to delete.
3. Select the desired scheduler records individually or using the [checkbox dropdown's](#) options.
4. Choose "Delete" from the Actions menu.



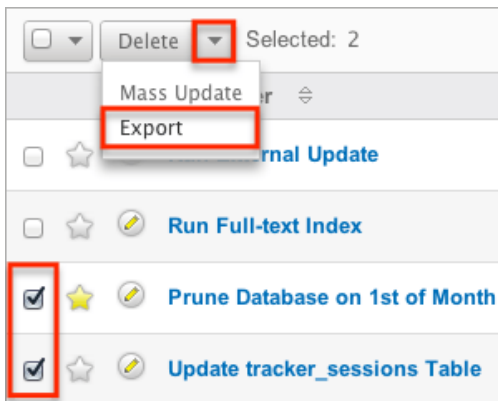
5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

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

Exporting Schedulers

Sugar's Export option allows users to download all fields for the selected schedulers to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Scheduler data with other software such as Microsoft Excel. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of scheduler records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Schedulers may be exported from the Schedulers list view by selecting "Export" from the Actions menu.

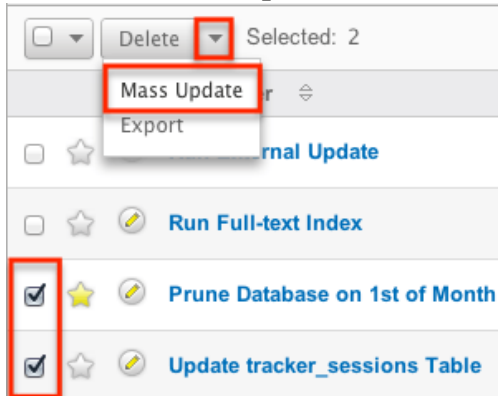


Mass Updating Schedulers

Mass Updating allows users to make the same change to multiple scheduler records at once from the Schedulers list view. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. Due to the PHP memory limitations on the server, there may be occasions when the application times out while mass updating a large number of scheduler records. If you encounter an error when performing this action, we

recommend selecting the records in smaller batches.
Use the following steps to mass update scheduler records from the list view:

1. Navigate to the Schedulers list view by clicking the Schedulers module tab.
2. Use the list view's [Search](#) to find schedulers you wish to modify.
3. Select the desired schedulers individually or using the [checkbox dropdown's](#) options.
4. Choose "Mass Update" from the Actions menu.



5. Scroll to the Mass Update panel and set values for the fields you wish to alter.

Mass Update

Job	-none-	Date & Time Start	
Date & Time End		Advanced Options	-none-
Last Successful Run		Status	-none-
Execute If Missed	-none-		

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




Favoriting Schedulers

Each Sugar administrator has the option to designate their own favorite schedulers which are important or will be viewed often. Once records are marked as favorites, you can select your most recent favorites directly from the [Schedulers Module Tab](#).

Favoriting Via List View

Use the following steps to mark records as favorites via the Schedulers list view:


1. Navigate to the Schedulers list view by clicking the Schedulers module tab.
2. Use the [Search](#) to find the scheduler records you wish to mark as favorites.
3. Click the star icon on the left of each desired scheduler's row.
4. To remove the scheduler as a favorite, click the star again to revert it to white.

Scheduler	Interval
<input type="checkbox"/>   Prune Database on 1st of Month	On the hour; 04:00am; 1st
<input type="checkbox"/>   Run External Update	As often as possible.

Favoriting Via Detail View

Use the following steps to mark records as favorites via the Schedulers detail view:

1. Navigate to a scheduler record's detail view.
2. Click the star icon to the right of the scheduler's name in the upper left of the detail view to designate it as a favorite.
3. To remove the scheduler as a favorite, click the star again to revert it to white.

Prune Database on 1st of Month 

Edit ▾

Job Name:	Prune Database on 1st of Month
Date & Time Start:	01/01/2005 02:30pm
Date & Time End:	12/31/2020 06:59pm


Advanced Options


From the edit view of a scheduler, you can select the Advanced Options checkbox to refine the interval of the scheduler as well as configure the advanced options panel.

Must contain one number (0-9):

Must contain one of the following special characters (-,!,@,#,\$,%^,&,*,(,),_,+,-,=,.,|):

Hide Advanced Options

Regex Requirement: 

Regex Description: 

This opens up the cron tab notation for the interval field. Cron tab notation gives administrators more flexibility to define when and how often the scheduler runs. Cron tab notation allows you to enter a value for each time part for the job to run on. You can specify complex values by using the following notations:

Character	Description
*	Asterisk is used to represent every value for the specified time part. For example, * in the mins field will run every minute.
/	Slash is used to represent increments. For example, */15 in the mins field will run every 15 minutes. 30/5 in the mins fields will run starting at the 30th minute of the hour and every 5 minutes after.
,	Comma is used to specify multiple values. For example, 18,20 in the hrs field will run at 6:00 PM and 8:00 PM.
-	Hyphen is used to specify a range of values. For example, 1-6 in the mo field will run from January through June.

Specify the values to run in the following interval fields using cron tab notation:

- min : Specify the minute of the hour to run on (0-59).
- hrs : Specify the hour of the day to run on (0-23).
- date : Specify the day of the month to run on (1-31).
- mo : Specify the month of the year to run on (1-12).
- day : Specify the day of the week to run on (0-6).

You may specify any combination of the fields to create the schedule needed to run the job.

Setting up Cron Scheduler

In order for the schedulers to run at the designated times, there needs to be a process running on the server to initiate the schedulers. This backend process will call the cron.php file in Sugar with some specific parameters, and the cron.php file will execute the schedulers as necessary.

Sugar instances hosted On-Demand by SugarCRM have the cron scheduler setup for you, but for on-site instances you will need to configure cron yourself. In UNIX systems (MAC and Linux) you can configure crontab to run the schedulers, and in Microsoft Windows you can use the Task Scheduler.

Brief instructions for the system Sugar is running on are provided below the Schedulers list view.

To Setup Crontab

Note: In order to run Sugar Schedulers, add the following line to the crontab file:
* * * * * cd /Applications/MAMP/htdocs/ult670_2; php -f cron.php > /dev/null 2>&1

Note : The Scheduler is throttled by default to prevent it from being ran more often than every 30 seconds. This value is configurable by setting the `$sugar_config['cron']['min_cron_interval']` value in the `config_override.php` file.

Setting Up in Unix/Linux

Use the following steps to setup crontab to run the Sugar schedulers:

1. From a command prompt, execute the following command: "crontab -u apache -e".
2. This will launch a text editor as the user apache. If your webserver is running under a different user, please adjust the line accordingly. Add in the commands from the Schedulers list view into the crontab file:
* * * * * cd /Applications/MAMP/htdocs/ult670_2; php -f cron.php > /dev/null 2>&1
Note : Make sure the path to the root directory of Sugar and to php is correct.
3. Save the changes to the file. This will run the cron job every minute.
4. You can check crontab to see what commands are being ran by executing the following command:
crontab -u apache -l

Setting Up in Windows

Use the following steps to setup the Task Scheduler to run the Sugar schedulers:

1. Open up Notepad.
2. Add in the commands from the Schedulers list view into the empty text file:
cd C:\Program Files (x86)\Apache Software Foundation\Apache2.2\htdocs\ult670
php.exe -f cron.php
Note : Make sure the path to the root directory of Sugar and to php.exe is correct.
3. Save the file with extension .bat to save it as a batch file.
4. Open the Task Scheduler and create a new Task.
5. We recommend setting the task to repeat every minute indefinitely, but you can configure how often you would like it to run.
6. Set the action of the new task to Start a program and set it to call the batch file created in Step three.

7. Click "OK" to save the new task.

Last Modified: 05/24/2016 02:05pm

Email

Overview

Sugar comes with many different abilities in regards to email and many of these abilities require an administrator to setup or configure them. Email administration includes email settings, campaign email settings, email archiving, inbound email, and the email queue.

Email Settings

The Email Settings section allows Sugar administrators to configure the system's outbound email settings as well as additional email and security options. Make any necessary changes in the sections below and click "Save" to commit the changes.

Email Settings



Outgoing Mail Configuration

The Outgoing Mail Configuration section contains details for sending email notifications, scheduled reports, workflow alerts, etc. The information here is also presented during the Admin Wizard upon first login to Sugar after installation. For more information on populating outgoing mail configuration data during the first login, please refer to the [Admin Wizard](#) documentation.

Enter appropriate values for the following fields keeping in mind all required fields are marked with a red asterisk and must be completed prior to saving:

- From Name : The name outgoing email will come from; for example, the name of your organization. Defaults to "SugarCRM".
- From Address : The email address outgoing email will come from. Defaults to "do_not_reply@example.com".

Note : If specifying a different address than the email address associated with the account you are authenticating, the email server being utilized may need to be configured to allow the email account to send email as the entered From

Address.

- Choose Your Email Provider : Choose your mail provider to populate provider specific values.
- SMTP Server : The web address of the external email server Sugar will connect to.
- SMTP Port : The communication port number used for connecting to the mail server.
- Use SMTP Authentication? : Check this box to connect to the SMTP server using a user name and password. If left unchecked, the SMTP server must accept anonymous connections, which is not recommended.
- Enable SMTP over SSL or TLS? : Select the appropriate option from the dropdown to use Secure Socket Layer, Transport Layer Security, or no encryption when connecting to the mail server.
- Email Address / Username : Enter the email address or user name to connect to the SMTP server with.
- Password : Enter the password associated with the entered email address or user name.
- Allow users to use this account for outgoing email : Check this box if you would like users to be able to send emails using the same outbound mail account. If the option is not selected, users will still be able to use the outbound mail server to send emails by entering their personal mail account information in their user preferences. For more information on setting up the email settings in user preferences, please refer to the [Email Settings](#) section of the Getting Started documentation.

Once the appropriate mail server information is entered, you can send a test email to make sure it is configured properly. Click "Send Test Email", enter your email address, and send the test. If you do not receive the test email, re-enter the account information including the password to ensure it is all correct.

Outgoing Mail Configuration
 Configure the default outgoing mail server for sending email notifications, including workflow alerts.

"From" Name: *

"From" Address: *


Choose your Email provider

SMTP Mail Server: * SMTP Port: *

Use SMTP Authentication: Enable SMTP over SSL or TLS?

Gmail Email Address *

Gmail Password *

Allow users to use this account for outgoing email: 

Email Options

The Email Options section provides some global options for email configuration. Check the box next to the desired options:

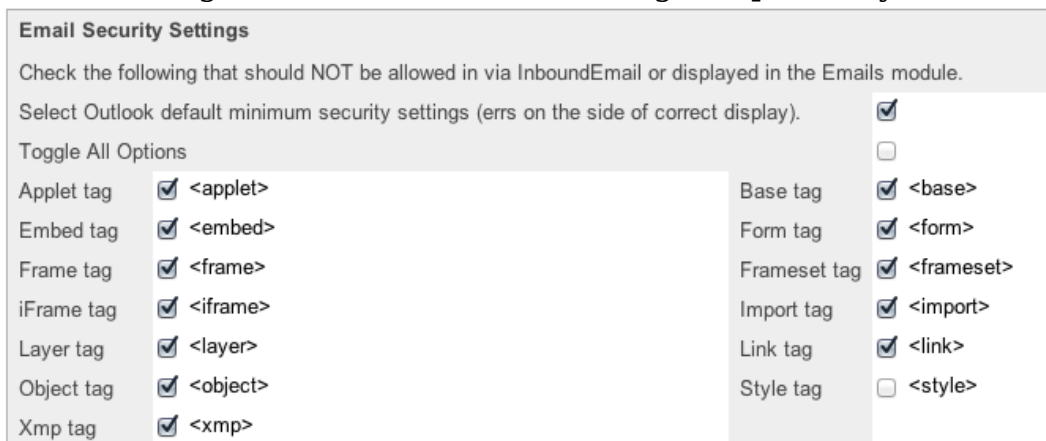
- **Assignment Notifications** : Sends email notifications to users automatically when records are assigned to them. When assigning a record to yourself, you will not receive a notification of the assignment. Default is checked.
 Note : To receive notifications, users must also have "Notify on Assignment" checked in their user profile.
- **Delete related notes & attachments with deleted Emails** : Related notes and attachments are deleted when an email is deleted. This ensures that data is not orphaned in the system when an email is deleted. Default is checked.
- **Send notification from assigning user's e-mail address** : Sends notifications from the email address and name of the user who is assigning a record to another user. Default is not checked.
 Note : The SMTP server being used must allow sending from a different email address than the authenticated account and the email account may need to be configured to allow the Send As permission.

Email Security Settings

The Email Security Settings section allows Sugar administrators to decide which HTML tags are allowed to be displayed in Sugar. The selected tags will not be allowed for viewing within Sugar. There are two options to mass set the tag selection:

- **Select Outlook default minimum security settings** : Select this option to automatically select every tag that Outlook also restricts. This will not strip the style tag which is used by default in Outlook. This option is selected by default.
- **Toggle All Options** : Select this option to either select all tags, or deselect all tags.

After selecting one of those options you can individually select or deselect additional tags to restrict or allow the tags respectively.



Email Security Settings	
Check the following that should NOT be allowed in via InboundEmail or displayed in the Emails module.	
Select Outlook default minimum security settings (errs on the side of correct display).	<input checked="" type="checkbox"/>
Toggle All Options	<input type="checkbox"/>
Applet tag <input checked="" type="checkbox"/> <applet>	Base tag <input checked="" type="checkbox"/> <base>
Embed tag <input checked="" type="checkbox"/> <embed>	Form tag <input checked="" type="checkbox"/> <form>
Frame tag <input checked="" type="checkbox"/> <frame>	Frameset tag <input checked="" type="checkbox"/> <frameset>
iFrame tag <input checked="" type="checkbox"/> <iframe>	Import tag <input checked="" type="checkbox"/> <import>
Layer tag <input checked="" type="checkbox"/> <layer>	Link tag <input checked="" type="checkbox"/> <link>
Object tag <input checked="" type="checkbox"/> <object>	Style tag <input type="checkbox"/> <style>
Xmp tag <input checked="" type="checkbox"/> <xmp>	

Campaign Email Settings

The Campaign Email Settings section allows Sugar administrators to configure some backend settings for sending campaign emails. Select the appropriate values for the following fields keeping in mind all required fields are marked with a red asterisk and must be completed prior to saving:

- **Number of emails sent per batch** : When the "Run Nightly Mass Email Campaigns" scheduler runs, it will send out the specified number of emails for a single run. The default is set to 500. Some mail servers have one or more of the following restrictions for a specific timeframe (e.g. hour, day, etc.): the number of unique recipients, how many times the same email can be sent to individual recipients, and the most common, how many emails can be delivered. This setting helps control the outgoing email to conform to these restrictions. For example, if your scheduler is set to run every hour, the number of emails to send per batch is set to 500, and you have 1600 emails to

send out, starting at 2:00 AM the last batch of emails will be sent at 5:00 AM. Please check with your email provider to determine the proper level.

- Location of campaign tracking files : Campaign tracking files log responses from campaign targets. If you are running Sugar on an external network, select "Default" to accept the default location. However, if your Sugar instance is behind a firewall, then choose "User Defined" and specify the path to your external web server in the field below. The external web server must have the ability to connect to your Sugar instance behind the firewall. Ensure that you create a file named index.php to handle requests for three different types of entry points: campaign_trackerv2, removeme, and image, and place the index.php file in the path to your external web server. This index.php file must make the appropriate calls to the index.php file located in the root of your Sugar instance in order to properly record the activities in Sugar. For more information on how to setup a custom campaign tracker page, please refer to the [Using a Custom Page For Campaign Trackers](#) section of the Advanced Config Options documentation in the Administration guide.
- Keep copies of campaign messages : Set this option to "Yes" to keep a copy of every email sent during a campaign. If "No" is selected, the template is stored, but not the individual emails sent. Default is set to "No".
Note : Storing every email sent does take up space in the database and can reduce performance. We recommend setting this value to "No".

Campaign Email Settings

Outbound Email Options

Number of emails sent per batch: *

Location of campaign tracking files (like campaign_tracker.php) * Default User Defined

Keep copies of campaign messages: * Yes No i

Make any necessary changes and click "Save" to commit the changes.

Email Archiving

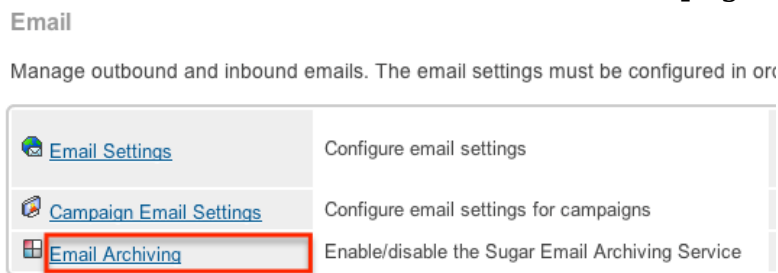
Sugar Email Archiving allows users to easily archive email to Sugar records simply by sending the email to a special email address. The email archiving service monitors the email address and imports the email into your instance of sugar and links related records without the use of a plug-in or other synching process. This service is only available for Sugar Professional subscriptions and above.

Enabling Email Archiving

Before you can use Sugar Email Archiving, you need to enable the service for your instance. Email Archiving can only be activated for one instance per license key. If you have a test instance with Email Archiving activated, that service will need to be deactivated before your production instance can be activated.

Use the following steps to enable email archiving via the administration page:

1. In the Email section of the administration page, Select "Email Archiving".



2. Read the Email Archiving feature description, Master Subscription Agreement, and privacy policy.
3. Select the checkbox to agree to the terms and click "Enable Email Archiving".



Note : Your instance needs to be reachable over the internet from SugarCRM's Email Archiving server. Specifically, the URL `http(s)://{site_url}/service/v4/rest.php` needs to be accessible from our On-Demand IP range, 70.42.242.0/24 (this is the same as 70.42.242.0 with a 255.255.255.0 subnet mask). This `site_url` value is specified in your `config.php` and must match the publically accessible URL.

4. The next screen displays a status of Enabled and your instance's unique email address for Email Archiving.
5. Click "Disable Email Archiving" to turn off this feature.
Note : If you disable and re-enable Email Archiving you will receive a different unique email address.

Using Email Archiving

To automatically archive an email into Sugar using the Email Archiving service, simply include your system's unique email address in the To, Cc, or Bcc fields when composing, replying, or forwarding an email. The email will then be archived into your Sugar database including any attachments on the email.

Sugar will automatically create relationships to the imported email for any stock module records that match an email address in the From, To, and Cc fields in the email. The email will then show in the History subpanel for any matching records.

Note : The Bcc field can not be seen by the Sugar email archive service just like they are not visible to any other recipient of the email.. Any email addresses

included in the Bcc will not get relationships made to them from the email. The following are some features and limitations for the email archiving service:

- **Meetings** : If the email archived contains a calendar event, Sugar will archive the email as well as create a Meeting record. The meeting created will also be related to the matching records in Sugar via the email addresses in the From, To, and Cc fields.
- **Cases** : Email containing the case macro in the email's Subject field will also be archived to a Case record. By default, the case macro is [CASE:{number}], meaning that an email with subject "[Case:1024] Help needed!" will be automatically archived to case number 1024. For more information on how to change the case macro, please refer to the [Modifying Case Macro](#) section.
- **Custom Modules** : Currently, Sugar Email Archiving is only able to match email addresses on stock modules. Any relationships between the archived email and custom modules will have to be made manually.
- **Size Limit** : Sugar Email Archiving can process emails up to 10 MB in size including attachments.
- **Implicit Relationships** : Sugar Email Archiving creates an implicit relationship between the email and matching records via the email addresses on the email. This implicit relationship behaves and sometimes displays differently than an explicit relationship. For example, an email implicitly related to Beth Roberts' Contact record would appear in her History subpanel just like one that is explicitly related. However, if Beth's email address is updated in Sugar, the emails created via Sugar Email Archiving will no longer appear in her History since the email addresses no longer match. You can explicitly relate a contact to an email by selecting the contact in the email's Contacts subpanel.

Inbound Email

Inbound Email allows external email to be pulled into Sugar and can be accessed from the admin page under the Email section. Inbound accounts can be configured as personal, group, or bounce mail accounts. There are various ways you can create inbound accounts in Sugar such as via the Inbound Email module tab and the Emails module. Once the inbound account record is created, you can view and edit information via the Inbound Email detail view. Some inbound accounts can be configured to create Case records in Sugar or send automatic replies to imported email. This section will cover how to use the Inbound Email module as well as the various actions and options available from within the module.

Inbound Email Fields

The Inbound Email module contains a number of stock fields which come out-of-the-box with Sugar in order to configure inbound email accounts. The below definitions are the meanings for the available fields.

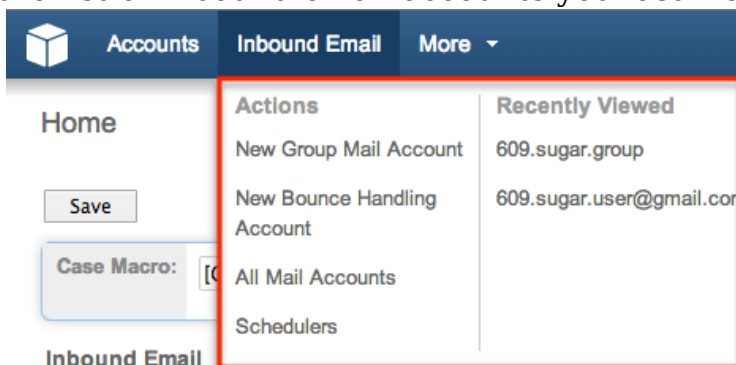
Field	Description
Allow users to send emails using the "From" Name and Address as the reply to address	Select this option if you want to enable users to use this account's From name and address as their Reply To address. Only available for Group Accounts and defaults to not checked.
Assign To Teams	The Sugar team(s) assigned to the email record. Note : Users will only be able to see emails in group accounts as allowed by their team membership.
Auto-Reply Template	Select an existing template, or click Create to create a new one to send an automated response notifying email senders that you received their email. Note : If both Auto-Reply and Case Reply templates are selected, Sugar will respond to the sender with the Case Reply template only.
Create Case from Email	Select this option to create cases automatically from inbound emails. Only available for Group Accounts and defaults to not checked. For more information on creating cases via email, the distribution method, and case auto-reply, please refer to the Creating Cases From Email section.
Distribution Method	Only available if Create Case from Email is checked for a Group Account and allows you to select Round-Robin or Least-Busy for assigning the new cases.
From Address	The email address any outgoing email will come from. Defaults to the email address from your user profile.
From Name	The name outgoing email will come from; for example, the name of your organization. Defaults to your first and last name from your user profile.
Import Emails Automatically	Select this option to create email

	records automatically in Sugar for all incoming emails. Only available for Group Accounts and defaults to checked.
Leave Messages On Server	Select this option to not removed emails from the server. Only available for Group Accounts and defaults to Yes.
Mail Server Address	The web address of the external email server from which emails will be imported in Sugar.
Mail Server Port	The communication port number used for connecting to the mail server.
Mail Server Protocol	The mail protocol used to communicate with the mail server. IMAP is the default selection and provides the best functionality with Sugar.
Monitored Folders	The folders in your external account that Sugar will monitor. Inbox is selected by default. To select one or more folders to monitor click "Select" and then pick the folders in your external account for Sugar to monitor.
Name	The name or designation of the account.
New Case Auto-Reply Template	Only available if Create Case from Email is checked for a Group Account and allows you to select or create an automated response template notifying email senders that a case has been created to resolve their issue. For more information on creating cases via email, the distribution method, and case auto-reply, please refer to the Creating Cases From Email section.
No Auto-Reply to this Domain	Enter the domain name to exclude a domain from receiving the automatic email response. It is common to specify your organization's domain to prevent auto-replies from being sent to your organization's members.
Number of Auto-responses	Set the maximum number of auto-responses to be sent to a unique email address during a period of 24

	hours.
Password	Enter the password associated with the entered email address or user name.
Reply-to Address	The email address that will receive any replies from your email. If left blank, replies will be sent to the From Address.
Reply-to Name	The name that will receive any replies from your email. If left blank, replies will be sent to the From Name.
Sent Folder	Select a folder from your external account to store any email being sent from that account through Sugar.
Status	The current status of the account (i.e. Active, Inactive).
Trash Folder	Select a folder from your external account to be designated as the trash folder. Sugar will place deleted emails into this folder on your external account.
Use SSL	Check this box to force the connection and communication between Sugar and the mail server to use a secure socket layer of encryption.
Username	Enter the email address or user name to connect to the SMTP server with.

Inbound Email Module Tab

The Inbound Email module tab is typically located on the navigation bar at the top of any Sugar screen after selecting "Inbound Email" from the admin screen. Click the tab to access the Inbound Email list view. You may also hover on the tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of inbound email accounts you last viewed in the module.



The Actions menu allows you to perform the following operations:

Menu Item	Description
New Group Mail Account	Opens the edit view layout to create a new Group Mail Account
New Bounce Handling Account	Opens the edit view layout to create a new Bounce Handling Account
All Mail Accounts	Opens the list view layout to display all inbound mail accounts
Schedulers	Opens the list view layout to search and display schedulers

Creating Inbound Email Records

There are various methods for creating inbound email accounts in Sugar including via Inbound Email module, Emails module, Campaigns module and duplication. The full edit view layout opens when creating the inbound account directly from the Inbound Email menu and includes all of the relevant fields for your organization's accounts.

For more information on how to create a personal inbound email account, please refer to the [Emails](#) documentation in the application guide.

For more information on how to create a bounce handling inbound email account via the Campaigns module, please refer to the [Campaigns](#) documentation in the application guide.

From the Inbound Email module tab you can create two kinds of Inbound Email Accounts:

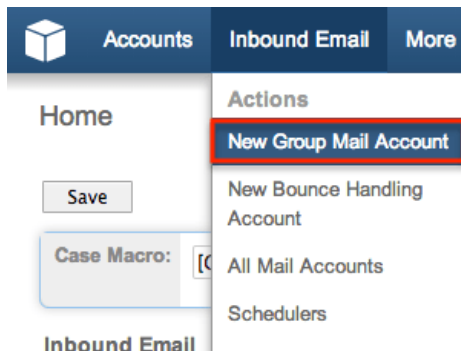
- **Group Mail Accounts** : Allows multiple users, such as team members, to view emails from an external mail account. When you receive emails that are addressed to your organization but not to any particular user, you can route it to a Group mail account such as support@example.com or sales@example.com. Users can subsequently distribute emails in the Group mail account to other team members.
 - Note: Group Mail Accounts will only import unread messages from the mail server.
- **Bounce Handling Mail Accounts** : Stores campaign emails that bounce back to you due to incorrect email addresses. You can create a bounce handling inbox separately for each campaign, or you can create one that is common to all campaigns. The system tags every bounced campaign email with a unique identifier that enables you to identify the campaign.

Creating Group Mail Accounts

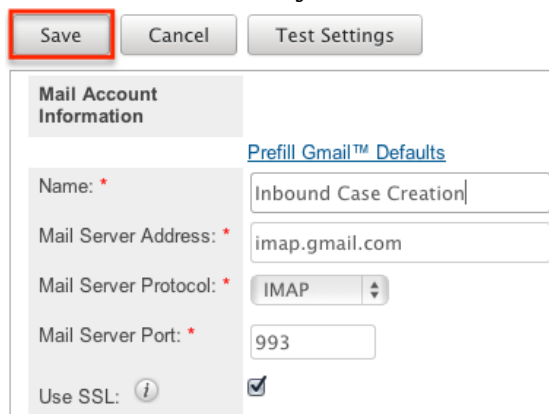
One of the most common methods of Group Mail Account creation is via the New Group Mail Account option in the Inbound Email module tab. This opens up the edit view layout which allows you to enter in all the relevant information for the group mail account. Please note that Group Mail Accounts will only import unread messages from the mail server.

Use the following steps to create a group mail account via the Inbound Email module:

1. Navigate to Admin > Inbound Email.
2. Hover on the Inbound Email module tab and select "New Group Mail Account".



3. Enter appropriate values for the [fields](#) in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving. Note : If your mail account is using Gmail, click "Prefill Gmail™ Defaults" to populate many fields with defaults to connect to Gmail.
4. Once the necessary information is entered, click "Save".

A screenshot of the 'Mail Account Information' form. At the top, there are three buttons: 'Save' (highlighted with a red box), 'Cancel', and 'Test Settings'. Below the buttons, there is a 'Prefill Gmail™ Defaults' link. The form fields are: 'Name: *' with the value 'Inbound Case Creation', 'Mail Server Address: *' with the value 'imap.gmail.com', 'Mail Server Protocol: *' with a dropdown menu set to 'IMAP', 'Mail Server Port: *' with the value '993', and 'Use SSL: *' with a checked checkbox and an information icon.

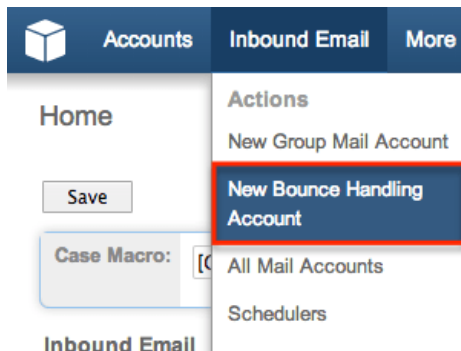
Optionally, click "Test Settings" to verify your entries.

Creating Bounce Handling Accounts

One of the most common methods of Bounce Handling Account creation is via the New Bounce Handling Account option in the Inbound Email module tab. This opens up the edit view layout which allows you to enter in all the relevant information for the bounce handling mail account.

Use the following steps to create a bounce handling account via the Inbound Email module:

1. Navigate to Admin > Inbound Email.
2. Hover on the Inbound Email module tab and select "New Group Mail Account".



3. Enter appropriate values for the [fields](#) in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving. Note : If your mail account is using Gmail, click "Prefill Gmail™ Defaults" to populate many fields with defaults to connect to Gmail.
4. Once the necessary information is entered, click "Save".

A screenshot of a form titled 'Mail Account Information'. At the top, there are three buttons: 'Save' (highlighted with a red box), 'Cancel', and 'Test Settings'. Below the buttons, there is a 'Prefill Gmail™ Defaults' link. The form contains several fields: 'Name: *' with the value 'Campaigns Bounce Account', 'Mail Server Address: *' with the value 'imap.gmail.com', 'Mail Server Protocol: *' with a dropdown menu set to 'IMAP', 'Mail Server Port: *' with the value '993', and 'Use SSL: *' with a checked checkbox and an information icon.

Optionally, click "Test Settings" to verify your entries.

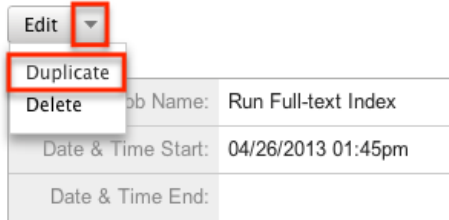
Creating Via Duplication

You can also create a new group mail or bounce handling account by duplicating an existing account record. The duplicate option is useful if the account you are creating has similar information to an existing account.

Use the following steps to create an account by duplicating an existing record:

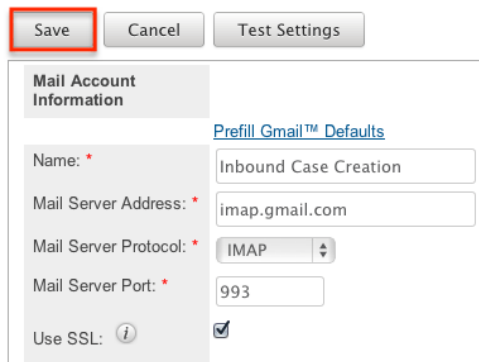
-
1. Navigate to an account record's detail view.
 2. Select "Duplicate".

Run Full-text Index ☆



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

609.sugar.group



The image shows the 'Mail Account Information' form. The 'Save' button is highlighted with a red box. The form includes the following fields: Name: * (Inbound Case Creation), Mail Server Address: * (imap.gmail.com), Mail Server Protocol: * (IMAP), Mail Server Port: * (993), and Use SSL: (checked). There is also a 'Cancel' button and a 'Test Settings' button.

Viewing Inbound Email Records

There are various options available for viewing inbound account records in Sugar including via Inbound Email list view, detail view, and Last Viewed menu.

Viewing Via List View

The Inbound Email list view displays all inbound account records. To access the list view, simply click the Inbound Email module tab. While list view shows key inbound account fields, you can click the account's name to open the record in detail view. For more information on viewing inbound accounts via list view, please refer to the [Inbound Email List View](#) section.

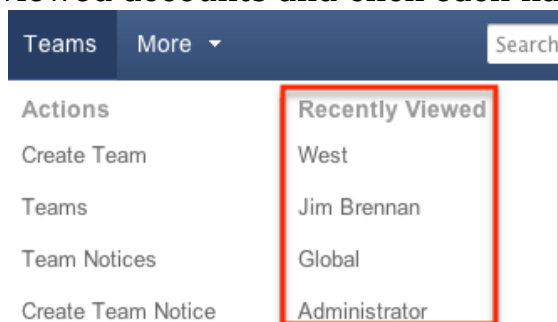
Viewing Via Detail View

The Inbound Email detail view displays thorough inbound account information including all fields. The detail view can be reached by clicking an account record's link from anywhere in the application including from the Inbound Email list view.

For more information on viewing inbound accounts via detail view, please refer to the [Inbound Email Detail View](#) section.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which inbound accounts you have recently viewed. Hover on the [Inbound Email module](#) tab to see a list of your most recently viewed accounts and click each name to open the account in detail view.



Inbound Email List View

The Inbound Email list view displays all inbound account records meeting the current search criteria and to which your user has access. You can view the basic details of each account within the field columns.

Modifying Case Macro

The Case Macro field determines what distinct string Sugar will use to match emails to the Cases module. The Case Macro is on the Inbound Email list view and displays the current case macro string. By default this string is set to [CASE:%1]. To customize it, you can change CASE to a different word, but you must preserve the rest of the string; for example, [TICKET NUMBER:%1].

Home

Case Macro: Set the macro which will be parsed and used to link imported email to a Case. Set this to any value, but preserve the "%1".

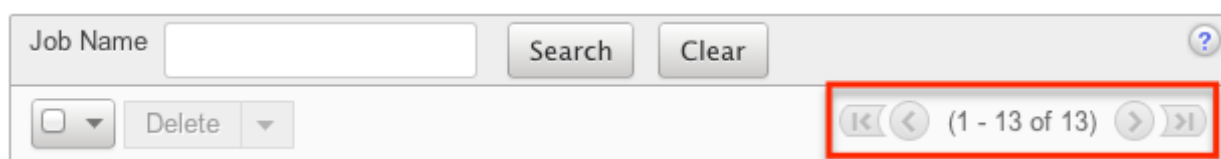
Click "Save" to preserve your changes.

Pagination

List view displays the current results broken into pages that you can scroll through

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

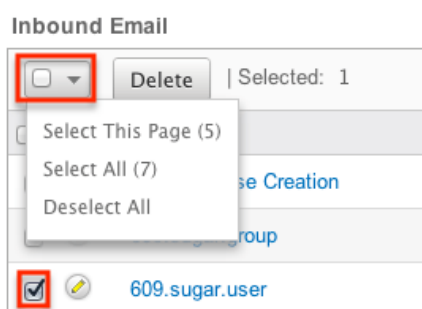
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.



Checkbox Selection

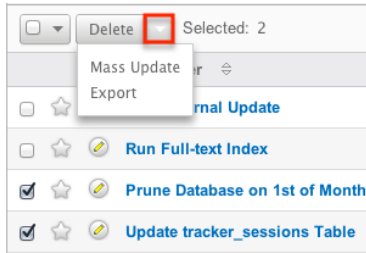
You can perform several actions on inbound account records directly from the list view by first selecting the desired records. To select individual inbound account records on the Inbound Email list view, mark the checkbox on the left of each row. To select or deselect multiple inbound account records on the list view, use the options in the checkbox dropdown menu:

- **Select This Page** : Selects all records shown on the current page of inbound account results.
- **Select All** : Selects all records across all pages of inbound account results.
- **Deselect All** : Deselects all records that are currently selected.



Action Buttons

The Actions menu to the right of the checkbox dropdown typically allows you to perform various actions on the currently selected records.



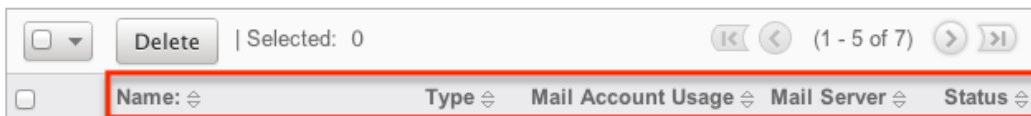
The only action available from the Inbound Email list view is the following operation:

Menu Item	Description
Delete	Delete one or more inbound accounts at a time

Column Sorting

List view provides the ability to sort all of the current results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time.

Inbound Email



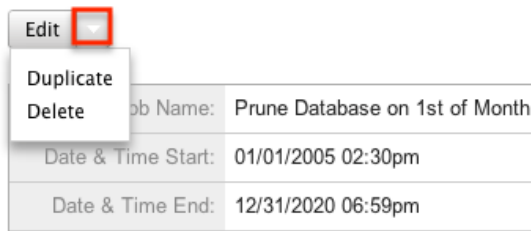
Inbound Email Detail View

The Inbound Email detail view displays thorough inbound account information including all inbound account fields which are grouped by default into the Mail Account Information and Advanced Setup panels. The detail view can be reached by clicking an inbound account record's link from anywhere in the application including from the Inbound Email list view.

Action Buttons

The Action Buttons on the top left of each inbound account's detail view allows you to perform various actions on the current record.

Prune Database on 1st of Month 



Job Name: Prune Database on 1st of Month
Date & Time Start: 01/01/2005 02:30pm
Date & Time End: 12/31/2020 06:59pm

The action buttons allow you to perform the following operations:

Menu Item	Description
Edit	Edit this inbound account.
Duplicate	Duplicate this inbound account.
Delete	Delete this inbound account.

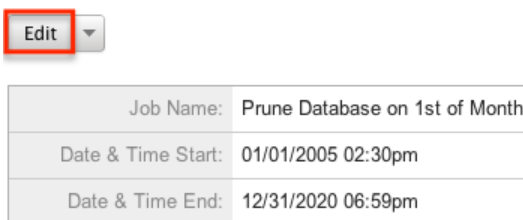
Editing Inbound Email Records

Inbound accounts may be edited at any time to update or add information to the record. You can make changes to existing inbound account records via the Inbound Email edit view. Edit view is available within the Inbound Email module and includes all of the Inbound Email fields you should need.

Editing Via Detail View

You can edit inbound accounts via the [detail view](#) by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve your changes.

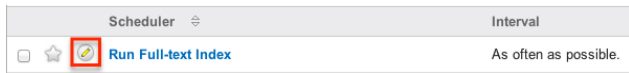
Prune Database on 1st of Month 



Job Name: Prune Database on 1st of Month
Date & Time Start: 01/01/2005 02:30pm
Date & Time End: 12/31/2020 06:59pm

Editing Via List View

You can edit inbound accounts via the [list view](#) by clicking the Pencil icon to the left of each inbound account's name. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve your changes.



Deleting Inbound Email Records

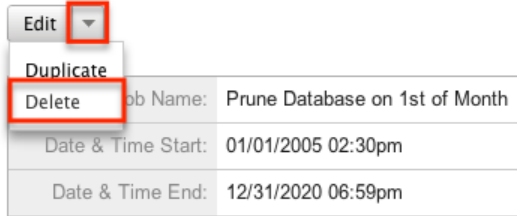
If an inbound account record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Inbound Email detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting inbound account records will not delete the email imported from this account.

Deleting Via Detail View

Use the following steps to delete an inbound account record via the detail view:

1. Navigate to an inbound account record's detail view.
2. Select "Delete".

Prune Database on 1st of Month

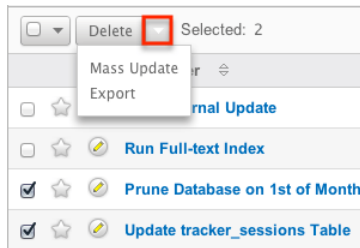


3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Mass Deleting Via List View

Use the following steps to delete one or more inbound account records via the list view:

1. Navigate to the Inbound Email list view by clicking the Inbound Email module tab.
2. Select the desired inbound account records individually or using the checkbox dropdown's options.
3. Choose "Delete".



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

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

Creating Cases From Email

To create a case via email, simply send an email to a group inbound email account that has the case creation option selected. The subject and description of the case is populated with the subject and body of the email respectively. The new case is assigned to the team defined in the inbound email account record and the case can be assigned to a specific user in that team based on two rules:

- Round-Robin : Sugar distributes cases evenly among all users within the team.
- Least-Busy : Sugar distributes cases to the least busy user within the team. Least busy is defined by the person with the least number of unread emails assigned to them.

Note : Case assignment is distributed to all members of the specified team, but excludes any inherited members of the team due to the "Reports To" structure. For more information on teams and the Reports To structure, please refer to the [Team Management](#) and [User Management](#) documentations in the Administration guide. Cases created from email are automatically related to contact and account records that match the email address in the From field of the email.

If a case auto-reply template is specified the sender of the email will receive an email based on the template selected. The response contains the system generated case number in the subject line of the email based off of the case macro. The body of the email for which the case was created displays below the template text. The case auto-reply ignores the "No Auto-Reply to this Domain" field if populated.

Note : If both Auto-Reply and Case Auto-Reply templates are selected, Sugar will respond to the sender with the Case Auto-Reply template only.

Email Queue

The Email Queue option in Admin is where Sugar administrators can monitor and perform actions on queued email. When sending a campaign the emails are not sent immediately, but are queued to be sent. Each queued email has a "Send On" date and time set by the campaign they are sent from. The scheduler "Run Nightly Mass Email Campaigns" takes the queued emails that are ready to be sent based on this date and time and sends them in batches. If an email fails to send from the queue for any reason it will be flagged as a send attempt and, by default, Sugar will not attempt to send that email for another 24 hours. Once Sugar reaches six failed attempts to send an email it will be deleted from the queue. In order to send a failed email sooner than the default 24 hours, you can perform a [mass update](#) to reset the In Process field. This section will cover how to use the email queue as well as the various actions and options available from within the email queue.

Viewing Via List View

The email queue list view displays all queued email records meeting the current search criteria. To access the list view, simply click the Email Queue link on the Admin page. List view shows key email fields including links to the Campaign, Recipient, and Marketing Message records. For more information on viewing queued email via list view, please refer to the [Email Queue List View](#) section.

Searching Queued Email

The email queue list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Email Queue list view below. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the [Search](#) documentation in the Application guide.

Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.

The buttons and checkboxes available in Basic Search panel have the following

functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.

Email Queue



Campaign My Items Search Clear [Advanced Search](#) ?

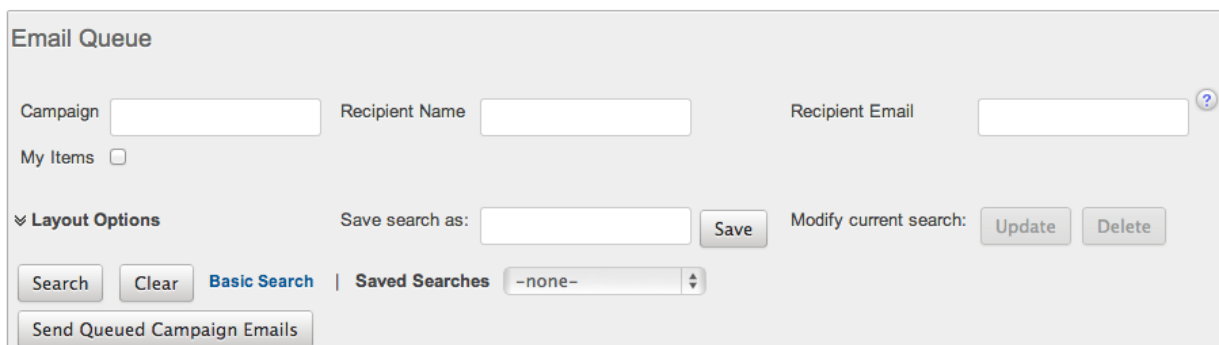
Once the search is complete, the relevant results will populate in the list view below the search panel. To see all queued email records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters.

Advanced Search

Advanced Search offers a more in-depth search experience than Basic Search including additional fields, layout options, and saved search capability. From the Advanced search panel, you can click "Basic Search" for simplified searching. The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the [Layout Options](#) section of the Search documentation in the Application guide.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the [Saved Search](#) section of the Search documentation in the Application guide.

Email Queue



Email Queue

Campaign Recipient Name Recipient Email ?

My Items

Layout Options Save search as: Save Modify current search: Update Delete

Search Clear **Basic Search** | Saved Searches

Send Queued Campaign Emails

When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you enter in a campaign name to search and a recipient name, Sugar will only return queued email records with matching both fields. Once the search completes, the relevant results will populate in the list view below the search panel. To see all queued email records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters.

Email Queue List View

The Email Queue list view displays all queued email records meeting the current search criteria and to which your user has access. You can view the basic details of each email within the field columns.

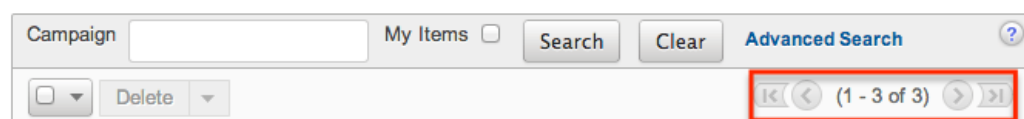
You have the option to change what fields are displayed in list view by configuring your layout options in the Advanced Search. For more information on configuring your list view, please refer to the [Layout Options](#) section of the Search documentation in the Application guide.

Pagination

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

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

Email Queue



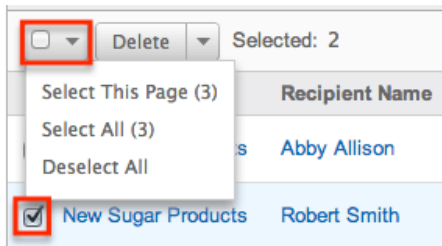
The screenshot shows the search interface for the Email Queue. At the top, there is a search bar with the text "Campaign" and a "My Items" checkbox. Below the search bar are buttons for "Search", "Clear", and "Advanced Search" (with a help icon). A "Delete" button is also visible. The pagination controls are highlighted with a red box and show "(1 - 3 of 3)" with navigation arrows.

Checkbox Selection

You can perform several actions on queued email records directly from the list view by first selecting the desired records. To select individual queued email

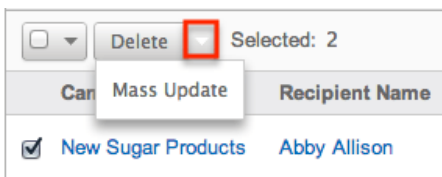
records on the Email Queue list view, mark the checkbox on the left of each row. To select or deselect multiple queued email records on the list view, use the options in the checkbox dropdown menu:

- **Select This Page** : Selects all records shown on the current page of results.
- **Select All** : Selects all records in the current search results across all pages of results.
- **Deselect All** : Deselects all records that are currently selected.



Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.



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

Menu Item	Description
Delete	Delete one or more queued emails at a time
Mass Update	Mass update one or more queued emails at a time

Column Sorting

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

guide.

<input type="checkbox"/>	Campaign	Recipient Name
<input type="checkbox"/>	New Sugar Products	Abby Allison

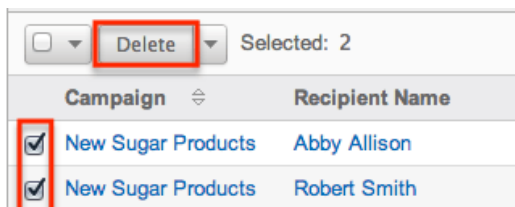
Deleting Queued Email

If a queued email is invalid or should no longer be sent, it may be deleted from the list view. The list view allows for mass deleting multiple records at once. Deleting queued emails will not delete the campaign or target, but will remove the instance of this email so it will not be sent.

Mass Deleting Via List View

Use the following steps to delete one or more queued email records via the list view:

1. Navigate to the Email Queue list view by clicking the Email Queue link on the Admin page.
2. Use the [Basic](#) or [Advanced Search](#) to find the queued email records you wish to delete.
3. Select the desired records individually or using the [checkbox dropdown's](#) options.
4. Choose "Delete" from the Actions menu.



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

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

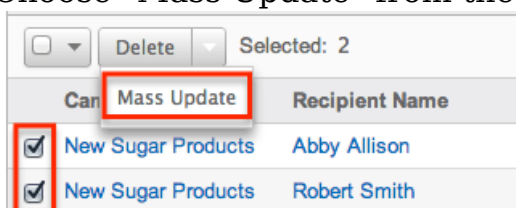
Mass Updating Queued Email

Mass Updating allows users to make the same change to multiple queued email records at once from the Email Queue list view. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. Due to the PHP memory limitations on the server, there may be

occasions when the application times out while mass updating a large number of queued email records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Use the following steps to mass update queued email records from the list view:

1. Navigate to the Email Queue list view by clicking the Email Queue link on the Admin page.
2. Use the list view's [Basic](#) or [Advanced Search](#) to find queued email you wish to modify.
3. Select the desired records individually or using the [checkbox dropdown's](#) options.
4. Choose "Mass Update" from the Actions menu.



5. Scroll to the Mass Update panel and set values for the fields you wish to alter.



Note : After an email has failed to send, setting In Process to "No" will flag the email to attempt to send again. Otherwise the email will not attempt to be sent again until 24 hours has passed. Optionally set the Send Date to configure when the email should be attempted again.

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

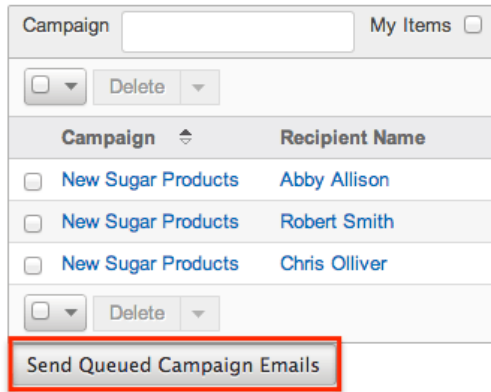
Sending Queued Email

Queued email will be automatically be sent out in batches by the "Run Nightly Mass Email Campaigns" scheduler. For more information on setting up and configuring scheduler, please refer to the [Schedulers](#) documentation in the Administration guide. Alternatively, you can manually send a batch of emails in the queue. The amount of queued email that will be sent is equal to the "Number of emails sent per batch" value specified in the [Campaign Email Settings](#) .

Use the following steps to manually send a batch of queued emails from the list view:

-
1. Navigate to the Email Queue list view by clicking the Email Queue link on the Admin page.
 2. Choose "Send Queued Campaign Emails" from below the list view.

Email Queue



3. Sugar will then send a batch of queued email whose Send On date and time is equal to now or in the past.

Note : If an email fails to send it will not be tried again for 24 hours.

Selecting specific records and searching for specific records will not determine which queued emails will be sent. This process will send a batch of emails that are queued to be sent in order by the Send On field. For more information on setting the batch amount, please refer to the [Campaign Email Settings](#) section.

Note : If your batch size is set high and you have a lot of queued email, this process can take a while to run through a single batch.

Last Modified: 09/26/2015 06:25pm

Developer Tools

Overview

The Developer Tools section of Sugar's Admin section contains many of the configuration menus that will help you to customize your instance to best suit your needs. Developer Tools is a combination of multiple menus that allow you to edit the look, feel, and functionality of your instance, including adding fields, changing layouts, adding automated processes, and creating entirely new modules.

Developer Tools contains the following menus:

Menu	Description
Studio	Modify fields, relationships, and layouts for existing modules
Module Builder	Create new modules to be deployed into this instance or exported to other Sugar instances
Module Loader	Upload and manage customization packages to your instance, such as additional modules or third-party integrations
Configure Module Menu Filters	Modify the header bar and subpanel filters to streamline which modules are displayed at a given time
Dropdown Editor	Manage dropdown lists to add new lists or edit existing lists
History Subpanel	Configure which modules display their related contacts' emails in their History subpanels
Rename Modules	Update the name of each module within Sugar
Display Modules and Subpanels	Hide unused modules from users across the application
Configure Navigation Bar Quick Create	Configure which modules show in the Quick Create shortcut on the module menu bar
Workflow Management	Manage automated processes in Sugar to optimize and streamline your company's business process

Studio

Studio allows you to configure the majority of the look and feel of the modules for your end users. Studio allows you to:

- Edit the names of fields, messages, and alerts
- Create new fields and edit the settings of existing ones
- Create and edit relationships to other modules
- Edit the different layouts for the module, such as the edit view, detail view, mobile views, etc.
- Edit the layout of how the subpanels of related modules appear on this

module

For more information on how to utilize Studio, please refer to the [Studio](#) section of the Administration Guide.

Module Builder

Module builder can be used to create entirely new modules for use with Sugar. For your convenience, the custom modules are based on templates such as Basic, Person, Company, etc. Modules can then be deployed to your instance so that users can utilize the new module in their daily process. In addition, modules can be exported or published and be then imported to other Sugar instances. For more information on using Module Builder, please refer to the [Module Builder](#) section of the Administration Guide.

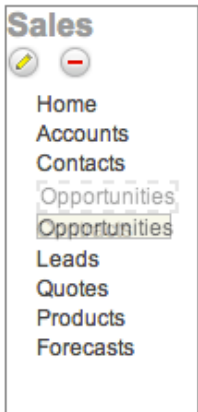
Module Loader

Module Loader is used to import deployable packages into Sugar to make changes to core files. Examples of module loadable packages could be Sugar custom modules created in Module Builder, language packs, third-party integrations, or any other type of file that would make changes to Sugar's core file system. Module Loader opens this window through Sugar's user interface to facilitate this process to the point where Zip files simply have to be uploaded and then installed. For more information on how to use Module Loader, please refer to the [Module Loader](#) section of the Administration guide.

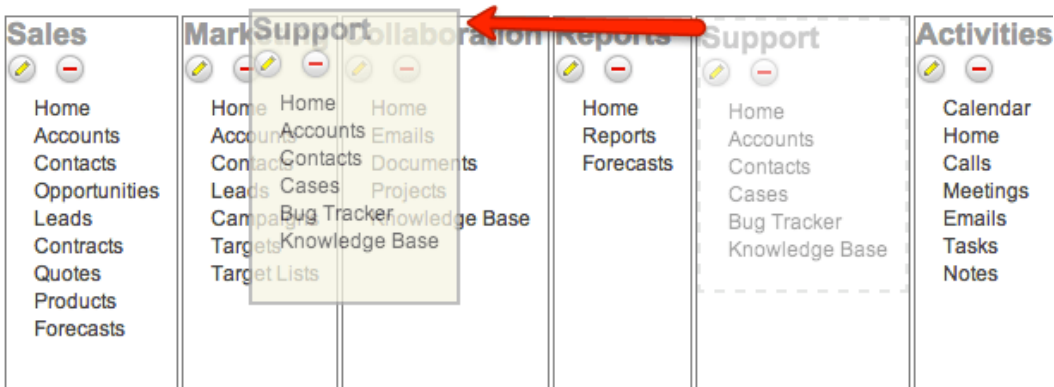
Configure Module Menu Filters

Module Menu Filters are used to group together like modules so that users can easily work within a group of modules instead of all modules at once. The filters can be used to group modules by user's functions, such as sales, marketing, or support. Modules are allowed to be added to multiple filters, and there is not a limit on the amount of filters that can contain a specific module.

Modules are easily configured within this page using drag and drop functionality. You can move modules around by clicking the module and dragging it over to where you would like it placed.



The same can also be done for the filters to reorder how they display.



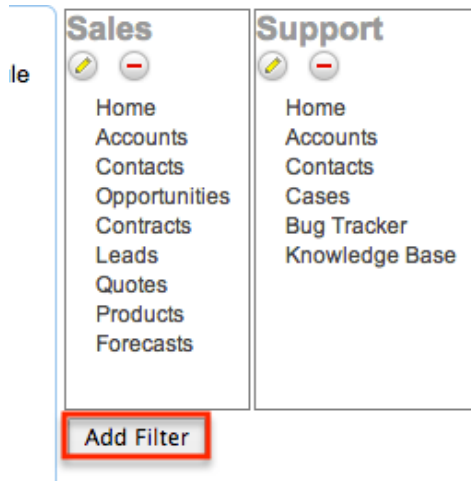
Note: Users have the ability to enable or disable grouped modules from their [User Preferences](#) page.

Configuring New Groups

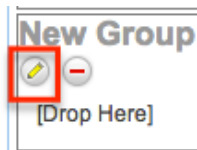
Groups can be added to your module filters to make groups to better fit your user's functions and usage of Sugar. You can create as many groups as needed, as there is no limit on the amount of groups in your instance. Each group will need at least one module to show as a module filter in Sugar.

To add a new group:

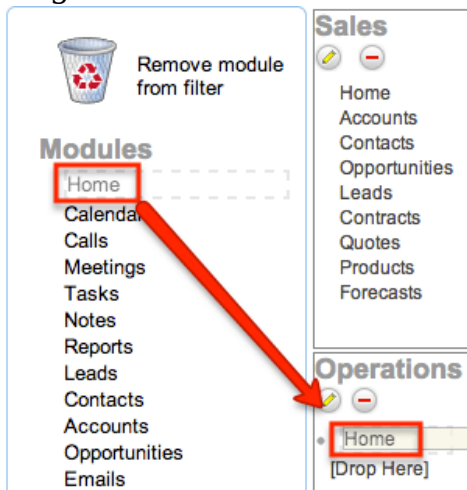
1. Navigate to Admin > Configure Module Menu Filters
2. Underneath any existing filters, click "Add Filter"



3. Click the edit pencil to change the new filter group's name



4. Drag module names from the module list on the left to your new filter box



5. After adding all of the necessary modules, click "Save and Deploy" at the top of the screen

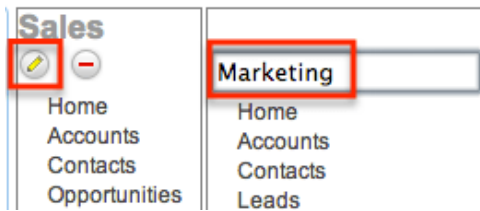
Editing Existing Groups

Edits to module groups can be made at any time and they will be pushed to all users upon save. The edits will affect all users that use the module group or groups that are being edited. After making any changes, the "Save and Deploy" button must be clicked to finalize the changes.

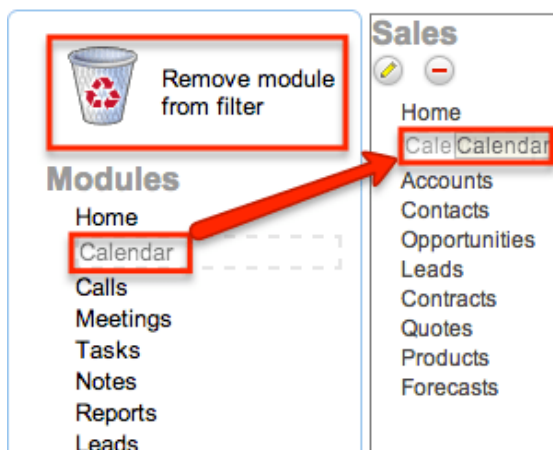
Three types of changes can be made to a module group through the Admin menu:

- Clicking the edit pencil of the group's box can change the name of the group.

Clicking the pencil will change the group's current name to a text box where you can enter the new or updated name of the group.



- You can add modules to the group by dragging them from the Module List on the left into the filter list that you are updating. Modules can also be removed from your module list by dragging them to the Recycling Bin in the Module List on the left.



- Unused or unwanted filters can be deleted by clicking the delete button on the group's box. This will remove the modules from the box and cross out the filter's name. This filter will no longer appear for any users and this will be removed after deploying your changes. Deleting a filter group cannot be undone.

Dropdown Editor

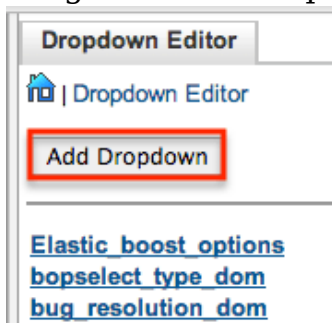
Dropdown lists are often created for use with a specific field through [Studio](#), however the lists are able to be added to multiple fields and utilized across multiple modules. As dropdown lists are not module specific, they are stored and managed through the Dropdown Editor. The Dropdown Editor allows you to create lists that will later be used in fields in Studio and edit existing lists in a convenient location. Dropdown lists can be used with dropdown, multiselect, and radio type fields.

Note: Some dropdown lists have specific menus in Admin to control the dropdown lists. These include lists for the [Forecasting](#), [Bug Tracker](#), [Contracts](#), and [Products and Quotes](#) modules. Please refer to the Administration guide's sections for those modules for more information on the fields and how they can be edited.

Add Dropdown List

Dropdown lists can be created at any time and later be added to a dropdown type field via [Studio](#). When creating a list, please keep in mind that this list is not module specific, so be sure to properly name your list and any dropdown options to avoid any future confusion. Lists can be added using the following process:

1. Navigate to Admin > Dropdown Editor.
2. Click "Add Dropdown" at the top of the list of existing dropdown lists to navigate to the dropdown creation screen.



3. Give your list a distinctive name as to ensure that you are able to identify it later when adding it to dropdown, multiselect, and radio fields in Studio (e.g. "account_manager_list" versus "ams").
Note: The name field must contain either letters or numbers, without any special characters except for an underscore.
4. To create the items that will appear on your dropdown list, you will need to fill in an "Item Name" and a "Display Label". The item name is the name of the list, as it will be read by Sugar on the back-end of the system. This field must contain either letters or numbers, without any special characters except for an underscore or a period. The display label is a text field that defines what users will see when using Sugar. This field does not have any character restrictions. Click "Add" when you have these two fields properly populated.

List Items:

Item Name[Display Label]

•

Item Name:

Display Label:

5. After your list has all of the entries that you would like to add, you can click one of the two sort options to rearrange the values in your list, if necessary. Lists can be sorted alphabetically ascending or descending, based on the Display Label. You can also sort the lists manually to your liking by dragging and dropping options on top of one another.

Item Name: Display Label:

- Click "Save" at the top of the screen to complete your list. You will be returned to the list of the dropdown lists after saving. Click "Cancel" to stop the save of this new list.

Dropdown Editor Edit Dropdown X

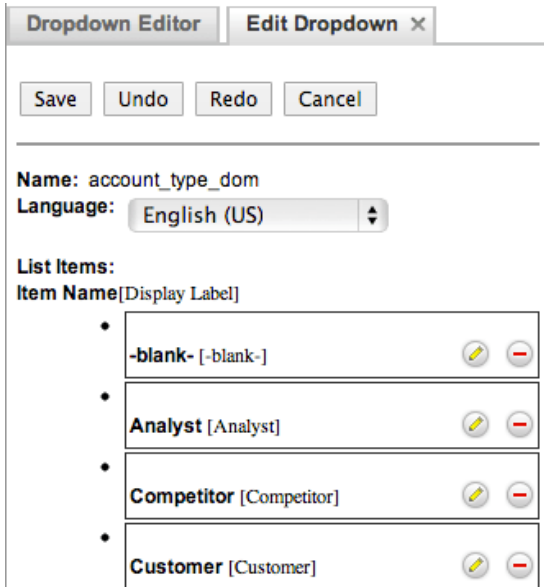
Name: account_manager_list

Viewing Dropdown Lists

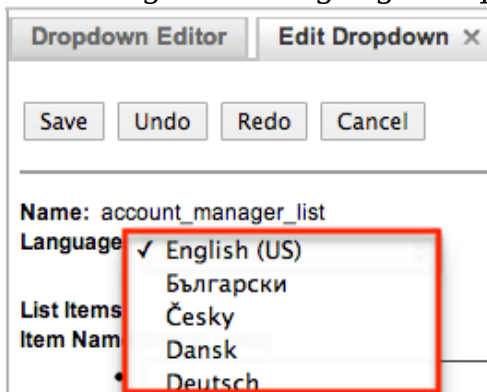
When first navigating to the Dropdown Editor, you will see the lists laid out in two groups. One, on the left, will have a list of all of the dropdown lists, in alphabetical order. You can scroll through this list to see your dropdown lists in alphabetical order. This list will be available as you navigate through the Dropdown Editor so that you can easily switch from one list to another when viewing lists in detail. The center of the page shows a broader version of the same list to allow you to see more lists at a time if you are not sure of the list's name for which you are searching.

The screenshot shows the 'Dropdown Editor' interface. On the left, a sidebar titled 'Dropdowns' contains a list of dropdown names: Elastic_boost_options, account_manager_list, account_type_dom, activity_dom, bopselect_type_dom, bselect_type_dom, bug_priority_dom, bug_resolution_dom, and bug_status_dom. The main area is titled 'Dropdown Editor' and contains an 'Add Dropdown' button. Below the button, two columns of dropdown names are displayed as blue underlined links: Elastic boost options, activity dom, bug priority dom, bug type dom, campaign status dom, and campainglog target type dom in the first column; and account manager list, bopselect type dom, bug resolution dom, call direction dom, campaign type dom, and case priority dom in the second column.

Once you find the dropdown list you are looking for, click on the list's name to open the view and edit screen. When viewing a dropdown list, you will see all of the options laid out in the order that they appear on the dropdown list when viewing it through the user interface.



If your organization uses Sugar in languages other than English, Sugar can display translated dropdown lists for each language used. For example, Sugar will display French dropdown items when a user is logged into Sugar in French. You must provide the translations for each language by specifying display labels for each dropdown item. First, finalize your list's items by [adding or removing items](#) since the item names (a.k.a. database values) and order of items will be consistent across all languages. Choose the desired language in the Language dropdown above the list. Then, click the pencil icon for each item and enter a translated display label. When all labels have been translated, click "Save" to preserve your changes. After saving, the list will automatically be displayed in English, but you can change the Language dropdown again to check your labels.



Editing Dropdown Lists

Editing a dropdown list can be easily done while viewing the list. The list can be rearranged, values can be added and removed, or the label of a value can be edited. The name of the list cannot be changed once created. Dropdown lists can also not be deleted since they can span multiple modules and therefore you may be affecting a dropdown field you do not intend to affect.

Note: After making any type of changes to the list, you will have to click "Save and Deploy" for them to take effect.

To rearrange a list, you can click one of the two sort options at the bottom of the page. Lists can be sorted alphabetically ascending or descending, based on the Display Label. You can also sort the lists manually to your liking by dragging and dropping options on top of one another.

Item Name: **Display Label:**

To add a value to your dropdown list, you will need to fill in an "Item Name" and a "Display Label" below the list of existing values. The item name is the name of the list, as it will be read by Sugar on the back-end of the system. This field must contain either letters or numbers, without any special characters except for an underscore or a period. The display label is a text field that defines what users will see when using Sugar. This field does not have any character restrictions. Click "Add" when you have these two fields properly populated.

List Items:
Item Name[Display Label]

-

Item Name: **Display Label:**

To remove a value from the list, you will first need to find the value on the list of available options. At the end of the row, there is a Delete button. Clicking this button will strike through the affected dropdown value. After saving the list, the value will be gone.

List Items:
Item Name[Display Label]


-
-

The Item Name of a dropdown value cannot be edited, but you are able to update the Display Label through the Dropdown Editor. To update this, you will first need to find the value on the list of available options. At the end of the row, there is an

Edit button. Clicking this button will turn the value's Display Label into an editable text box. You can enter a new label into this field and click anywhere on the page to close the box.

List Items:

Item Name[Display Label]

- | | | | |
|----------|------------------------------------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| w_westin | <input type="text" value="Will Westin"/> |  |  |
|----------|------------------------------------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
- | | | | |
|---------|----------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| j_kelly | [Joseph Kelly] |  |  |
|---------|----------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|

Editing Opportunity Sales Stages

The [Opportunities](#) module contains two fields that function unlike other fields in Sugar. When the Sales Stage dropdown field is updated, the Probability percentage of the opportunity is subsequently updated. This is a unique function to the Opportunities module and therefore, although the Sales Stage dropdown list, "sales_stage_dom", appears standard, additional changes must be made when updating it to ensure this relationship between the two fields remains in tact.

Included in the Dropdown Editor, there is a corresponding field to sales_stage_dom called "sales_probability_dom". The two fields include the same Item Name for all values. The Display Label for each is different though. When a sales stage is changed, the corresponding value on the probability dropdown list is populated in the Probability field in the module. Therefore, when making changes to the sales_stage_dom list, a corresponding entry must be updated in the sales_probability_dom list. This is shown on the sales_stage_dom list:

- | | |
|------------|--------------|
| Closed Won | [Closed Won] |
|------------|--------------|
- | | |
|-------------|---------------|
| Closed Lost | [Closed Lost] |
|-------------|---------------|
- | | |
|-----------------|-------------------|
| Closed_Deferred | [Closed Deferred] |
|-----------------|-------------------|

Item Name:

and on the sales_probability_dom list:

- Closed Won [100]
- Closed Lost [0]
- **Closed_Deferred [0]**

Item Name:

Note: Similar logic to this relationship between the fields can be built using Sugar Logic, available in [Studio](#).

Editing Time Intervals

The "After Time Elapsed" workflow triggers after a specified period of time has elapsed from when a record save occurs in Sugar. For more information on "After Time Elapsed" workflows, please refer to the [Workflow Management](#) documentation. When creating the conditions for the workflow, you have the option to specify the time interval (e.g. 0 hours, 4 hours, 1 day, 1 week, etc.) used by the system to execute the workflow. The available time interval values can easily be modified via the Dropdown Editor.

The Dropdown Editor contains the "tselect_time_dom" list, which allows administrators to configure the time intervals used for time elapsed workflows. To add new time intervals to the dropdown list, simply enter the "Item Name" and "Display Label", keeping in mind that the item name must display the number of seconds corresponding to the new time interval. The display label value should have the time as it relates to minutes, hours, days, etc. For example, if you are adding 2 hours to the time interval list, the item name value will be "7200" and the display label will show "2 hours".

Name: tselect_type_dom

Language: English (US)

List Items:

Item Name[Display Label]

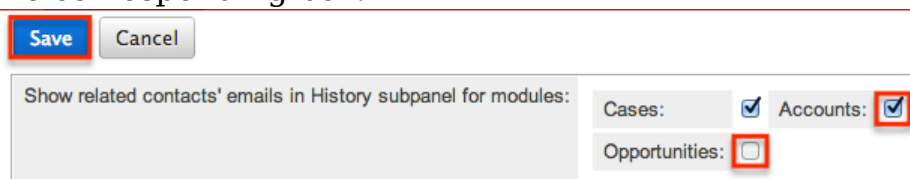
- 0 [0 hours]
- **7200 [2 hours]**
- 14440 [4 hours]

History Subpanel

By default, the History subpanel of account record will include emails associated with any of the account's related contacts. This functionality provides a fuller view of the interactions related to the current account record. The same functionality is also available on the Cases and Opportunities modules with it being enabled for cases by default in addition the Accounts module. The History Subpanel administration section allows administrators to enable or disable the inclusion of related contact records' emails for the Accounts, Cases, and Opportunities modules.

To enable or disable a module to include related contacts' emails in its History subpanel, follow these steps:

1. Navigate to Admin > History Subpanel.
2. To enable a module to include related contacts' emails in its History subpanel, click to check the corresponding box. To disable a module, click to uncheck the corresponding box.



Save Cancel

Show related contacts' emails in History subpanel for modules:

Cases: Accounts:

Opportunities:

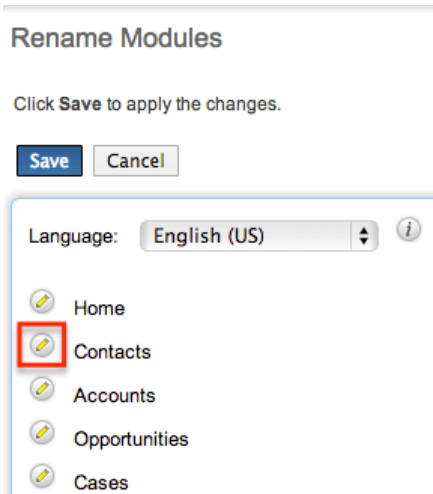
3. Click Save.

Rename Modules

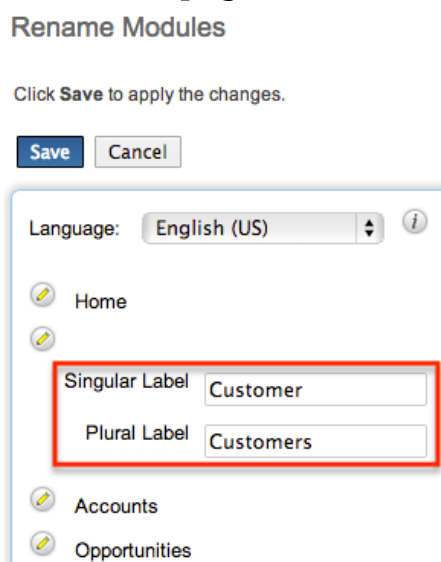
Depending on your business needs, the default module names, such as Contacts or Accounts, may not be the way that your organization addresses your various business components. In this situation, you can use the Rename Modules menu to update the name. When editing a name, you are given the option to update both a singular and a plural version of the word. This change will be reflected across Sugar so that every use of the given module name is updated to your preference, seamlessly to all users. This change can also be performed for any language in Sugar using the language dropdown list at the top of the screen.

To rename a module, follow these steps:

1. Navigate to Admin > Rename Modules
2. Locate the module you would like to change and click the edit pencil to the left of the module's name



3. Enter in a new singular and plural name for the module, then click anywhere else on the page to close the text boxes



4. Click "Save" to deploy your changes across your instance

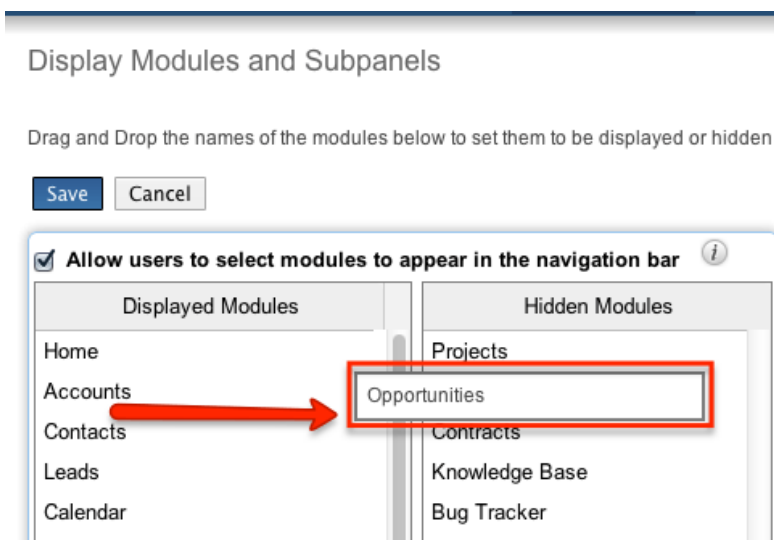
Display Modules and Subpanels

Not every company that uses Sugar will find the need to use every module that is included. In addition, not every module is enabled for use when Sugar is initially installed. For these reasons, you can choose to enable and disable modules using the Display Modules and Subpanels menu. This menu will control what modules appear in the module tab header at the top of all user's screens, and also what subpanels will be available across relevant modules when viewing detail views.

When you hide a module, it is not visible to users upon logging into Sugar. However, if the hidden module is related to a module that is visible to users, it displays as a subpanel in the detail view of the related module. Therefore, users can still access related records of the hidden module from the detail view of the

related module. Hidden modules are also available to users through the Reports module. When you hide a subpanel, users cannot view related records from the Detail View of a related module.

When opening the Display Modules and Subpanels page, you will see two sections, each with a "displayed" and "hidden" column. The top section controls which modules are displayed in the module tabs in the header. The lower section controls which subpanels are available throughout Sugar. To move an option from one column to the other, simply drag and drop the module where you would like it placed. After making the necessary changes, click "Save" at the top of the page to deploy your changes or "Cancel" to revert back to your previous settings.



Users have the option to selectively hide and display modules via the [User Profile](#) . The modules that they have access to display are the modules shown in the Displayed Modules column of the Display Modules and Subpanels menu. To disable the ability of users to make these changes on their own, toggle the "Allow users to select modules to appear in the navigation bar" checkbox above the displayed and hidden modules columns.

If you would like to limit specific users from being able to access modules, but would like the module to be available to other users, leave the module enabled on this screen and follow the information in [Role Management](#) to selectively disable modules to users.

Configure Navigation Bar Quick Create

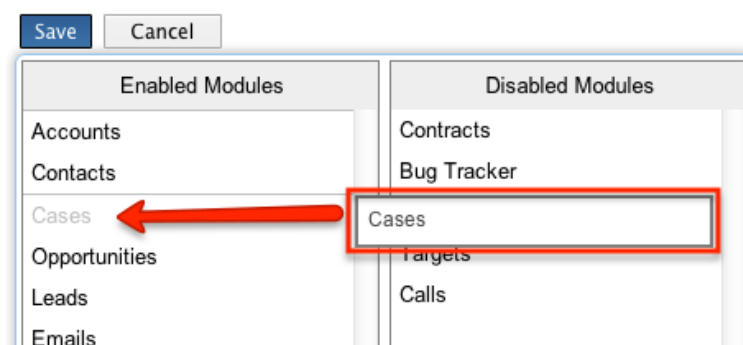
In the top right of the navigation bar on all Sugar screens is a dropdown for the Quick Create Menu. This menu allows you to quickly and easily create records for given modules from any Sugar screen. This is configured in the Configure Navigation Bar Quick Create menu in Admin.

When opening the Configure Navigation Bar Quick Create page, you will see a "displayed" and "hidden" column, where the displayed modules will show on the quick create menu in the given order. To move a module from one column to the other, simply drag and drop the module where you would like it placed. After making the necessary changes, click "Save" at the top of the page to deploy your changes or "Cancel" to revert back to your previous settings.

Note: The menu can display a maximum of 10 modules at one time.

Configure Navigation Bar Quick Create

Choose which modules for which users can quickly create records using the Plus ic



Workflow Management

Workflow Management gives you the opportunity to configure and manages automatic processes in Sugar to help your users be more efficient in their daily work. Workflows let you set cause and effect type processes where you can set a specific condition or conditions to be met which will trigger either updates to Sugar records, automated email messages to be sent out, or both. Workflows can be triggered either after a given amount of time from when an action takes place or immediately when something is changed on a Sugar record.

For more information on workflows, please review the [Workflow Management](#) documentation.

Last Modified: 10/22/2015 01:44pm

Studio

Overview

Studio enables administrators to customize stock or custom modules by modifying

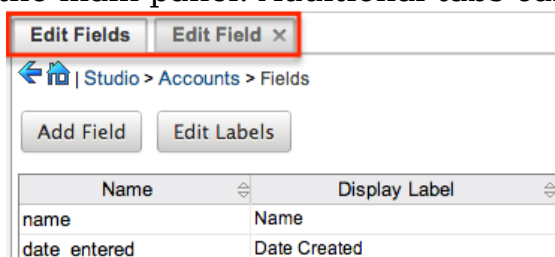
fields, page layouts, and more. This allows Sugar to be modified to ideally fit your organizations needs and terminology. Studio is available to only administrative users and users with a Developer-level role on one or more modules. These users can access the feature by going to Admin > Studio. This documentation will cover how to use Studio as well as the various actions and options available from within Studio.

Navigation

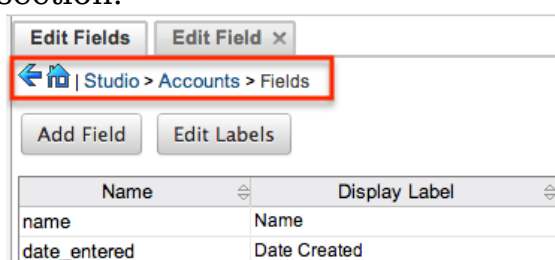
Studio's navigation is different than other modules within Sugar. Studio is divided into three main sections which consist of the main panel, modules panel, and footer.

Main Panel

The main panel in Studio is where selected information will be displayed and editable. When selecting items throughout studio, they will open inside tabs within the main panel. Additional tabs can be closed by clicking the "X" in the tab.



The main panel also includes a breadcrumb bar showing where in Studio you currently are. Select any level in the breadcrumb bar to navigate instantly to that section.

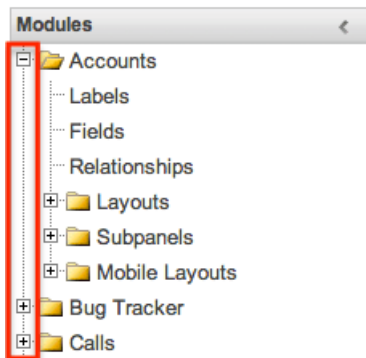


You may also click the Left arrow to go back one page, or the Home icon to navigate to the homepage of the Developer Tools.

Modules Panel

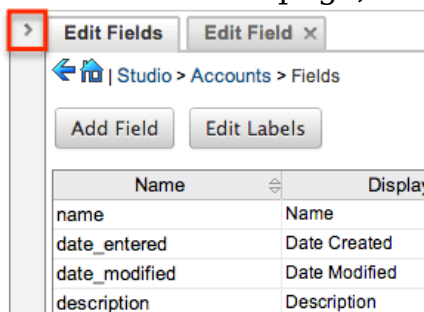
The modules panel is located on the left side of Studio and displays a list of existing stock and custom modules that are editable through Studio. The associated fields, labels, layouts, and subpanels for each module are grouped

within the module. Click the plus sign (+) preceding the module name to expand the module to see the associated items.



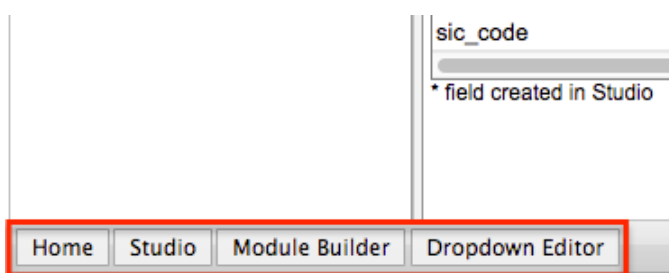
Select an item in the modules panel to load it into the main panel.

If you do not see the modules panel, it may be collapsed. Locate the gray bar on the left side of the page, and click the right arrow to expand the modules panel.



Footer

The footer is located at the bottom left of Studio and displays buttons which enable you to navigate to the different areas (e.g. Dropdown Editor) of Developer Tools.



The options in the footer allow you to navigate to the following locations:

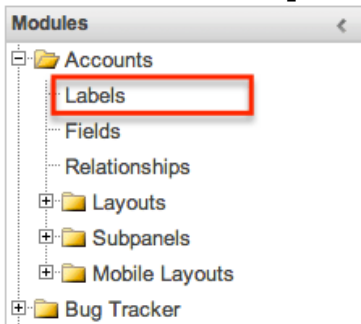
Menu Item	Description
Home	Navigates to the home page of the Developer Tools
Studio	Navigates to the home page of Studio
Module Builder	Opens Module Builder to create or edit modules

[Dropdown Editor](#)

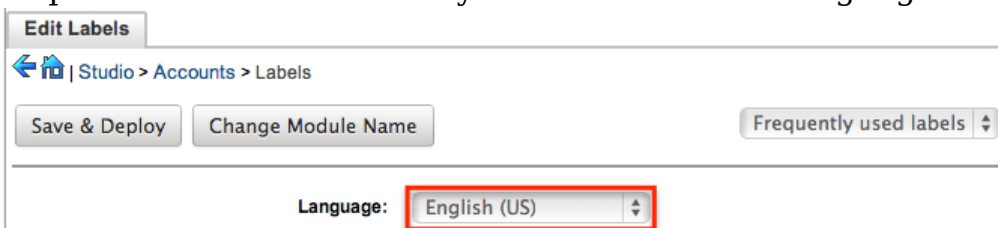
Opens the Dropdown Editor to modify dropdown options

Modifying Labels

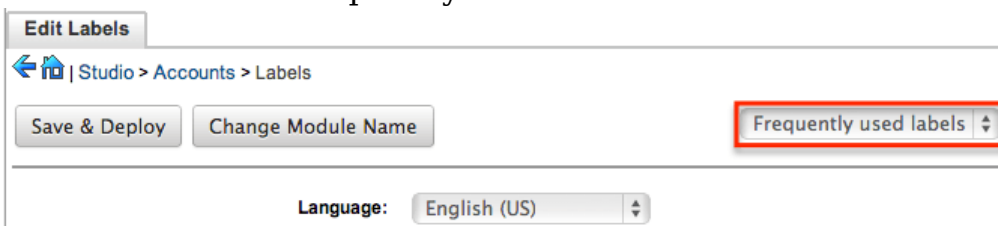
Labels are used throughout Sugar for items like buttons, field headers, subpanel titles, error messages, and more. To modify the labels for a module, select "Labels" from the modules panel under the desired module.



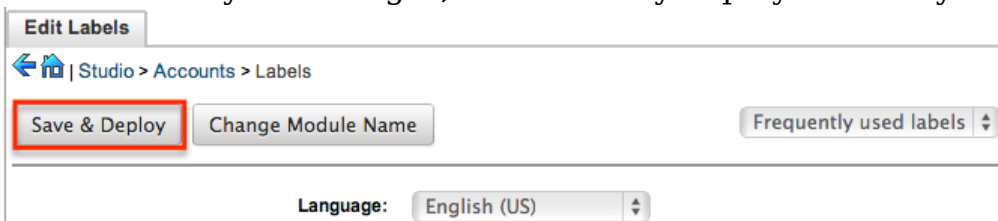
The Edit Labels tab will open up in the main panel. Here you can specify labels for all language packs currently installed. Select the desired language from the dropdown to view and modify the labels for that language.



If the label you are looking to change cannot be found, change the filter dropdown from the default "Frequently used labels" to "All labels".



Modify the labels for the selected language and "Save and Deploy" when complete. This will save your changes, and instantly deploy them to your instance of Sugar.



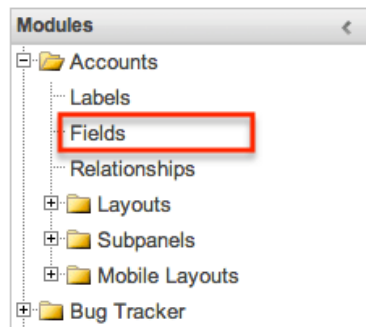
To change the name of a module, select "Change Module Name".



For more information on how to rename modules, please refer to the [Rename Modules](#) section of the Developer Tools documentation in the Administration guide.

Fields

The fields section in Studio allows administrators to create new fields for a stock or custom module as well as change properties on existing fields. To access the fields section in studio, select "Fields" from the modules panel under the desired module.



The Edit Fields tab will open up in the main panel.

Field Types

Sugar comes with many different types of fields to cover a variety of abilities. Each data type has certain options and properties to configure. The following fields are available to be added to modules in Studio:

Data Type	Description
Address	Creates fields for street, city, postal code, state, and country. Note: Custom address fields cannot be grouped together like the stock address fields.
Checkbox	Creates a checkbox for data fields with a Yes/No action.
Currency	Creates a field to enter a currency

	value. The system automatically creates a dropdown of the currency type if the field does not already exist in that module.
Date	Creates a field to enter a date. Includes a button for a calendar popup.
DateTime	Creates a field to enter the date and time. Includes a button for a calendar popup as well as dropdowns for the time.
Decimal	Creates a field to hold a number rounded to a specified decimal precision. Sugar stores the exact representation of the number in the database (e.g. For a precision of 2: 1.236 is stored as 1.24).
DropDown	Creates a field that you can associate with a dropdown list of values.
Encrypt	Creates a field for sensitive information, such as social security numbers, whose value is to be encrypted in the Sugar database. The value is encrypted in the database but is visible in the user interface to users.
Float	Creates a field to hold a number rounded to a specified decimal precision. Sugar stores the value differently based on the database platform Sugar is running on.
HTML	Creates static HTML-formatted text to display in record views.
IFrame	Creates a field to store or generate a URL to display an iFrame in record views.
Image	Creates an image field to upload an image to display on a record.
Integer	Creates a field to specify positive or negative numbers with no decimal places.
MultiSelect	Creates a dropdown list of values where multiple values can be selected.

Flex Relate	<p>Creates a dropdown list from which you can relate a single record from a variety of modules.</p> <p>Note: Only one Flex Relate field is allowed per module. Out of the box, the Flex Relate option is not available for the Accounts, Calls, Contracts, Meetings, Notes, and Tasks modules.</p>
Phone	Creates a field to enter a phone number.
Radio	Creates a radio button for a user to select one value from a dropdown list.
Relate	<p>Creates a field to associate a record with another module's record as a one-way relationship. You can add multiple Relate fields to a module.</p> <p>Note: Relate fields and custom relationships are independent of each other. Changes made to either one are not reflected in the other. Relate fields can be added to a report, but any data on the related record cannot be accessed in the report. To access related record data in a report you will need to create a custom relationship.</p>
TextArea	Creates a large field for multiple lines of text.
TextField	Creates a field for a single line of text.
URL	Creates a field to store or generate a URL and displays as a link.


Field Options

Fields provide ways to store different data types in Sugar. While many fields come with Sugar by default, there can be instances where your organization needs to store additional data.

When creating or modifying fields through Studio, there are some properties that exist across all field types, and there are some that are unique to only a few types.

The following properties and options are available for fields in Studio:

- **Audit** : Select this checkbox to log when this field is changed per record. Users can view the audit via "View Change Log" from the detail view. The Audit option is available for all data type fields.
- **Border** : Select this checkbox to add a border around the image for this field. The Border option is only available for Image data type fields.
- **Calculated Value** : Select this checkbox to designate this field as a calculated field. This opens up the Formula option and disables the Default Value and Importable options. For more information regarding entering a formula for a calculated value, please refer to the Formula option listed in this section.

Calculated Value: 

Formula:

The result of the formula will be entered into the field for any new or modified records. When selecting this option, the field value cannot be modified by users.

The Calculated Value option is only available for the following data type fields:

Checkbox	Currency
Date	Datetime
Decimal	Encrypt
Float	Integer
Phone	TextArea
TextField	

Columns : Enter the number of columns to specify the width of a TextArea data type field.

The Columns option is only available for TextArea data type fields.

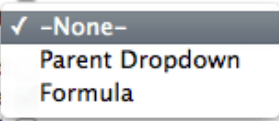
Comment Text : Enter comments or documentation about the field. Only viewable through Studio.

The Comment Text option is available for all data type fields except Flex Relate.

Default Value : Specify or select a default value for this field when a record is created. Default values for the record are populated by default on the edit view layout, but can be modified by users.

The Default Value option is available for all data type fields except HTML, Image, Flex Relate, and Relate.

Dependent : Select this option to designate this field as being dependent on a formula or a parent dropdown. For DropDown data type fields you can select "Parent Dropdown" or "Formula" for the dependency.


Dependent 

Required Field

Reportable

Audit

Selecting "Parent Dropdown" will open the Parent Dropdown option listed below. Selecting "Formula" will open the Visible If option. For other field data types, select the Dependent checkbox to open the Visible If option. For more information regarding entering a formula to make a dependent field visible, please refer to the Visible If option listed in this section.

Dependent: 

Visible If:

The Dependent option is available for all data type fields except Address. Disable Format : Select this checkbox to disable number formatting such as the thousands separator.

The Disable Format option is only available for Integer data type fields. Display Label : Enter a value to display as the field label and header in layouts. This value is also modifiable in the modules panel under [Labels](#) . Defaults to the Field Name entered.

The Display Label option is available for all data type fields except Flex Relate. Flex Relate uses the Label Value option.

Drop Down List : Select a list of values to use for the field. Only values in the list will be available to be selected for the field. Click "Edit" to change the values for the currently selected list, or click "Add" to create a new list.

Drop Down List: 

The Drop Down List option is only available for the following data type fields:

DropDown	MultiSelect
Radio	

For more information on editing dropdown values via the Dropdown Editor, please refer to the [Editing Dropdown Lists](#) section of the Developer Tools documentation in the Administration guide.

Duplicate Merge : Select one of the following options to determine the field's functionality when records are being merged:

- Disabled : Selected by default. The field will not appear in the Merge Duplicates feature, and will not be available to use for the filter conditions in the Find Duplicates feature.
- Enabled : The field will appear in the Merge Duplicates feature, but will not be available to use for the filter conditions in the Find Duplicates feature.
- In Filter : The field will appear in the Merge Duplicates feature, and will also be available in the Find Duplicates feature.
- Default Selected Filter : The field will be used for a filter condition by default in the Find Duplicates page, and will also appear in the Merge Duplicates feature.
- Filter Only : The field will not appear in the Merge Duplicates feature, but will be available in the Find Duplicates feature.

The Duplicate Merge option is available for all data type fields except Image.

Enable Range Search : Select this checkbox to allow range searches to be performed on this field. For more information on how to use ranged searches, please refer to the [Advanced Search](#) section of the Search documentation in the Application guide.

The Enable Range Search option is only available for the following data type fields:

Currency	Date
Datetime	Float
Integer	

Field Name : Enter in the name of the field being created. Once a field has been created the field name cannot be changed. Field names can contain only alphanumeric characters as well as the underscore character. Custom fields added through Studio are automatically appended with an "_c" to ensure the field does not conflict with a current or future stock field.


The Field Name option is required for all data type fields.

Full Text Searchable : Select a boost level for indexing this field for Full Text Searching. Disabled indicates the field will not be indexed by the Full Text engine. Fields with a higher boost level will be given greater weight when a search is performed, making the matching values appear higher in the search results. If you change the boost level for a field from one level to another, be sure to perform a system index deleting the existing data to apply the change. For more information regarding Full Text Search, please refer to the [Search](#) documentation in the Application guide.

The Full Text Searchable option is only available when Full Text is enabled and for the following data type fields:

Decimal	Float
Integer	TextArea
URL	TextField

Formula : Contains the current formula to return a calculated value. Click "Edit Formula" to launch the formula builder to change the formula.

Calculated Value: 

Formula:

For more information on how to build a formula using the formula builder, please refer to the [Using Sugar Logic](#) section in this document.

The Formula option is only available when the Calculated Value option is selected.

Generate URL : Select this checkbox to allow variables from the current module to be placed into the Default Value option for creating dynamic URLs. This is useful for providing links or iFrames to internal systems such as an ERP or to external systems such as Google Maps.

Generate URL:

billing_address_postalcode

Default Value:

Select the desired field to add from the dropdown and click "Insert Field" to add the field to the Default Value. When selecting this option, the field value cannot be modified by users.

The Generate URL option is only available for the following data type fields:

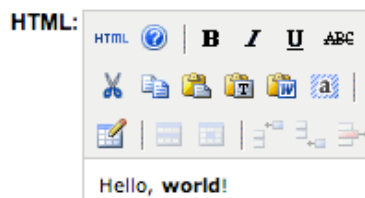
IFrame	URL
--------	-----

Height : Enter the number of pixels to vertically scale the image for this field. Enter only the Width or Height options to retain the aspect ratio of the image. The Height option is only available for Image data type fields.

Help Text : Enter in basic instructions for populating this field. The text entered here will display to users when they hover their mouse over this field in the edit view.

The Help Text option is available for all data type fields.

HTML : Enter in static rich text with formatting or HTML code to display on a record.



For more information on how to use the text editor please refer to the [TinyMCE](#) section of the User Interface document in the Application guide.

The HTML option is only available for HTML data type fields.

IFrame Height : Enter the number of pixels for the height of the IFrame field.

The width of the IFrame field is always the width of the field container.

The IFrame Height option is only available for IFrame data type fields.

Importable : Select one of the following options to determine the field's functionality when records are being imported:

- Yes : The field can be included in an import operation.
- No : The field cannot be included in an import.
- Required : A value for the field must be provided in any import.

Label Value : Enter a value to display as the field label and header in layouts. This value is also modifiable in the modules panel under [Labels](#) . Defaults to "Flex Relate".

The Label Value option is only available for Flex Relate data type fields.

Mass Update : Select this checkbox to add this field as an option to mass update.

The Mass Update option is only available for the following data type fields:

Date	Datetime
DropDown	MultiSelect
Radio	

Max Size : Enter the maximum number of characters allowed for this field. Defaults to 255.

The Max Size option is only available for the following data type fields:

Address	Decimal
Float	IFrame
Integer	Phone
URL	TextField

Max Value : Enter the highest value allowable for this field. If a user attempts to enter a value for this field higher than what is specified here, they will get a prompt showing the range of acceptable values.

The Max Value option is only available for Integer data type fields.

Min Value : Enter the lowest value allowable for this field. If a user attempts to enter a value for this field lower than what is specified here, they will get a prompt showing the range of acceptable values.

The Min Value option is only available for Integer data type fields.

Module : Select a module from the dropdown to relate the current module to. A module can relate back to itself, a good example of this would be a relate field on Contacts to relate back to Contacts for a referred by field. This will allow users to select which contact record referred a different contact. The module cannot be modified after creation.

Module:

The Module option is only available for Relate data type fields.

Open Link In : Select one of the following options to determine how a URL will open:

- New Window : Opens the URL in a new Tab or Window depending on your browser and settings.
- Same Window : Opens the URL in the same window as the record you are currently browsing.

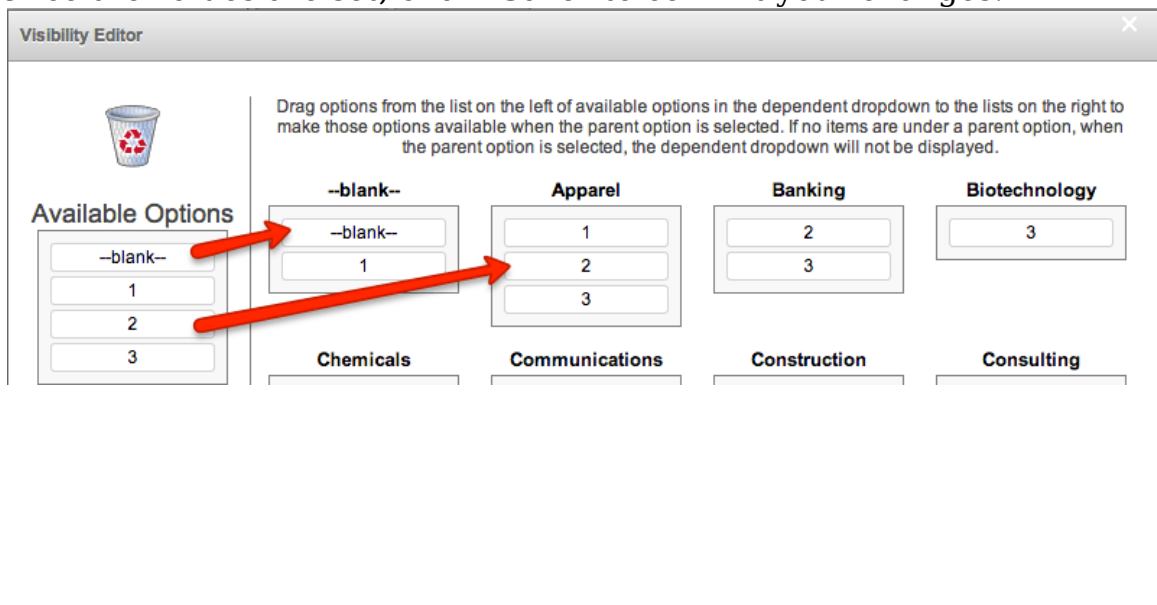
The Open Link In option is only available for URL data type fields.

Parent Dropdown : Select an option from the dropdown to specify the parent that controls the visibility of this dropdown field. The Parent Dropdown option is populated with the other dropdown data type fields in the current module.

Dependent: Parent Dropdown
 Parent Dropdown: Industry Edit Visibility

Click "Edit Visibility" to specify which options are available from the current dropdown for each value of the parent dropdown. In the Visibility Editor window, drag values from the current dropdown list to the value sections of the parent dropdown.

This will determine which options in the dropdown list are available when the parent dropdown is set to the specified value. In this example, if the parent dropdown is set to "Apparel", then the current dropdown will have options 1, 2, and 3 where if the parent dropdown is set to "Banking", then the current dropdown will only have options 2 and 3 available. If there are no available options for a parent dropdown value, then the dropdown will not be visible at all. To remove an item, drag it from the value to the Trash bin on the left. Once the values are set, click "Save" to commit your changes.



The Parent Dropdown option is only available when the Dependent option has "Parent Dropdown" selected.

Precision : Enter a number to specify the number of digits to the right of the decimal point the value should be stored as.

The Precision option is only available for the following data type fields:

Decimal	Float
---------	-------

Reportable : Select this checkbox to allow this field to be used in reports.

The Reportable option is available for all data type fields except Encrypt, Flex Relate, HTML, IFrame, Image.

Required Field : Select this checkbox to make the field required to be populated before saving a record. The user will be prompted to enter a non-blank value for the field upon saving.

The Required Field option is available for all data type fields except Checkbox

and HTML.

Rows : Enter the number of rows to specify the height of a TextArea data type field.

The Rows option is only available for TextArea data type fields.

System Label : Enter the system value for storing the label of the field. This is defaulted to the name of the field preceded with "LBL_". Any lowercase characters entered will be converted to uppercase upon saving. Once the field has been created the system label cannot be changed.

Note : It is recommended to avoid naming multiple fields the same System Label as they will then all share the same label and header value in layouts.

The System Label option is available for all data type fields.

Visible If : Contains the current formula to determine if a field is visible on the layout or not. Click "Edit Formula" to launch the formula builder to change the formula.

Dependent: ⓘ

Visible If:

The formula must result in a Boolean (true/false) response. For more information on how to build a formula using the formula builder, please refer to the [Using Sugar Logic](#) section in this document.

The Visible If option is only available when the Dependent option is checked or "Formula" is selected from the dropdown.

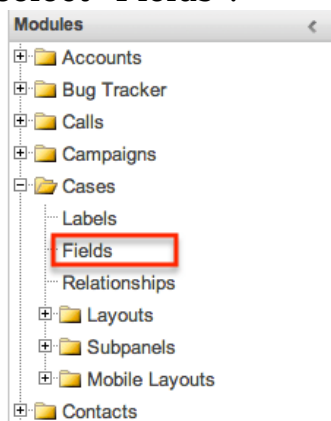
Width : Enter the number of pixels to horizontally scale the image for this field. Enter only the Width or Height options to retain the aspect ratio of the image.

The Width option is only available for Image data type fields.

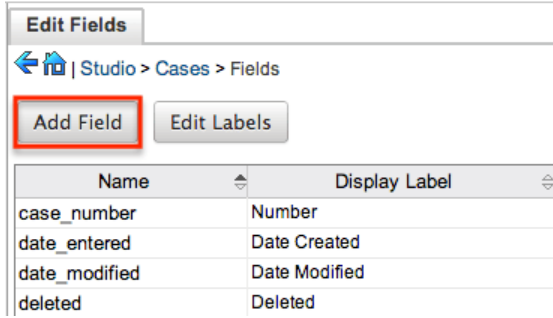
Creating Fields

Use the following steps to create a new field via Studio:

1. Expand out the tree under the desired module in the Modules Panel, and select "Fields".

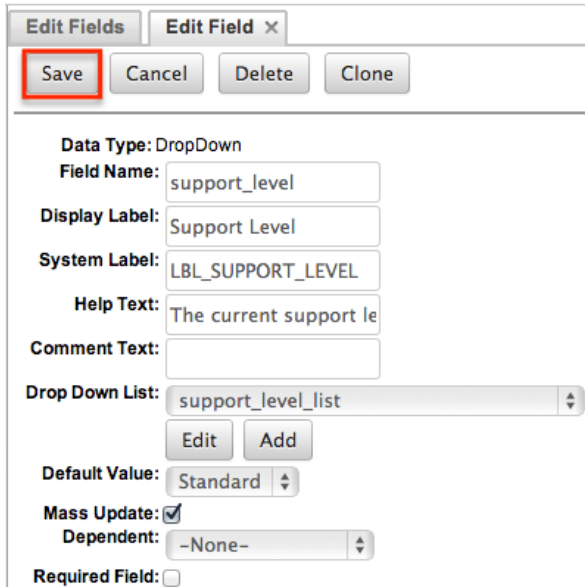


2. In the Main Panel, click "Add Field".



3. Enter appropriate values for the [Field Options](#) . Field Name is required.

4. Once the necessary information is entered, click "Save".

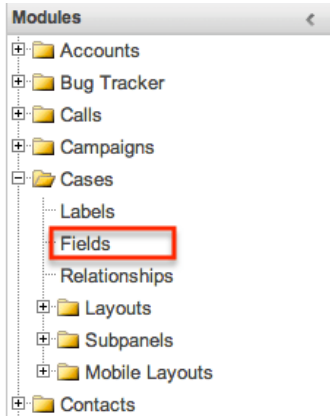


5. After creating a field it must be placed on the edit layout before users will be able to enter data into that field. For more information on editing layouts, please refer to the [Editing Layouts](#) section in this document.

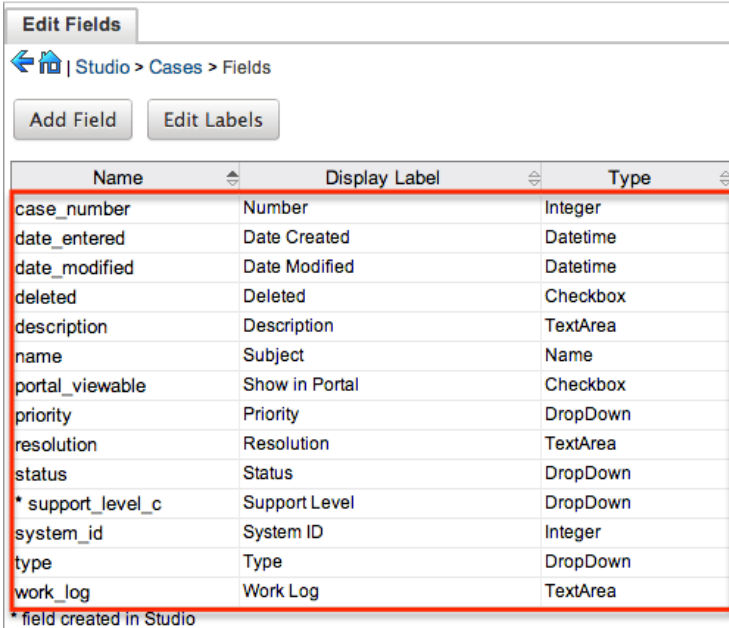
Editing Fields

Use the following steps to edit an existing field via Studio:

1. Expand out the tree under the desired module in the Modules Panel, and select "Fields".

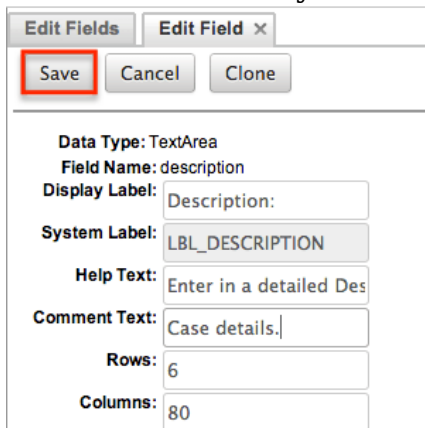


2. In the Main Panel, select a field to edit. Click the column headers to sort the grid by different columns to assist in locating the field.



Note : Fields created via Studio will show with an asterisks next to their names.

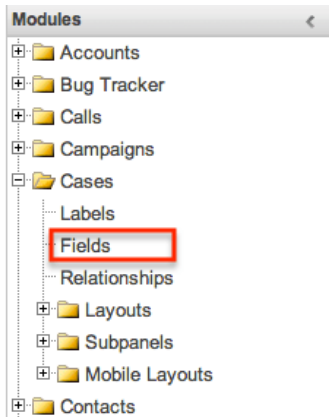
3. Enter appropriate values for the [Field Options](#) .
4. Once the necessary information is entered, click "Save".



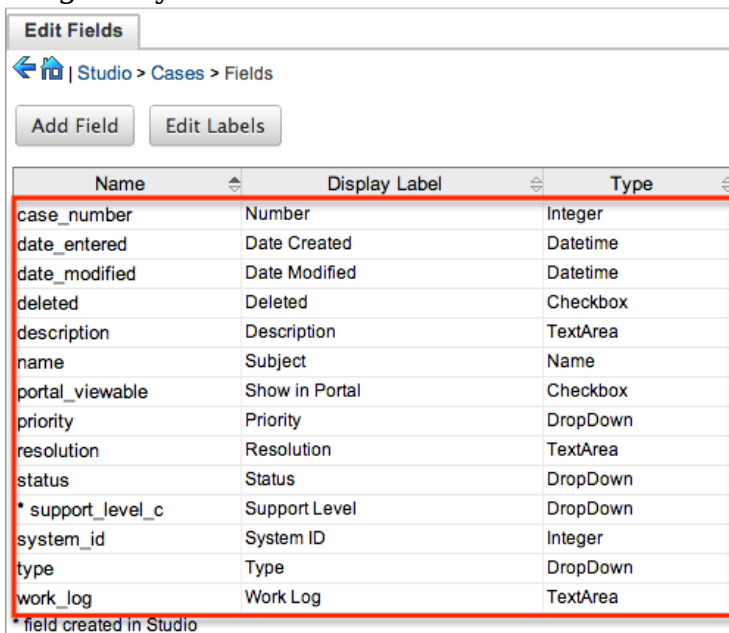
Deleting Fields

Use the following steps to delete an existing field via Studio:

1. Expand out the tree under the desired module in the Modules Panel, and select "Fields".

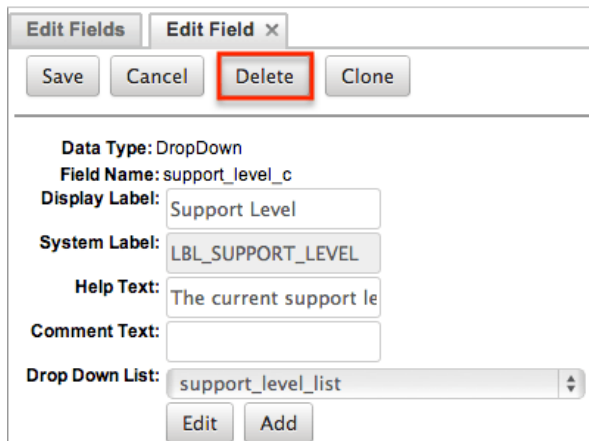


2. In the Main Panel, select a field to delete. Click the column headers to sort the grid by different columns to assist in locating the field.



Note : Fields created via Studio will show with an asterisks next to their names. Stock fields cannot be deleted.

3. Select "Delete".

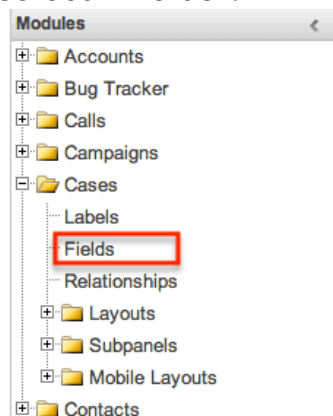


4. A pop-up message will display asking for confirmation. Click "Ok" to proceed. Note : When deleting fields, both the field and all the data related to the field in the database will be permanently removed. Before deleting a field please verify and resolve the following issues:
 1. Field must be removed from any report filters or displays.
 2. Field must be removed from any workflows that filters or displays the field.
 3. Field must be removed from any dashlet that filters or displays the field.
 4. Field must be removed from any Sugar Logic formulas.
 5. Field must be removed from any email templates.
 6. Field must be removed from any saved searches.
5. The field will automatically be removed from any module layouts when deleted.

Cloning Fields

Use the following steps to clone an existing field via Studio:

1. Expand out the tree under the desired module in the Modules Panel, and select "Fields".



2. In the Main Panel, select a field to delete. Click the column headers to sort the grid by different columns to assist in locating the field.

Edit Fields

← Studio > Cases > Fields

Add Field Edit Labels

Name	Display Label	Type
case_number	Number	Integer
date_entered	Date Created	Datetime
date_modified	Date Modified	Datetime
deleted	Deleted	Checkbox
description	Description	TextArea
name	Subject	Name
portal_viewable	Show in Portal	Checkbox
priority	Priority	DropDown
resolution	Resolution	TextArea
status	Status	DropDown
* support_level_c	Support Level	DropDown
system_id	System ID	Integer
type	Type	DropDown
work_log	Work Log	TextArea

* field created in Studio

Note : Fields created via Studio will show with an asterisks next to their names.

3. Select "Clone"

Edit Fields **Edit Field x**

Save Cancel Delete **Clone**

Data Type: DropDown
Field Name: support_level_c
Display Label: Support Level
System Label: LBL_SUPPORT_LEVEL
Help Text: The current support le
Comment Text:
Drop Down List: support_level_list

Edit Add

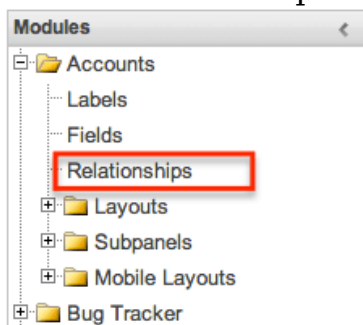
Note : Some non-standard stock fields (e.g. Name) do not have the ability to clone.

4. Enter appropriate values for the [Field Options](#) .
5. Once the necessary information is entered, click "Save".

Relationships

Relationships define the links between different modules in Sugar and allow records between those modules to be related. Related records display in fields or subpanels on a module's detail page depending on the relationship type. When you create a new relationship between two modules, the system automatically creates the necessary subpanels, related fields, and metadata relationships. Relationships provide the added benefit in reports to allow access to a related records fields in addition to the base module's fields.

The relationships section in Studio allows administrators to create new relationships between custom and stock modules as well as change some properties on existing relationships. To access the relationship section in studio, select "Relationships" from the modules panel under the desired module.



The module's relationship tab will open up in the main panel.

Relationship Types

Sugar contains a few different types of relationships you can create between modules. The relationship type will determine what fields or tables will be created

in the database as well as what interface the user will see to manage the relationship.

The following relationship types are available in Studio:

- **One to One** : Records in the primary module and the related module are uniquely related to each other. For a One to One relationship between Accounts and Contacts, an account can be associated with only one contact and a contact can be associated with only one account. The relationship will show as a field in each module's detail view where changing the relationship from either module will also change the value in the other module.

From the Primary Module Account :

Contacts: [Robert Smith](#)

From the Related Module Contact :

Accounts: [SugarCRM Inc](#)

Note : You can create a one way relationship between modules using relate fields. For more information regard relate fields, please refer to the [Field Types](#) section in this document.

- **One to Many** : Records in the primary module can have relationships with many records in the related module. For a One to Many relationship between Accounts and Contacts, an account can be associated with many contacts, but each contact can be associated with only one account. The detail view of the primary module will display a subpanel for the related module, and the detail view of the related module will display a field containing a link to the related record.

From the Primary Module Account :

^ Contacts

Create ▾
Name ⇅
Robert Smith
Jim Smith

From a Related Module Contact :

Accounts: [SugarCRM Inc](#)

Note : A One to Many relationship is the same as a Many to One relationship except the Primary and Related modules are reversed.

- **Many to Many** : Records in both the primary module and the related module can have multiple records related in each module. For a Many to Many relationship between Accounts and Contacts, an account can be associated with many contacts, and a contact can be associated with many accounts. Both module's detail views will display a subpanel for the opposite module.

From the Primary Module Account :

⤴ **Contacts**

Create ▾
Name ⇅
Robert Smith
Jim Smith

From a Related Module Contact :

⤴ **Accounts**

Create ▾
Acct. Name ⇅
SugarCRM Inc
PlanEx

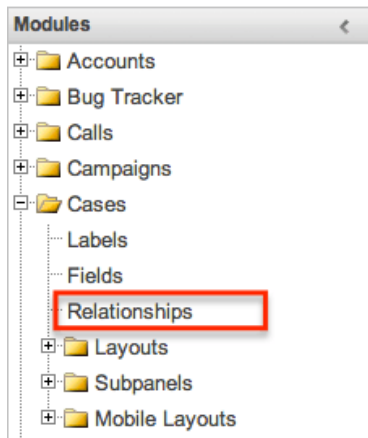
Note : Only modules with subpanels available can be on the "Many" side of a relationship. For example, the Product Catalog module lacks a subpanel; therefore, Product Catalog can only be selected on the "One" side of a relationship.

When you create a relationship for a module, the selected is considered to be the primary module and the module that you relate it with is the related module. You can also create a relationship between a module and itself. In this case, the relationship becomes a parent-child relationship. For example, you can create a relationship from Accounts to Accounts in order to create sub-accounts within the primary account.

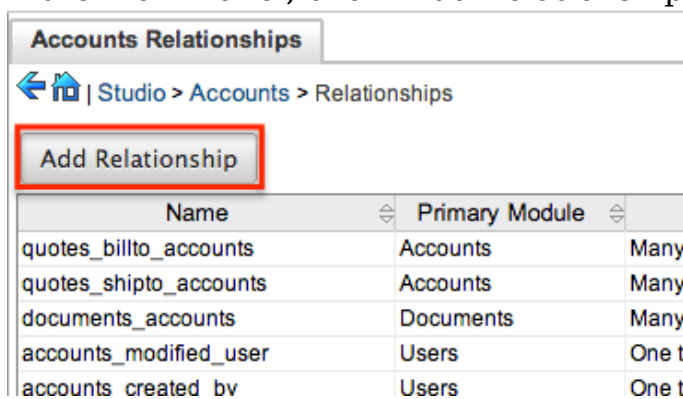
Creating Relationships

Use the following steps to create a new relationship via Studio:

1. Expand out the tree under the desired module in the Modules Panel, and select "Relationships".



2. In the Main Panel, click "Add Relationship".



3. Enter appropriate values for the following options:

Type : Select the type of relationship to create from the options in the [Relationship Types](#) section.

Module : The Primary module is set to the module you are adding the relationship to. Select the Related module from the dropdown. The Primary and Related module can be the same in order to create a parent child relationship.

Label : Enter a label to reference the Primary module or Related module's subpanels for this relationship. This option is only available for the "Many" side of a relationship.

Subpanel from : Select a subpanel option to display the Primary or Related module's records in. This will determine the fields displayed in the subpanel. This option is only available for the "Many" side of a relationship.

4. Once the necessary information is entered, click "Save & Deploy".

Cases Relationships Edit Relationship ×

Save & Deploy Cancel

Language: English (US)

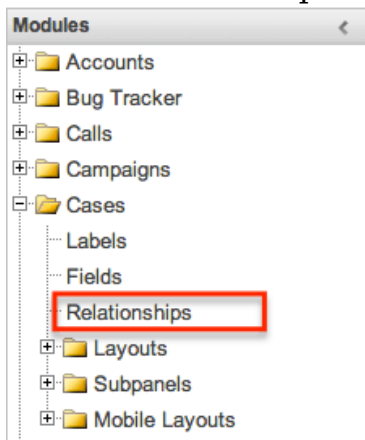
Primary Module		Type	Related Module	
Module:	Cases	Many to Many	Module:	Products
Label:	Product Cases		Label:	Products Affected
Subpanel from Cases:	default		Subpanel from Products:	ForProducts

- The required fields and subpanels are instantly created and deployed to the appropriate modules.

Editing Relationships

Use the following steps to edit a relationship via Studio:

- Expand out the tree under the desired module in the Modules Panel, and select "Relationships".



- In the Main Panel, select a relationship to edit. Click the column headers to sort the grid by different columns to assist in locating the relationship.

Cases Relationships

← | Studio > Cases > Relationships

Add Relationship

Name	Primary Module	Type	Related Module
case_kbdocuments	Cases	One to Many	Knowledge Base
cases_bugs	Cases	Many to Many	Bug Tracker
contacts_cases	Contacts	Many to Many	Cases
projects_cases	Projects	Many to Many	Cases
documents_cases	Documents	Many to Many	Cases
cases_products_1*	Cases	Many to Many	Products
cases_modified_user	Users	One to Many	Cases
cases_created_by	Users	One to Many	Cases
cases_assigned_user	Users	One to Many	Cases
case_calls	Cases	One to Many	Calls
case_tasks	Cases	One to Many	Tasks
case_notes	Cases	One to Many	Notes
case_meetings	Cases	One to Many	Meetings
account_cases	Accounts	One to Many	Cases

* relationship created in Studio

Note : Relationships created via Studio will show with an asterisks next to their names.

- The only field modifiable on a relationship is the Label field for naming the Primary or Related modules subpanels. This option is only available for the "Many" side of a relationship.
- Once the necessary information for the Label field is entered, click "Save".

Cases Relationships | Edit Relationship ×

Save | Cancel | Delete

Language: English (US)

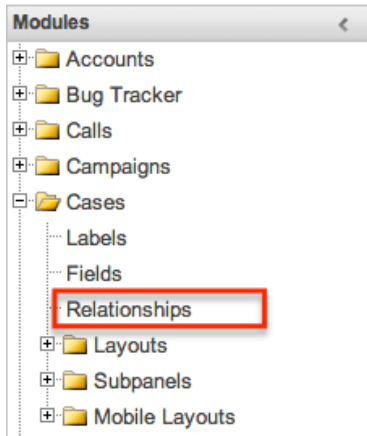
Name: cases_products_1

Primary Module		Type	Related Module	
Module:	Cases	Many to Many	Module:	Products
Label:	Product Issues		Label:	Products Affected
Subpanel from Cases:	default		Subpanel from Products:	ForProducts

Deleting Relationships

Use the following steps to delete a relationship via Studio:

- Expand out the tree under the desired module in the Modules Panel, and select "Relationships".



- In the Main Panel, select a relationship to delete. Click the column headers to sort the grid by different columns to assist in locating the relationship.

Cases Relationships

Studio > Cases > Relationships

Add Relationship

Name	Primary Module	Type	Related Module
case_kbdocuments	Cases	One to Many	Knowledge Base
cases_bugs	Cases	Many to Many	Bug Tracker
contacts_cases	Contacts	Many to Many	Cases
projects_cases	Projects	Many to Many	Cases
documents_cases	Documents	Many to Many	Cases
cases_products_1*	Cases	Many to Many	Products
cases_modified_user	Users	One to Many	Cases
cases_created_by	Users	One to Many	Cases
cases_assigned_user	Users	One to Many	Cases
case_calls	Cases	One to Many	Calls
case_tasks	Cases	One to Many	Tasks
case_notes	Cases	One to Many	Notes
case_meetings	Cases	One to Many	Meetings
account_cases	Accounts	One to Many	Cases

* relationship created in Studio

Note : Relationships created via Studio will show with an asterisks next to their names.

- Select "Delete".

Cases Relationships Edit Relationship x

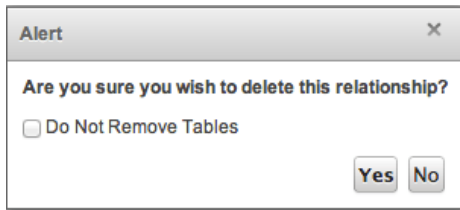
Save Cancel **Delete**

Language: English (US)

Name: cases_products_1

Primary Module	Type	Related Module
Module: Cases	Many to Many	Module: Products
Label: Product Issues		Label: Products Affected
Subpanel from Cases: default		Subpanel from Products: ForProducts

- A pop-up message will display asking for confirmation. Click "Yes" to proceed. If you would like to retain the data and table structure that currently exists for the relationship, select the "Do Not Remove Tables" option.



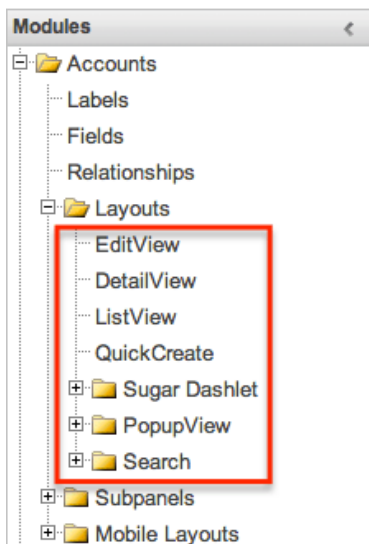
Note : Leaving the "Do Not Remove Tables" unchecked will delete the relationship data and remove the tables for the relationship from the database.

Note : Before deleting a relationship please verify and resolve the following issues:

1. Relationship must be removed from any report filters or displays.
2. Relationship must be removed from any workflows that filters or displays fields from the relationship.
3. Relationship must be removed from any Sugar Logic formulas referencing the relationship.

Layouts

Layouts are used to represent many screens in Sugar. The layouts section in Studio allows administrators to add fields and configure layouts. To access the layouts section in studio, expand "Layouts" from the modules panel under the desired module.



The available layouts for the selected module will appear.

Layout Types

Sugar comes with different types of layouts to represent different sections of

Sugar. Not all layouts are available in every module. The following layouts are available in Sugar:

- **Convert Lead** : Convert lead layout is used in Sugar to allow users to create new records when converting a Lead record. This section allows administrators to configure which module records can be created and the specific layout and fields to use from the module. Convert Lead layout is only available from the Leads module.

Create Account **OR** Select Account *

Name: *	<input type="text" value="SugarCRM"/>	Office Phone:	<input type="text"/>
Website:	<input type="text" value="http://"/>		
Description:	<input type="text"/>		

Create Opportunity
 Create Note
 Log Call
 Schedule Meeting
 Create Task

For more information on modifying the convert lead layout, please refer to the [Editing Convert Lead Layout](#) section below.

- **Edit View** : Edit view layout is used in Sugar to modify or create records in the specified module.
- **Detail View** : Detail view is used in Sugar to view the current data for a record within the specified module.
- **List View** : List view layout is used in Sugar to view multiple records within the specified module. The list view is also used for displaying the results from a Basic or Advanced search.
- **Quick Create** : Quick Create layout is used in Sugar to quickly view, edit, or modify records within the specified module via a popup window, which avoids navigating away from the current page. The quick create layout for a module can be accessed from many different locations throughout Sugar, including other modules.

- Sugar Dashlet List View : Sugar dashlet list view layout is used in Sugar to view multiple records in the dashlet for the specified module. This section allows administrators to include specific fields by default to dashlets, and allow other fields to be added by users to personalize their dashlet.

Acct. Name	Website	Phone	Billing Country
SugarCRM Inc	www.sugarcrm.com	(408) 454-6900	United States

- Sugar Dashlet Search : Sugar dashlet search layout is used in Sugar to filter records in the dashlet for the specified module.

Filters

Only My Items

Date Created:

Industry:

Teams:

Type:

Billing Country:

Assigned to:

- **Popup List View** : Popup list view layout is used in Sugar to view multiple records in a popup window used to locate and select records in the specified module.

Account List

Acct. Name	City	State	Country	User
SugarCRM Inc	Cupertino	California	United States	Administrator

- **Popup Search** : Popup search layout is used in Sugar to allow users to search on records in the popup window used to select records in the specified module.

Account Search

Name:

Billing State:

Any Email:

Billing City:

Billing Country:

Assigned to:

- **Basic Search** : Basic search layout is used in Sugar to allow users to search on records in the basic search section on the list view of the specified module.

Search Accounts

Name: My Items My Favorites [Advanced Search](#)

- **Advanced Search** : Advanced search layout is used in Sugar to allow users to search on records in the advanced search section on the list view of the

specified module.

Search Accounts

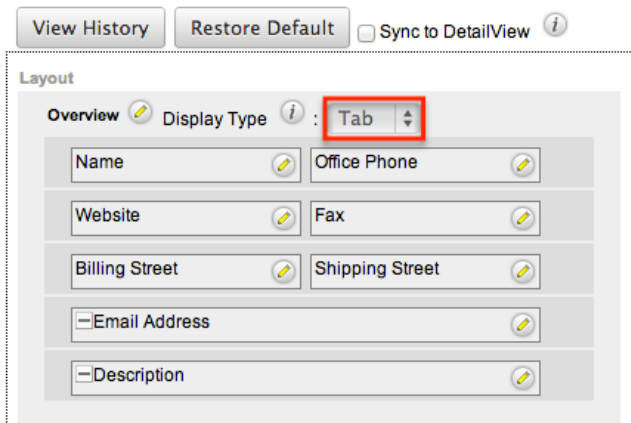
Layout Options

Layouts in Sugar have more options than just positioning of fields. The following are some of the options Sugar administrators have when configuring layouts throughout Studio:

- **Panels** : Every field on a layout is contained within a panel. Panels can be open or collapsed by default and have a title defining the panel. Panels can be organized to contain groups of similar or related fields to assist in organization.

Select the Pencil icon next to the Panel title to modify the title. Select the Collapsed? checkbox to default the panel as collapsed. Users can open and close panels as the wish.

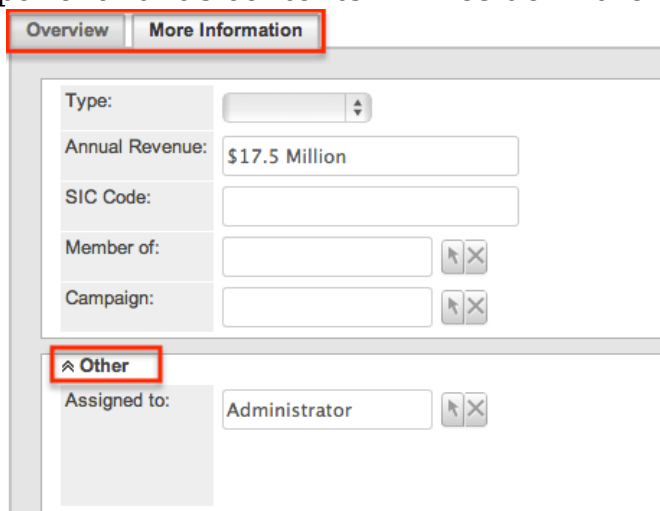
- **Tabs** : Panels can be displayed as Tabs inside a layout. You can also have panels nested inside of tab defined panels. Select "Tab" from the Display Type dropdown to display the panel as a tab.



Every panel listed underneath a Tab display type will be a panel within the tab until the next Tab display type panel is reached. For example, set the panels in the Accounts edit view layout to the following:

Panel Title	Display Type
Overview	Tab
More Information	Tab
Other	Panel

This will display two tabs, Overview and More Information and the Other panel and it's contents will reside in the More Information tab.



Layout History : Sugar keeps a history of the changes made to each layout. These changes and when they occurred can be viewed and restored via "View History". For more information on viewing the history of layouts, please refer to the [Viewing Layout History](#) section of this documentation.

Restore Defaults : Sugar also contains the ability to restore a layout to it's original default configuration. For more information on how to reset a layout to default, please refer to the [Restoring Layout Defaults](#) section in this

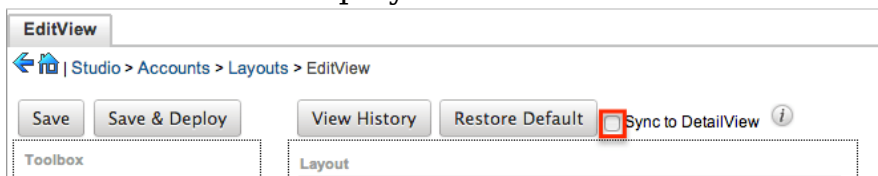
documentation.

Sync and Copy Layouts : Edit view layouts can be synced with detail view layouts to ensure the same fields exist in the same positions on both layouts. Alternately, the detail view and quick create layouts can be copied from the edit view layout. For more information on Syncing and Copying layouts, please refer to the section [Sync And Copy](#) below.

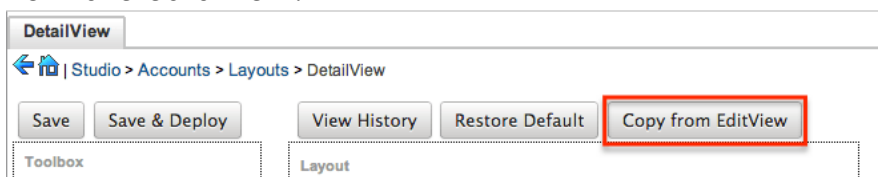
Sync And Copy

Sugar provides administrators with the ability to sync and copy certain layouts to assist in configuring layouts. Often it makes sense for a module's edit view and detail view layouts to be identical. Instead of having to duplicate any changes made to one layout, administrators can configure the detail view layout to be synced to the edit view layout.

To sync the layouts, select the Sync to DetailView checkbox on the edit view layout and click "Save & Deploy".



The current detail view layout will be replaced with the current edit view layout. At this point, changes cannot be made to the detail view layout, but any changes made to the edit view will be automatically synced to the detail view when saved. Alternatively to syncing the layouts, administrators can copy the layout from the edit view to the detail view or the quick create layouts. This is especially useful if you want the layouts to be similar, but different. Make any changes necessary to the edit view layout, and then navigate to either the detail view or quick create layouts. Select "Copy from EditView" to replace the current layout with the details from the edit view.



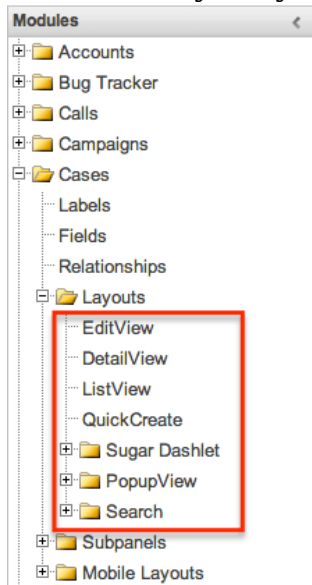
You can then continue to edit the layout as you wish.

Note : The copy feature is a one time copy of the layouts. Any future changes to the edit view layout will not be reflected on the layout copied to without performing the copy again.

Editing Layouts

Use the following steps to edit a layout via Studio:

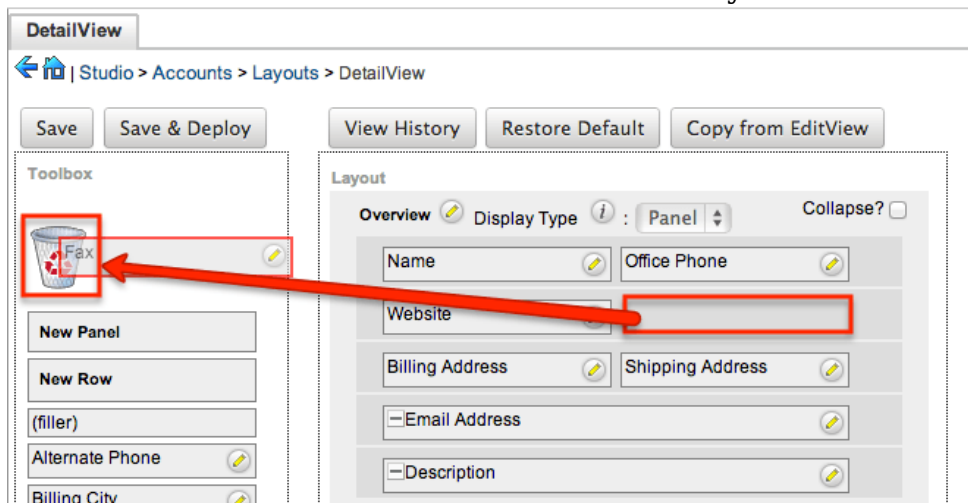
1. Expand "Layouts" from the modules panel under the desired module, and select the layout you wish to edit.



The selected layout will display in the Main Panel.

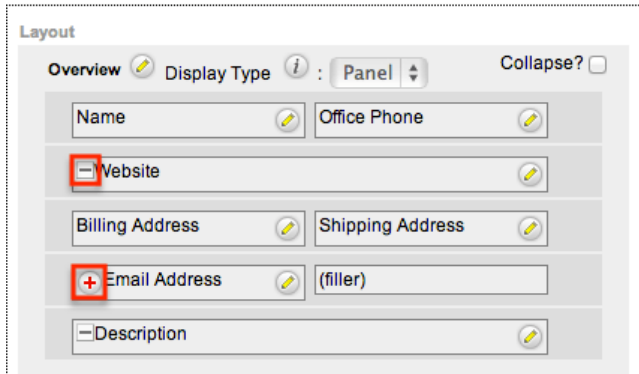
2. Optionally set and configure the [Layout Options](#) or perform the following actions to edit the layout:

Remove a Field from the Layout : Drag a field from the layout to the trash bin in the toolbox to remove the field from the layout.

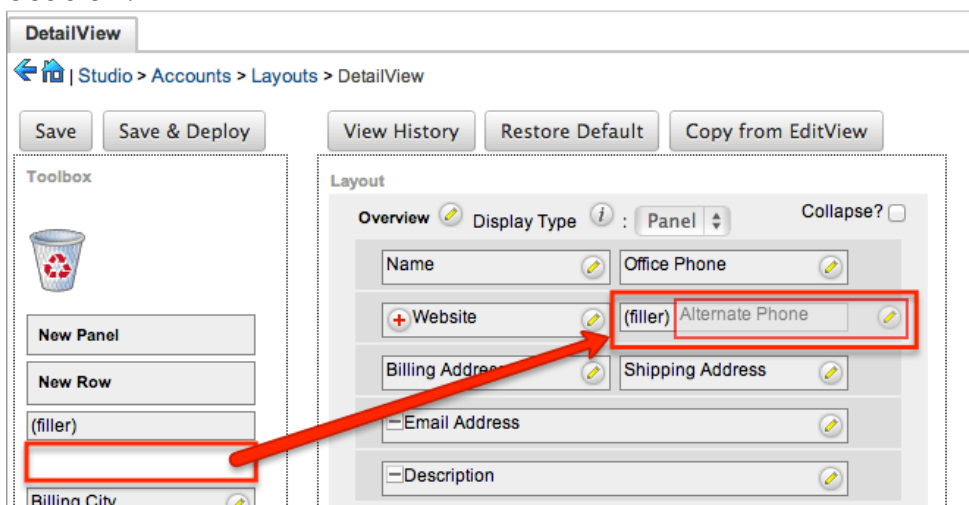


You may remove rows and panels through the same method.

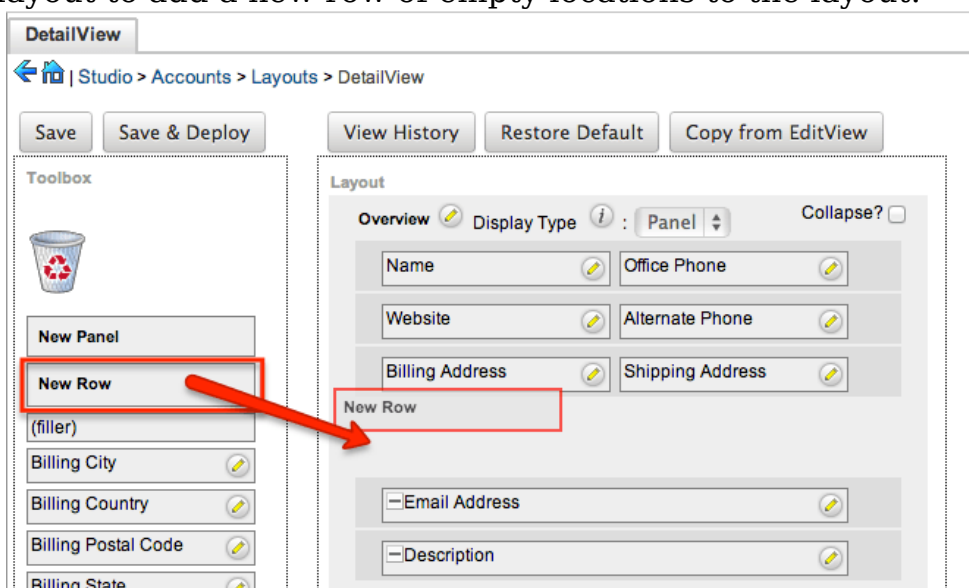
Expand or shrink the size of a Field : Click the plus icon (+) to expand a field to take both columns in the layout or click the minus icon (-) to shrink a field to only take one column.



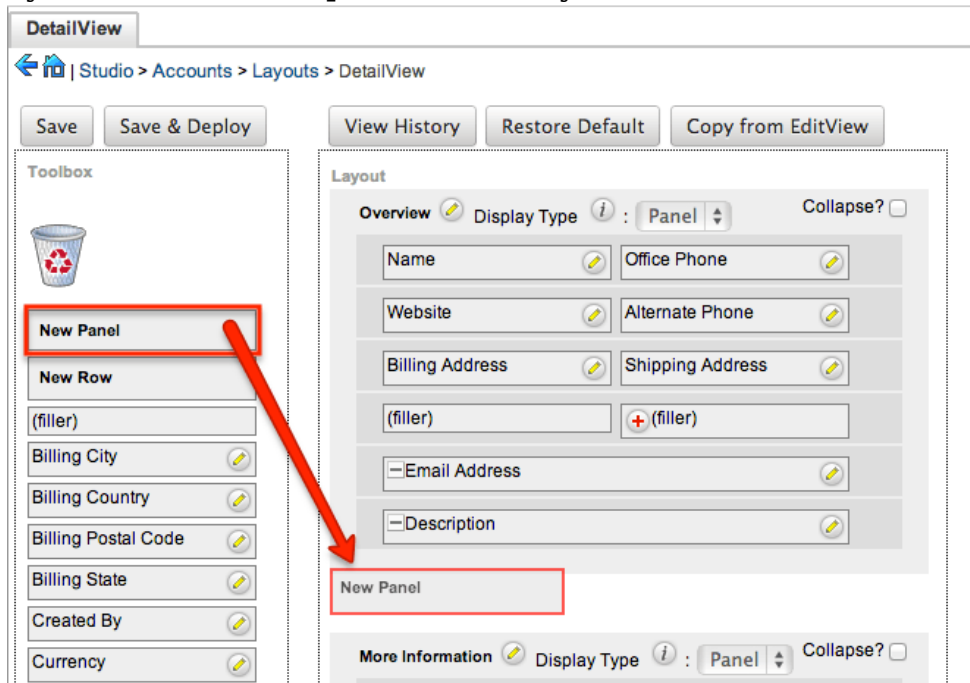
Areas with no field in its location will be referenced with the label "(filler)".
 Add a Field : Drag a field from the list of fields in the Toolbox to an empty location containing the "(filler)" label to add the field to the layout in that location.



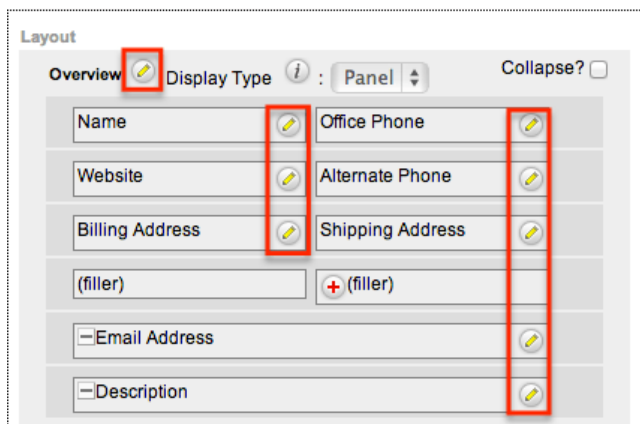
You can also drag a field from the list of fields in the Toolbox to a location that already has a field in it. The current field will automatically be moved to the Toolbox, and will be replaced on the layout with the field being dragged.
 Add a Row : Drag the "New Row" item in the Toolbox into a panel of the layout to add a new row of empty locations to the layout.



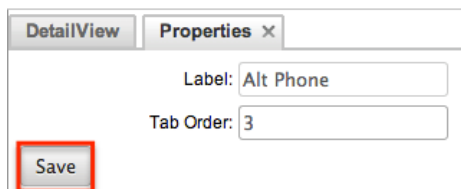
Add a Panel : Drag the "New Panel" item in the Toolbox into a section of the layout to add a new panel to the layout.



Edit a Field Label or Tab order : Click the Pencil icon next to a field to edit the label shown for that field. The tab order of the fields can also be specified here.



This opens a new tab in the main panel. Change the label or tab order fields and click "Save" to continue.

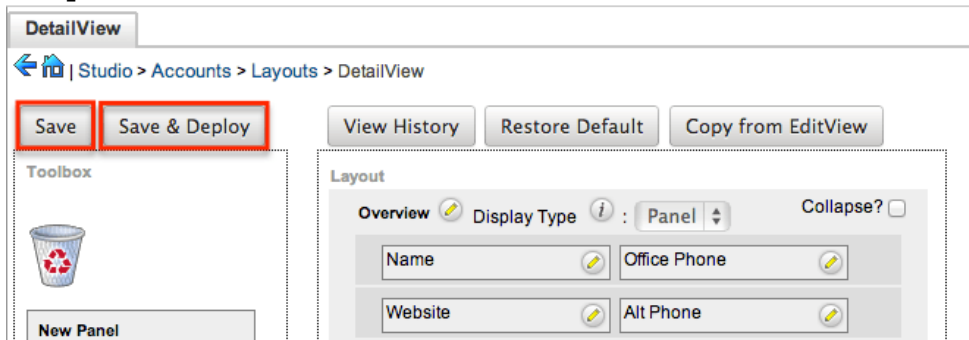


Tab order by default will precede left to right within a panel. Set the tab order for the fields to change where the cursor is placed when using the tab key on the keyboard.

Panel titles can be modified with the same method.

Note : Editing a field label on the layout will change that field's label in all layouts in the specified module.

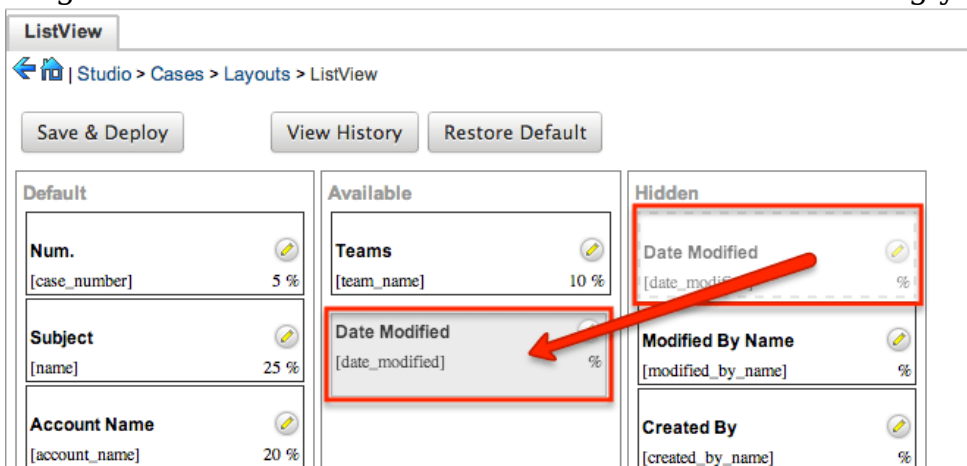
- Once the necessary information for the layout has been configured, click "Save" to preserve your changes or "Save & Deploy" to preserve your changes and push them live.



Some layouts in Sugar are configurable from a positional layout perspective, but some are more a list of available fields. Some examples of these types of layouts are list view, basic, and advanced search. Many of these layout types can be personalized for each user to display and hide certain fields. The list view type of layouts can contain up to three of the following sections to group fields into:

- **Default** : Default fields are the fields that will show by default in the layout.
- **Available** : Available fields are fields that will not show by default in the layout, but if the layout can be personalized, users can add these fields to their view of the layout. Not all list type layouts have an available fields section.
- **Hidden** : Hidden fields are fields that will not show in the layout and cannot be personalized to be added to their view of the layout.

Drag fields between these sections to set them accordingly.



Click the Pencil icon to modify the label of the field as well as the width percentage the field will take up in the list.

Default	Available	Hidden
Num. [case_number] 5 %	Teams [team_name] 10 %	Modified By Name [modified_by_name] %
Subject [name] 25 %	Date Modified [date_modified] 10 %	Created By [created_by_name] %
Account Name [account_name] 20 %		Description [description] %
Priority [priority] 10 %		Type [type] %

Edit the label or width percentage, and click "Save" to continue.

Note : Editing a field label on ListView layout will change that field's label in all ListView layouts.

ListView Properties x

Label: Ticket Num

Width: 10

Save

Click "Save & Deploy" to preserve your changes and push them live.

ListView

Studio > Cases > Layouts > ListView

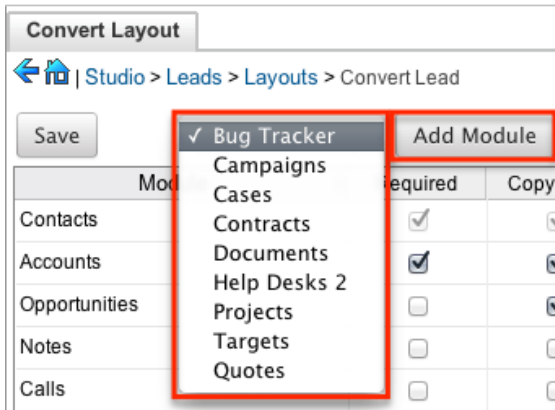
Save & Deploy View History Restore Default

Default	Available	Hidden
Ticket Num [case_number] 10 %	Teams [team_name] 10 %	Modified By Name [modified_by_name] %
Subject [name] 25 %	Date Modified [date_modified] 10 %	Created By [created_by_name] %

Editing Convert Lead Layout

The convert lead layout in Sugar is structured differently from the other layouts. From this layout you can configure how different module records behave when converting a lead to a contact.

To add a module to the convert lead layout, select the module from the dropdown and click "Add Module".



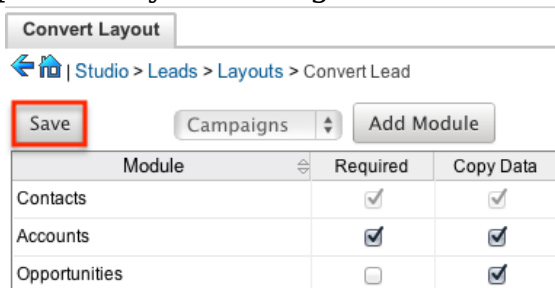
Select the necessary checkboxes for the module:

- Required : Required modules must be created or selected before the lead can be converted.
- Copy Data : If checked, fields from the lead will be copied to fields with the same name in the newly created records.
- Allow Selection : Modules with a relate field in Contacts can be selected rather than created during the convert lead process.

Click the pencil icon to edit the layout for the module or click the minus icon to remove the module from the lead convert layout.

Module	Required	Copy Data	Allow Selection	Edit	Delete
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Opportunities	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Calls	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Bug Tracker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

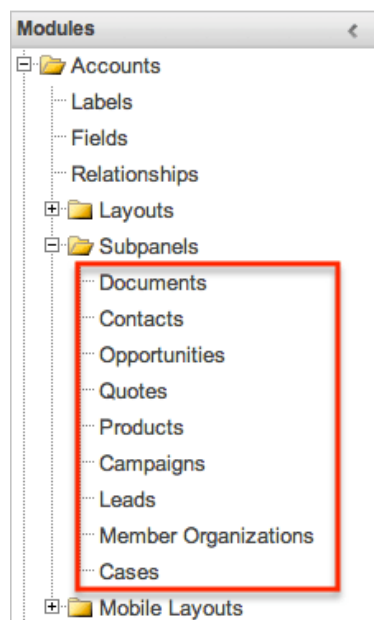
Once the options and layout for each module have been configured, click "Save" to preserve your changes.



Subpanels

Related records between modules in Sugar are commonly displayed in Subpanels.

Similar to list type layouts, administrators can modify the subpanel layouts to change which fields are shown in a module's subpanel. You can add or remove fields for these subpanels depending on the information that you want to display to users. You can also rename a subpanel if needed. To access the subpanels section in Studio, expand "Subpanels" from the modules panel under the desired module.

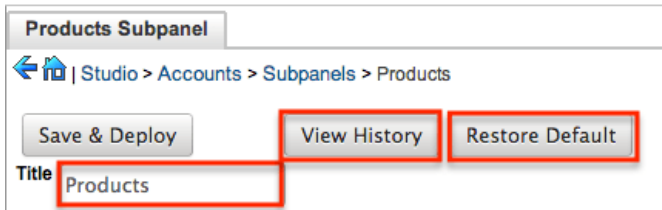


The available subpanels for the selected module will appear. Each module will have a different list of subpanels available.

Subpanel Options

Subpanels in Sugar have more options than just positioning of fields. The following are some of the options Sugar administrators have when configuring subpanels throughout Studio:

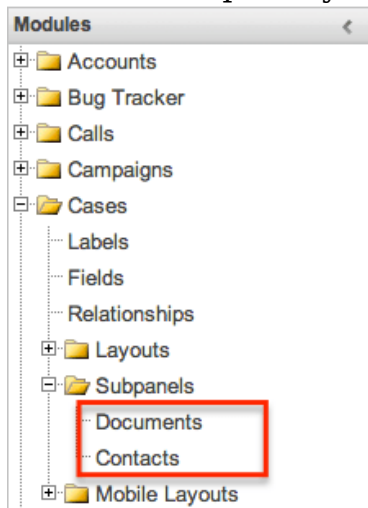
- **Subpanel Title** : Sugar administrators have the option to modify the name of subpanel. This will change the display value of the subpanel when viewing the detail view of a record from the specified module.
- **Layout History** : Sugar keeps a history of the changes made to each subpanel. These changes and when they occurred can be viewed and restored via "View History". For more information on viewing the history of subpanels, please refer to the [Viewing Layout History](#) section of this documentation.
- **Restore Defaults** : Sugar also contains the ability to restore a subpanel to its original default configuration. For more information on how to reset a subpanel to default, please refer to the [Restoring Layout Defaults](#) section in this documentation.



Modifying Subpanels

Use the following steps to modify a subpanel via Studio:

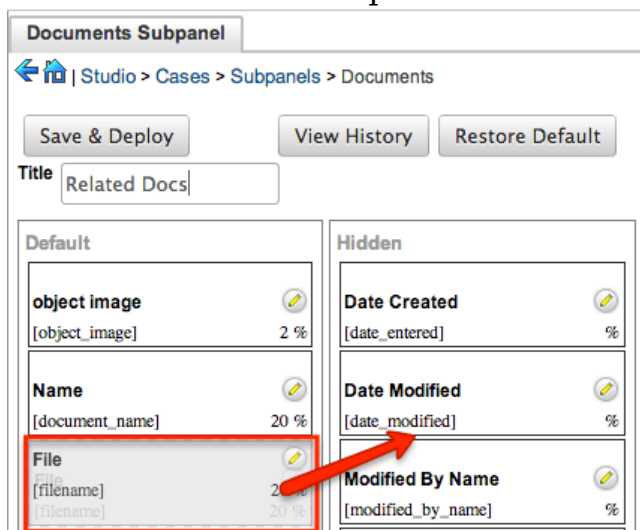
1. Expand "Subpanels" from the modules panel under the desired module, and select the subpanel you wish to edit.



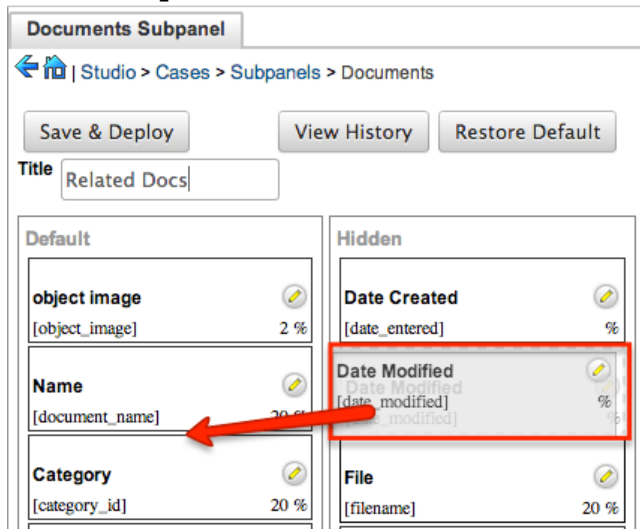
The selected subpanel will display in the Main Panel.

2. Optionally set and configure the [Subpanel Options](#) or perform the following actions to edit the subpanel:

Remove a Field : Drag a field from the Default panel to the Hidden panel to remove it from the subpanel.

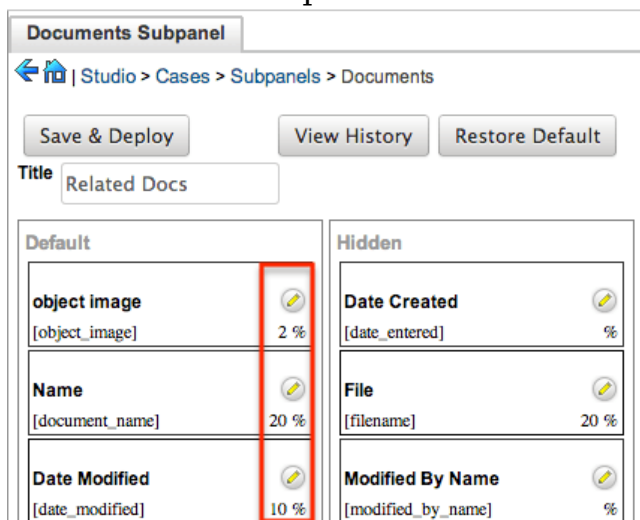


Add a Field : Drag a field from the Hidden panel to the Default panel to add it to the subpanel.

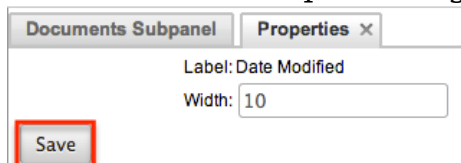


Change Field Order : Drag a field up and down in the Default list to move its position left and right in the subpanel.

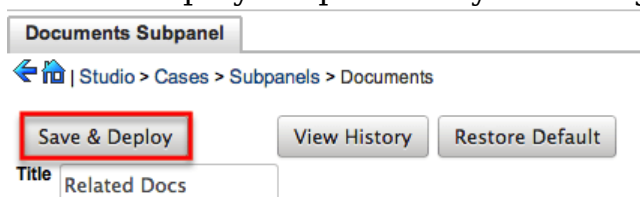
Edit a Field's Width : Click the Pencil icon to change the percentage width of the field in the subpanel.



Enter in the width percentage and click "Save" to continue.

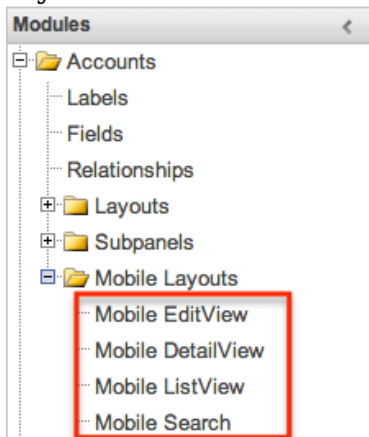


3. Once the necessary information for the subpanel has been configured, click "Save & Deploy" to preserve your changes and push them live.



Mobile Layouts

Mobile layouts are used to represent the screens in Sugar mobile applications. The mobile layouts section in Studio allows administrators to add fields and configure mobile layouts. To access the mobile layouts section in studio, expand "Mobile Layouts" from the modules panel under the desired module.



The available mobile layouts for the selected module will appear.

Mobile Layout Types

Sugar comes with different types of mobile layouts to represent different sections of the mobile applications. Not all layouts are available in every module and the different mobile applications will use the information defined here differently. The following mobile layouts are available in Sugar:

- **Edit View** : Edit view layout is used in Sugar to modify or create records in the specified module.
- **Detail View** : Detail view is used in Sugar to view the current data for a record within the specified module.
- **List View** : List view layout is used in Sugar to view multiple records within the specified module.
- **Search** : Search layout is used in Sugar to allow users to search on records in the specified module.

Mobile Layout Options

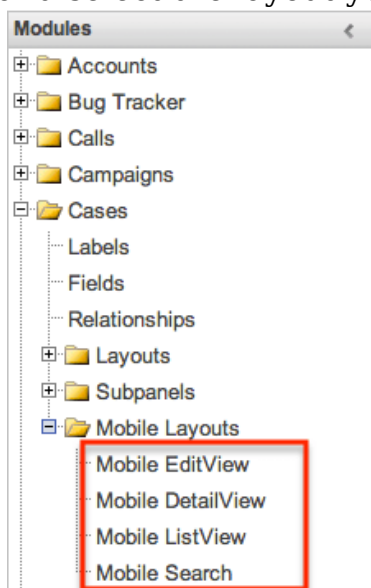
Mobile layouts in Sugar have more options than just positioning of fields. The following are some of the options Sugar administrators have when configuring mobile layouts throughout Studio:

- Layout History : Sugar keeps a history of the changes made to each layout. These changes and why they occurred can be viewed and restored via "View History". For more information on viewing the history of layouts, please refer to the [Viewing Layout History](#) section of this documentation.
- Restore Defaults : Sugar also contains the ability to restore a layout to its original default configuration. For more information on how to reset a layout to default, please refer to the [Restoring Layout Defaults](#) section in this documentation.

Modifying Mobile Layouts

Use the following steps to edit a mobile layout via Studio:

1. Expand "Mobile Layouts" from the modules panel under the desired module, and select the layout you wish to edit.



The selected mobile layout will display in the Main Panel.

2. Optionally set and configure the [Mobile Layout Options](#) or perform the following actions to edit the layout:

Remove a Field from the Layout : Drag a field from the layout to the trash bin in the toolbox to remove the field from the layout. You may remove rows through the same method.

Areas with no field in its location will be referenced with the label "(filler)".

Add a Field to the layout: Drag a field from the list of fields in the Toolbox to an empty location containing the "(filler)" label to add the field to the layout in that location.

You can also drag a field from the list of fields in the Toolbox to a location that already has a field in it. The current field will automatically be moved to the Toolbox, and will be replaced on the layout with the field being dragged.

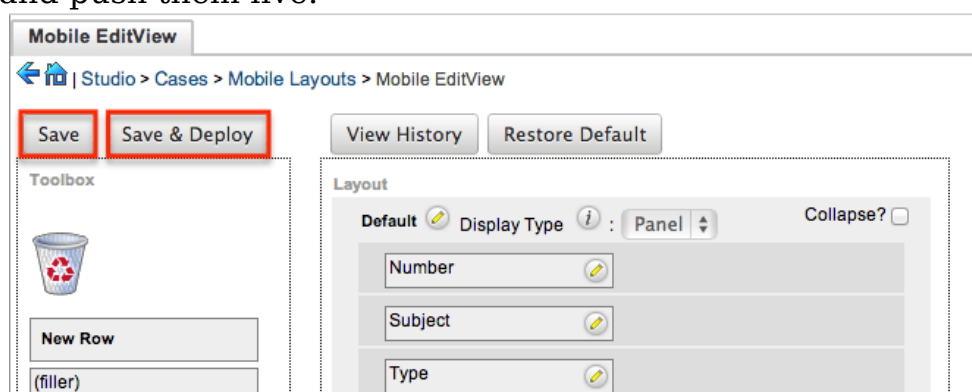
Add a Row to the Layout : Drag the "New Row" item in the Toolbox into a

panel of the layout to add a new row with an empty location to the layout. Edit a Field Label or Tab order : Click the Pencil icon next to a field to edit the label shown for that field. The tab order of the fields can also be specified here.

This opens a new tab in the main panel. Change the label or tab order fields and click "Save" to continue.

Note : Editing a field label on the layout will change that field's label in all layouts in the specified module.

3. Once the necessary information for the layout has been configured, click "Save" to preserve your changes or "Save & Deploy" to preserve your changes and push them live.



Some layouts in Sugar are configurable from a positional layout perspective, but some are more a list of available fields. Examples of these types of layouts are mobile list view and mobile search. Many of these layout types can be personalized for each user to display and hide certain fields. The list view type of layouts can contain up to three of the following sections to group fields into:

- Default : Default fields are the fields that will show by default in the layout.
- Available : Available fields are fields that will not show by default in the layout, but if the layout can be personalized, users can add these fields to their view of the layout. Not all list type layouts have an available fields section.
- Hidden : Hidden fields are fields that will not show in the layout and cannot be personalized to be added to their view of the layout.

Drag fields between these sections to set them accordingly. Click the Pencil icon to modify the label of the field. Edit the label and click "Save" to continue.

Note : Editing a field label on ListView layout will change that field's label in all ListView layouts.

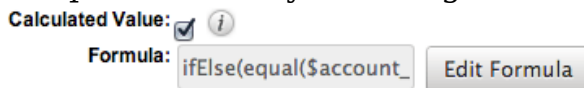
Using Sugar Logic

Sugar Logic allows Sugar administrators to write simple formulas and logic checks

to provide a calculation for a field or to set the visibility of a field. A formula specifies one or more field values along with operators and functions that are mathematical or logical. When you execute a formula, Sugar performs the calculation to derive the value. When a field is used in a formula, Sugar recalculates the value whenever a user updates it and saves the record. Similarly, if you update a formula, Sugar recalculates the field value based on the updated formula.

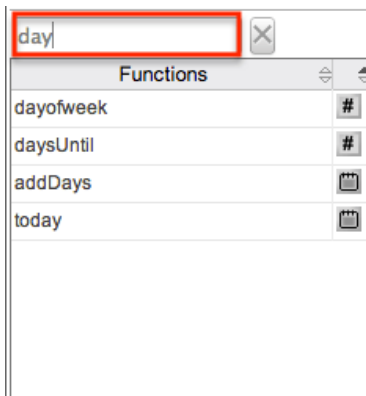
For more information regarding the types of fields you can use Sugar Logic in, please refer to the [Field Options](#) section in this documentation.

Administrators can access the formula builder for the fields and options that accept formulas by selecting "Edit Formula".

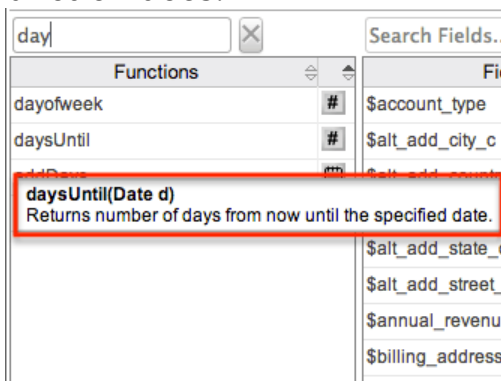


Functions

Functions are listed on the bottom left hand corner of the formula builder and provide a variety of calculations, logic checks, and formatting options. To locate the function you need, you can scroll through the list or enter search criteria to narrow the list.

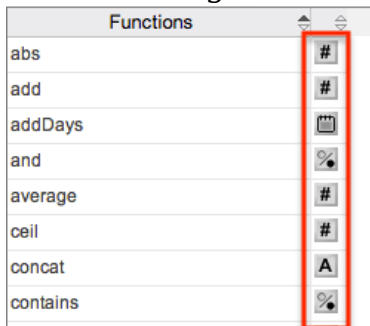


To see how to use a function and what the function does, simply hover over the function to view the syntax, parameters, and a brief description of what the function does.



The function name is followed by a comma-separated list of parameters to the

function. The list specifies the data type expected for each parameter. For example, the function `daysUntil` expects one parameter of Date type. The brief description in the hover text will typically specify what data type is being returned, but if it does not, you can determine the data type being returned via the icon to the right of the function in the grid.



The following is a list of the possible return type symbols and what they stand for:

Symbol	Description
#	Returns a Number
Calendar	Returns a Date object with a date and time
%	Returns a Boolean (true or false) value
A	Returns Text
[]	Returns a List
?	Returns a variable data type that could be any of the above

Functions are defined to either accept a set number of parameters or have an undetermined amount of parameters. Many function parameters require a specific data type to be passed in for the function to work. Functions can be nested matching up the return data type of the function to the parameter data type of a different function. The following functions and their parameters (multiple parameters are indicated with "...") are available in Sugar:

Function	Description	Parameters	Return Type
<code>abs</code>	Returns the absolute value of <code>\$param1</code> .	Number <code>\$param1</code>	Number
<code>add</code>	Returns the sum of the given parameters.	Number <code>\$param1</code> , ...	Number
<code>addDays</code>	Returns <code>\$date</code> moved forward or backwards by <code>\$days</code> .	Date <code>\$date</code> , Number <code>\$days</code>	Date

and	Returns true if and only if all given parameters are true.	Boolean \$param1, ...	Boolean
average	Returns the average of the given parameters.	Number \$param1, ...	Number
ceil	Returns \$param1 rounded up to the next integer.	Number \$param1	Number
concat	Returns all of the given parameters appended together in the order passed.	String \$param1, ...	Text
contains	Returns true if \$needle is within \$haystack.	String \$haystack, String \$needle	Boolean
count	Returns the number of records related to this record by \$module	Relate \$module	Number
createList	Returns a List of the given parameters.	Generic \$param1, ...	List
date	Returns \$param1 as a Date object.	String \$param1	Date
dayofweek	Returns the number of the day of week that \$param1 falls on.	Date \$param1	Number
daysUntil	Returns number of days from now until \$param1.	Date \$param1	Number
divide	Returns the \$numerator divided by the \$denominator.	Number \$numerator, Number \$denominator	Number
equal	Returns true if \$param1 is equal to \$param2.	Generic \$param1, Generic \$param2	Boolean
floor	Returns \$param1	Number \$param1	Number

	rounded down to the next integer.		
getDropdownKeySet	Returns a List of the keys in the dropdown named \$param1. This list must be defined in the Dropdown editor.	String \$param1	List
getDropdownValue	Returns the value for the \$key found in the dropdown named \$list. This list must be defined in the Dropdown editor.	String \$list, String \$key	Text
getDropdownValueSet	Returns a List of the values in the dropdown named \$param1. This list must be defined in the Dropdown editor.	String \$param1	List
greaterThan	Returns true if \$param1 is greater than \$param2.	Number \$param1, Number \$param2	Boolean
ifElse	Returns \$return1 if \$condition is true or \$return2 if \$condition is false.	Boolean \$condition, Generic \$return1, Generic \$return2	Variable
indexOf	Returns the position of \$needle in \$haystack or -1 if \$haystack does not contain \$needle. The index starts at 0.	Generic \$needle, List \$haystack	Number
isAfter	Returns true if \$param1 is after \$param2.	Date \$param1, Date \$param2	Boolean
isBefore	Returns true if \$param1 is before \$param2.	Date \$param1, Date \$param2	Boolean

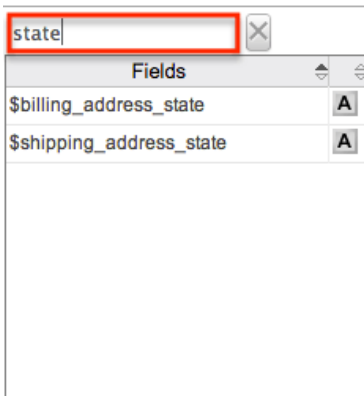
isInList	Returns true if \$needle is contained within \$haystack.	Generic \$needle, List \$haystack	Boolean
isValidDate	Returns true if \$param1 is a valid date string.	String \$param1	Boolean
isValidEmail	Returns true if \$param1 is in a valid email address format.	String \$param1	Boolean
isWithinRange	Returns true if \$value is greater than or equal to \$min and less than or equal to \$max.	Number \$value, Number \$min, Number \$max	Boolean
ln	Returns the natural log of \$param1.	Number \$param1	Number
log	Returns the \$base Log of \$value.	Number \$value, Number \$base	Number
max	Returns highest value of the given parameters.	Number \$param1, ...	Number
median	Returns the median of the given parameters.	Number \$param1, ...	Number
min	Returns lowest value of the given parameters.	Number \$param1, ...	Number
monthofyear	Returns the number of the month that \$param1 is in.	Date \$param1	Number
multiply	Returns the value of the given parameters multiplied together.	Number \$param1, ...	Number
negate	Returns the negated value of \$param1.	Number \$param1	Number
not	Returns true if \$param1 is false,	Boolean \$param1	Boolean

	and false if \$param1 is true.		
now	Returns a Date object representing todays date and the current time.		Date
number	Returns the numeric value of \$param1.	String \$param1	Number
or	Returns true if any given parameters are true.	Boolean \$param1, ...	Boolean
pow	Returns the \$value raised to the power of \$exponent.	Number \$value, Number \$exponent	Number
related	Returns the value of \$field in the related \$module.	Relate \$module, String \$field	Variable
rollupAve	Returns the average value of \$field in records related to \$module.	Relate \$module, String \$field	Number
rollupMax	Returns the highest value of \$field in records related to \$module.	Relate \$module, String \$field	Number
rollupMin	Returns the lowest value of \$field in records related to \$module.	Relate \$module, String \$field	Number
rollupSum	Returns the sum of the values of \$field in records related to \$module.	Relate \$module, String \$field	Number
strlen	Returns the number of characters in \$param1.	String \$param1	Number
strToLower	Returns \$param1 converted to lower case.	String \$param1	Text
strToUpper	Returns \$param1	String \$param1	Text

	converted to upper case.		
subStr	Returns the portion of \$value specified by \$start and \$length. The position starts at 0.	String \$value, Number \$start, Number \$length	Text
subtract	Returns \$param1 minus \$param2.	Number \$param1, Number \$param2	Number
today	Returns a Date object representing todays date.		Date
toString	Returns \$param1 converted to a string.	Generic \$param1	Text
translateLabel	Returns the translated value of \$label for \$module.	String \$label, String \$module	Text
valueAt	Returns the value at position \$index in \$haystack.	Number \$index, List \$haystack	Variable

Fields

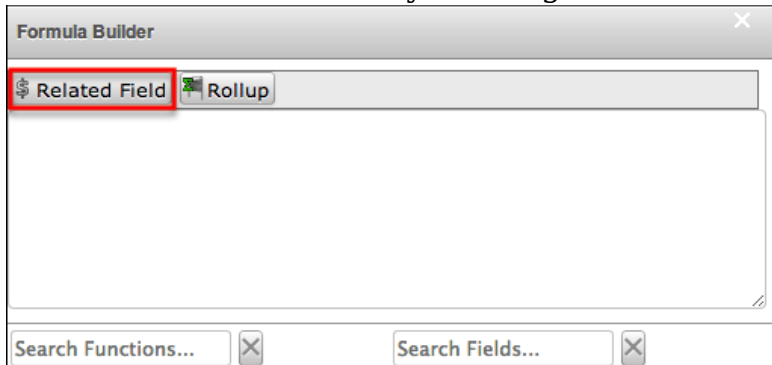
Fields are listed on the bottom right hand corner of the formula builder and contain the fields for the current module. Fields can be referenced in formulas and will start with a \$. To locate the field you need, you can scroll through the list or enter search criteria to narrow the list.



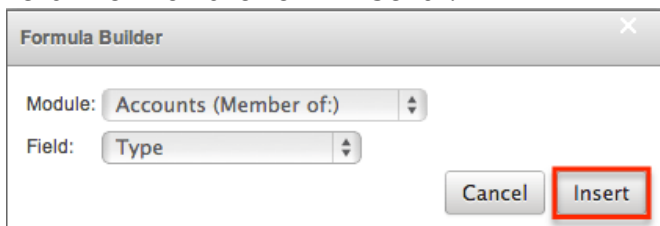
To add a field to the formula, simply click on the field to be added. The variable name for the field will be placed at the end of the formula. You can also type the variable names manually in the formula.

Related Field

Related fields are available to be added to formulas via the related function. You can manually add related function calls to your formula or you can build the syntax for the related function by clicking "Related Field".



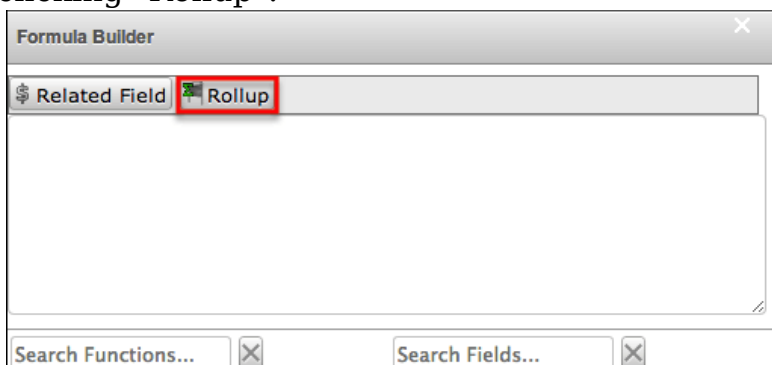
This will open a dialog box which will assist in building the syntax to use the related function. Select a module and a field within that module to pull the related field from and click "Insert".



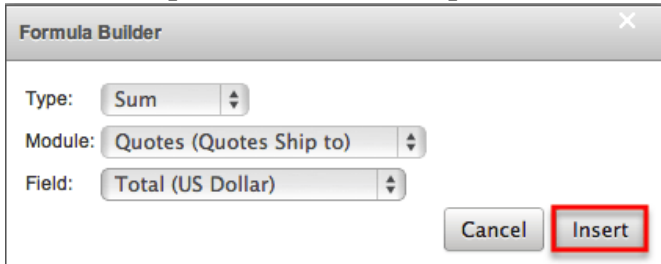
The resulting syntax for the selected options will be added to the formula.
Note : If a record has multiple related records to a module, the related function will pull the field from one of the related records. It is not recommended to rely on the related function to pull the same related records for a many relationship.

Rollup

In addition to adding related fields, you can also add aggregate functions on related fields to formulas via the rollup functions. You can manually add rollup function calls to your formula or you can build the syntax for the rollup function by clicking "Rollup".



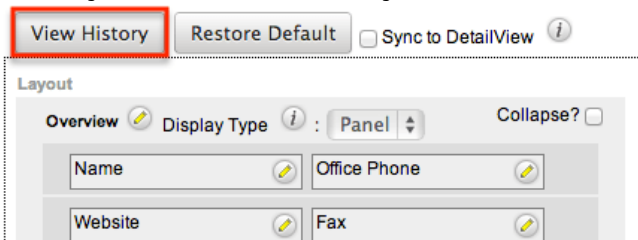
This will open a dialog box which will assist in building the syntax to use the rollup function. Select the type of rollup function to perform (Sum, Average, Minimum, or Maximum). To perform a count of related records, please refer to the count function listed in the [Functions](#) section. Select a module and a field within that module to perform the rollup function on and click "Insert".



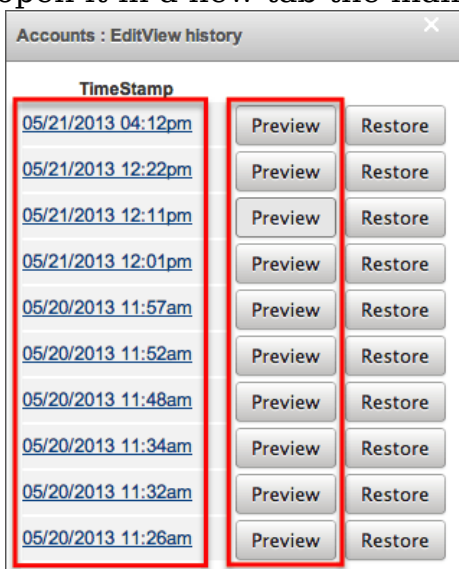
The resulting syntax for the selected options will be added to the formula. Note : Rollup functions can only aggregate number type fields.

Viewing Layout History

Layouts, subpanels, and mobile layouts keep a history of the last ten changes made to the layout. To view the history for any of these layouts, simply select "View History" from the edit layout screen in Studio.

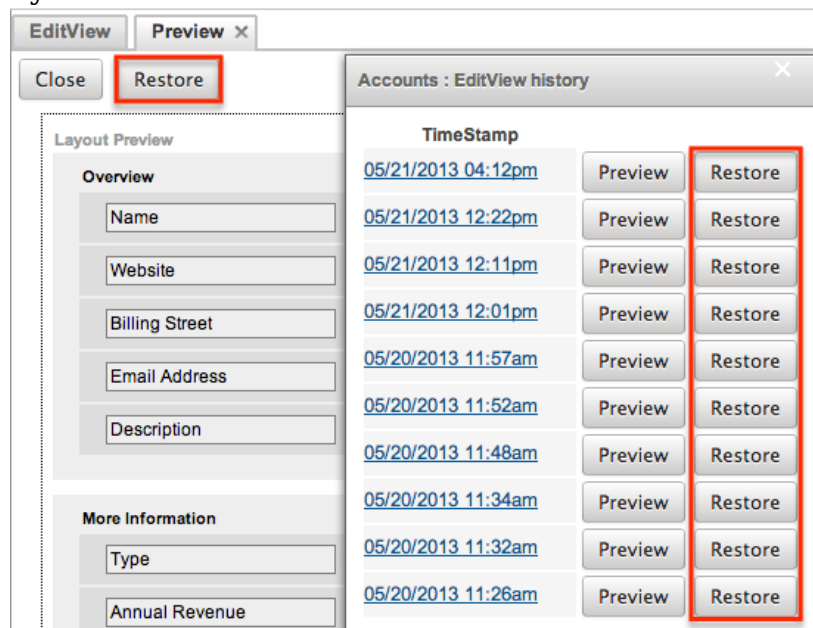


The history dialog box will open up showing the timestamps of the last ten saves to the selected layout. Select the timestamp or "Preview" for the layout revision to open it in a new tab the main panel.



From the Preview tab, you can see the details of the panels and fields on the

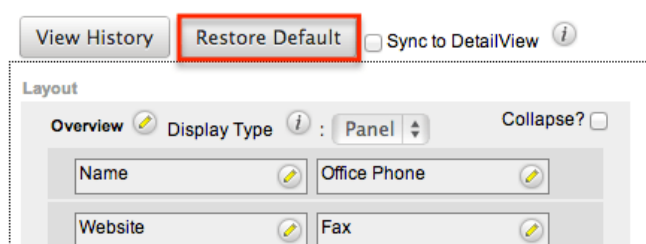
layout. From the history dialog or from the Preview tab, click "Restore" to set the layout to the version selected.



The layout will load into the editor to allow you to make changes. Click "Save" to preserve your changes or "Save & Deploy" to preserve your changes and push them live.

Restoring Layout Defaults

Many layouts, subpanels, and mobile layouts can be restored to their original default configuration. To restore the default for any of these layouts, simply select "Restore Default" from the edit layout screen in Studio.

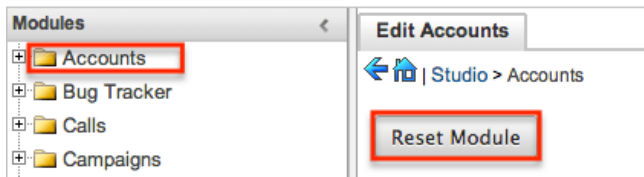


The default layout will load into the editor to allow you to make changes. Click "Save" to preserve your changes or "Save & Deploy" to preserve your changes and push them live.

Resetting Modules

Sugar comes with the ability to reset an entire module back to default settings. You can also pick and choose which customizations you would like to remove. To reset a module, select the module from the Modules Panel and click "Reset

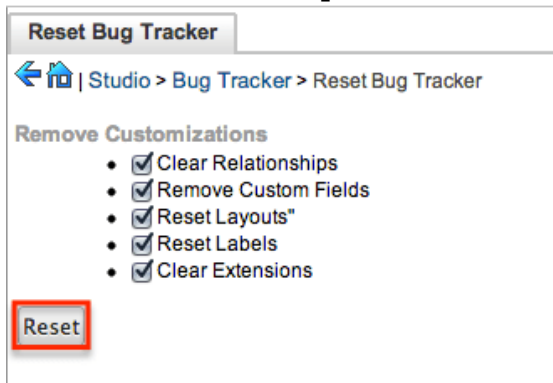
Module" in the Mail Panel.



The next screen will give you the following options to remove specific customizations:

- Clear Relationships : Deletes all relationships added through studio.
- Remove Custom Fields : Deletes all fields added through studio.
- Reset Layouts : Deletes the current layouts. You will need to click "Save & Deploy" on edit view and detail view layouts to be able to access the layouts.
- Reset Labels : Deletes the custom language files located in `./custom/modules/{Module Name}/language/` which sets the labels for the module.
- Clear Extensions : Deletes any customizations made to stock or custom fields and sets them back to default. Deletes the module folder located in `./custom/Extension/modules/`.

Select the desired options and click "Reset" to execute the reset.

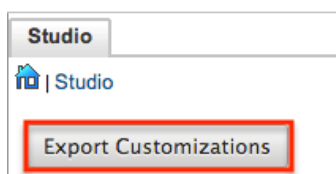


Export Customizations

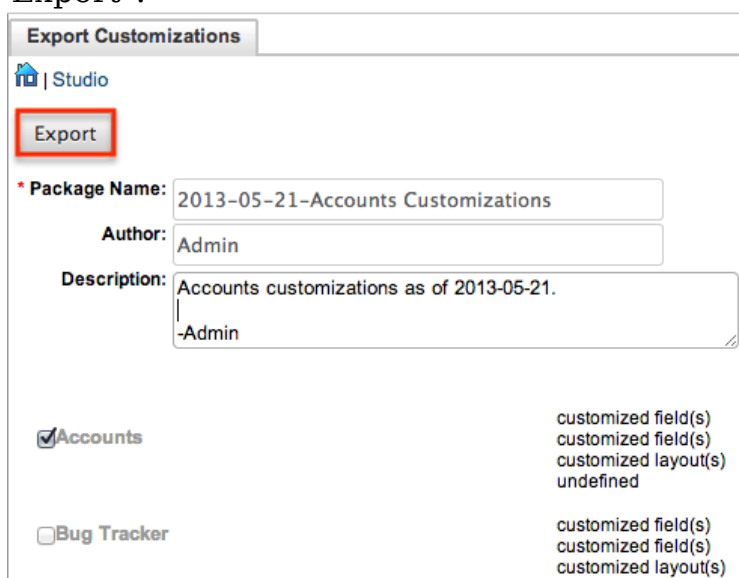
Sugar allows you to export a module's customized layouts, fields, and field labels from one Sugar instance to import into another Sugar instance. To do this, you will need to package the customizations in Studio, export it to your local machine, and then upload it into another Sugar instance. The system applies the customizations to the appropriate layouts, fields, and field labels.

Use the following steps to export you customizations via Studio:

1. From the Studio home page, select "Export Customizations" in the Main Panel.



2. Enter appropriate values in the following fields. All required fields are marked with a red asterisk and must be completed prior to saving.
Package Name : Enter the name of the package to be displayed during installation.
Author : Enter the name of the author creating the package to be displayed during installation.
Description : Enter a description of the export to be displayed during installation.
3. Select at least one module to include in the customization export and click "Export".



4. The customizations are saved to your computer in a zip file that can then be loaded into a different instance of Sugar via the module loader. For more information regarding installing packages, please refer to the [Module Loader](#)

Last Modified: 04/20/2017 01:30pm

Module Builder

Overview

Module Builder enables administrators to create, deploy, and maintain custom modules in Sugar. Modules can be created in Module Builder and then deployed within your instance of Sugar or exported for additional development and deployment to other instances of Sugar. This is convenient for testing new modules

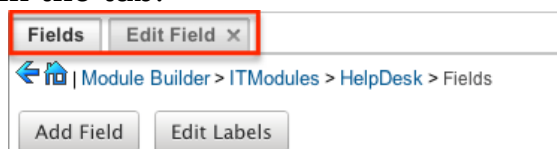
and for distributing a module to many different instances. Module Builder is available only to administrative users and these users can access the feature by going to Admin > Module Builder. This documentation will cover how to use Module Builder as well as the various actions and options available from within Module Builder.

Navigation

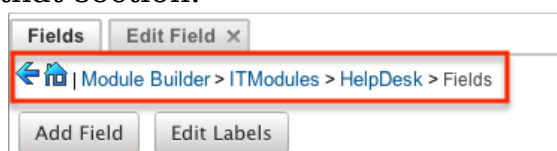
Module Builder's navigation is different than other modules within Sugar. Module Builder is divided into three main sections which consist of the main panel, packages panel, and footer.

Main Panel

The main panel in Module Builder is where selected information will be displayed and editable. When selecting items throughout Module Builder, they will open inside tabs within the main panel. Additional tabs can be closed by clicking the "X" in the tab.



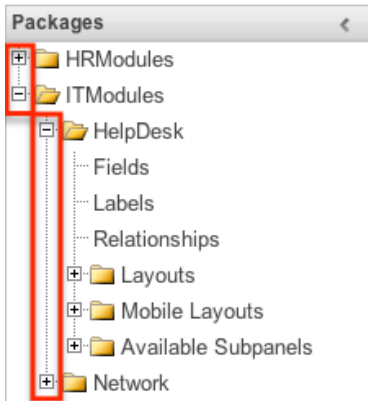
The main panel also includes a breadcrumb bar showing where in Module Builder you currently are. Select any level in the breadcrumb bar to navigate instantly to that section.



You may also click the Left arrow to go back one page, or the Home icon to navigate to the homepage of the Developer Tools.

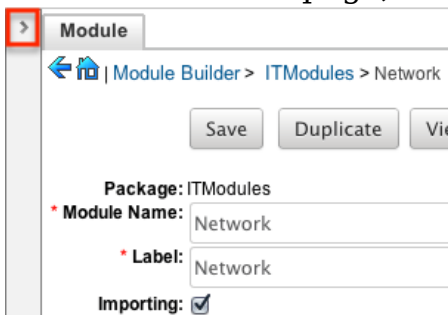
Packages Panel

The Packages panel is located on the left side of Module Builder and displays a list of existing packages custom modules inside those packages that are editable through Module Builder. The associated modules are grouped under a package and the fields, labels, layouts, and subpanels for each module are grouped within the module. Click the plus sign (+) preceding the package name to expand the package to see the associated items.



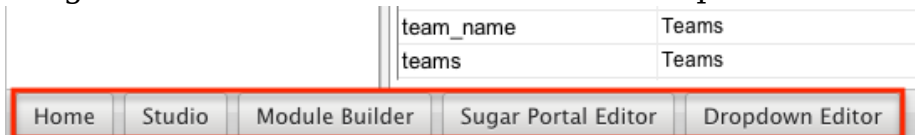
Select an item in the packages panel to load it into the main panel.

If you do not see the packages panel, it may be collapsed. Locate the gray bar on the left side of the page, and click the right arrow to expand the packages panel.



Footer

The footer is located at the bottom of Module Builder and contains buttons to navigate to different sections of the Developer Tools.



The options in the footer allow you to navigate to the following locations:

Menu Item	Description
Home	Navigates to the home page of the Developer Tools
Studio	Navigates to the home page of Studio
Module Builder	Opens Module Builder to create or edit modules
Dropdown Editor	Opens the Dropdown Editor to modify dropdown options

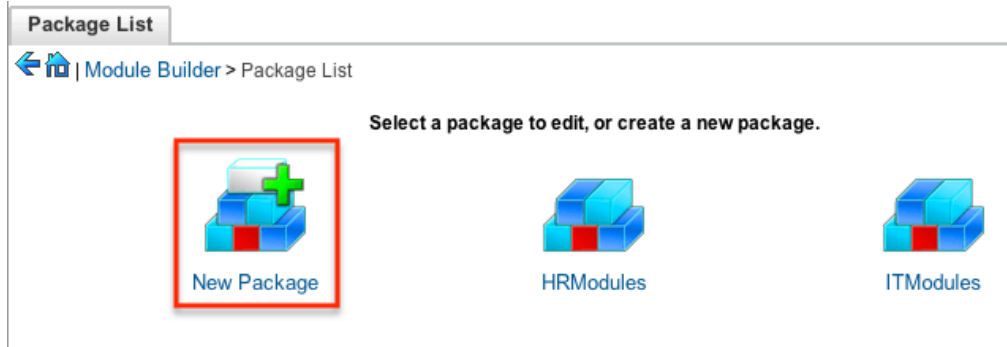
Packages

Packages can contain many different modules or different types. While packages can be useful to group similar or dependent modules together to ensure they are deployed together it is generally recommended to have a separate package for each module. This can prevent some potential headaches down the road and allows greater flexibility in the future if a module is no longer needed. In order to create a module through Module Builder, you must first create a package.

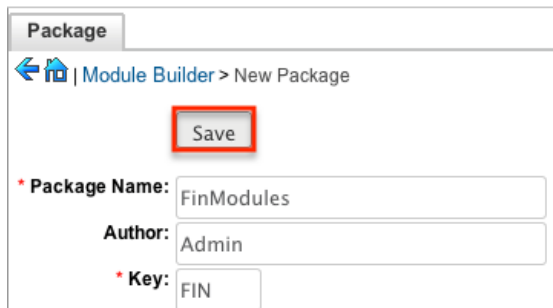
Creating Packages

Use the following steps to create a new package via Module Builder:

1. In the Main Panel, navigate to the Home Page for Module builder and click "New Package".

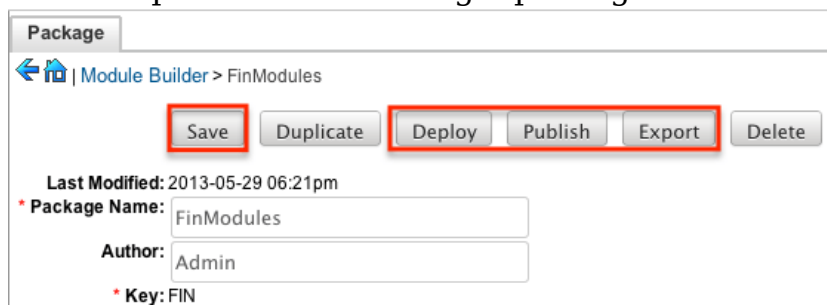


2. Enter appropriate values for the following fields:
 - Package Name : The name or designation of the package. The package name is what displays in the Packages Panel and in Module Loader when installing packages.
 - Author : The author who is creating the package. The author displays in Module Loader when installing packages.
 - Key : The key is an alphanumeric text to distinguish modules with similar names. The system will prefix all class names, directories, and table names with this key.
 - Description : A description or other information about the package.
 - Readme : Click the arrows next to "readme" to open the readme field. Enter additional information about the package or modules contained in the package.All required fields are marked with a red asterisk and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".



Deploying Packages

Packages in Module Builder can be saved and distributed via the action buttons in the main panel while viewing a package.



The options allow you to perform the following operations:

Action	Description
Save	Click "Save" to preserve any changes to the Package Name or Author fields.
Deploy	Installs the package into the current instance. Any modules in the package will be created or updated in the current instance. Note : Any workflows, code level customizations, or changes made through Studio to the custom modules after they were deployed will be lost when redeploying. It generally is recommended to delete the module package from Module Builder after a successful deploy and use Studio to perform any additional configurations to your module to avoid this scenario.
Publish	Saves the package into an installable zip file. Upload the file through Module Loader to install the package into an instance.

Export	Saves the package into an importable zip file. Upload the file through Module Loader to view the package in Module Builder on a different instance where it can then be further developed and deployed.
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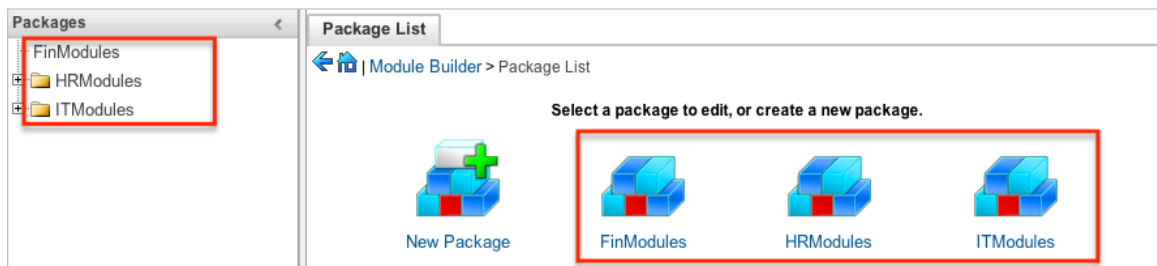
Deleting Packages

If a package is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from Module Builder. Deleting a package will delete all files contained in the package, but will not remove the package from any instances the package was deployed to. For more information on how to uninstall a deployed package from an instance, please refer to the [Module Loader](#) documentation in the Administration guide.

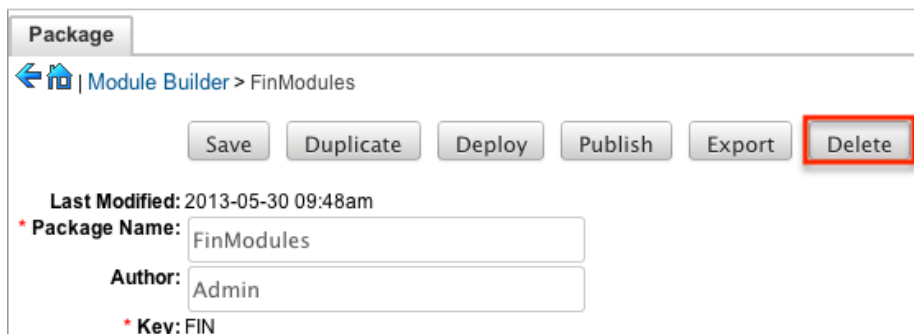
Note : We recommend deleting packages from Module Builder after they have been deployed in a production instance to prevent it from accidentally being redeployed. The only exception to this rule is in a development environment as you may want to continue working and testing until you are ready to move the module to your production environment.

Use the following steps to delete a package via Module Builder:

1. Select the desired package from the Packages panel, or the home page of Module Builder in the Main Panel.



2. Click "Delete".



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

Modules

Modules can be created within packages through Module Builder. While you can create many different modules of different types within a package, it is generally recommended to only have one module per package. This can prevent some potential headaches down the road and allows greater flexibility in the future if a module is no longer needed.

Module Types

Module Builder comes with a few predefined module templates for creating modules. Select the module type that best fits the business use of the new module and then customize the module to further suit your needs.

The following module types are available by default in Module Builder:

Type	Description
Basic	Generic module with only the most basic fields defined by default. All other module types build on top of the basic module type.
Company	Contains fields designed for company, account, or organization type records. Includes billing and shipping addresses, email address, phone numbers, industry, website, and more.
File	Contains fields designed for file upload or document records. Includes category, expiration date, status, filename, and more.
Issue	Contains fields designed for bug, issue, or case record types. Includes issue number, status, priority, work log, and more.
Person	Contains fields designed for people, contacts, or lead records. Includes first and last name, primary and alternate addresses, email addresses, phone numbers, and more.
Sale	Contains fields designed for sales, transactions, or opportunities. Includes, amount, currency, probability, sales stage, and more.

Module Options

When creating or modify modules in Module Builder, there are some options you can set the following options for the module:

- **Module Name** : The name or designation of the module. The module name is what displays in the Packages Panel as well as in Studio after deploying.
- **Label** : The name to display the module as. The label is what displays when using the module within Sugar.
- **Importing** : Select this option to enable the module to allow importing records.
- **Team Security** : Select this option to allow the module to be used with team security. If this option is unchecked, records in this module will not be assigned to a team and will be restricted on Role memberships only. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentations in the Administration guide.
- **Navigation Tab** : Select this option to add the module and module actions to the navigation bar.
- **Type** : Select the type of module to base this module off of. The module types include a template of fields that will be included in the module by default. Fields can be added and removed as necessary. You can only select the type when creating a module. For more information regarding the module types, please refer to the [Module Types](#) section in this document.

Creating Modules

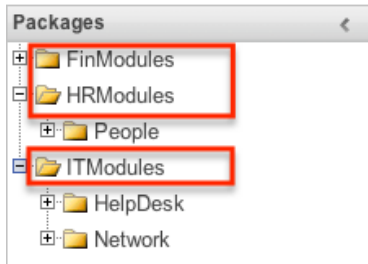
While you can create many different modules of different types within a package, it is generally recommended to only have one module per package. This can prevent some potential headaches down the road and allows greater flexibility in the future if a module is no longer needed.

Creating Modules Via Package

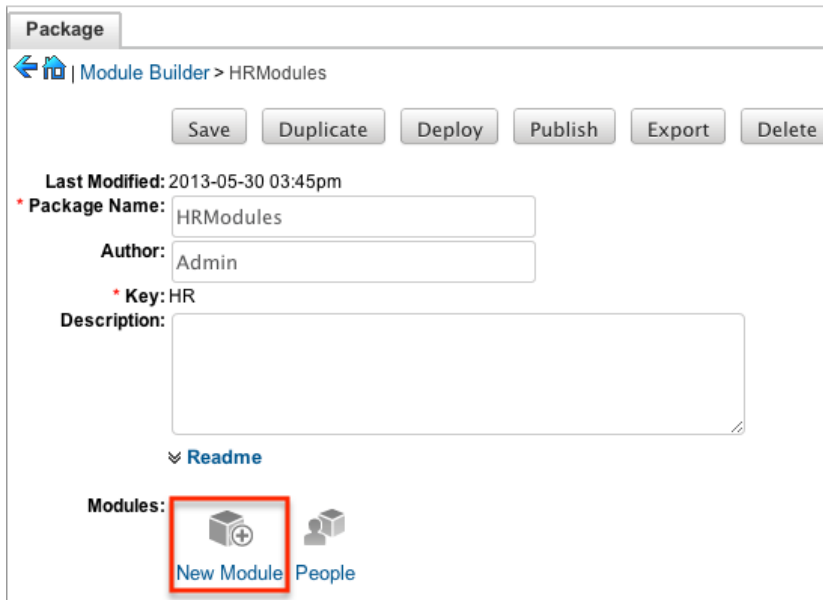
One of the most common methods of module creation is via the New Module option in the package. This opens up the New Module screen which allows you to enter in all the relevant information for the module.

Use the following steps to create a module via the package:

1. Select a package from the Packages Panel to create a new module in.

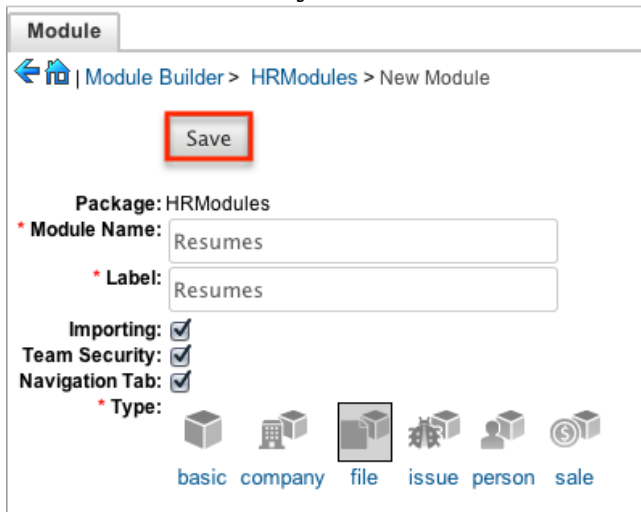


2. In the Main Panel, select "New Module".



3. Enter appropriate values for the [Module Options](#) . All required fields are marked with a red asterisk and must be completed prior to saving.

4. Once the necessary information is entered, click "Save".

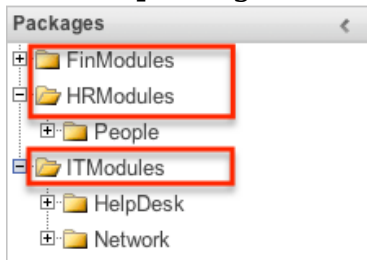


Creating Modules Via Duplication

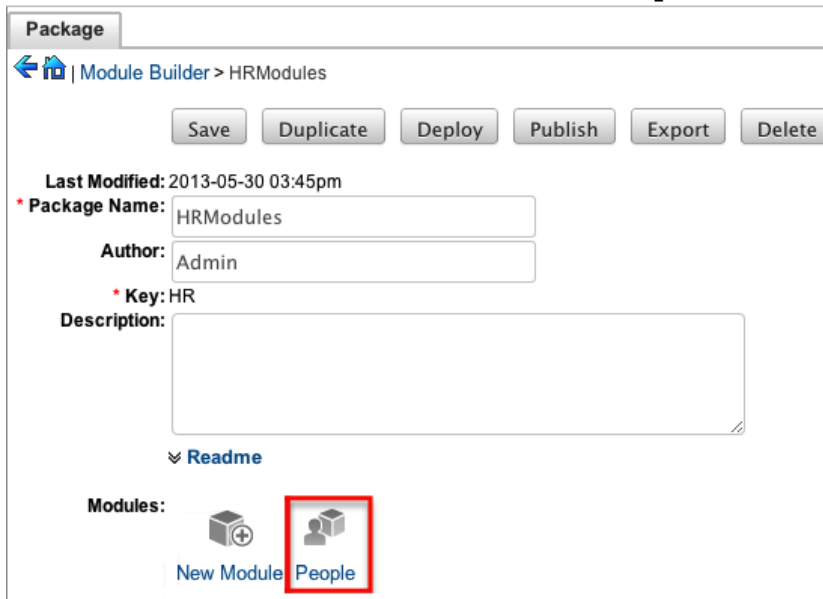
You can also create a new module by duplicating an existing module within a package. The duplicate option is useful if the module you are creating has similar information or structure to an existing module.

Use the following steps to create a module by duplicating an existing module:

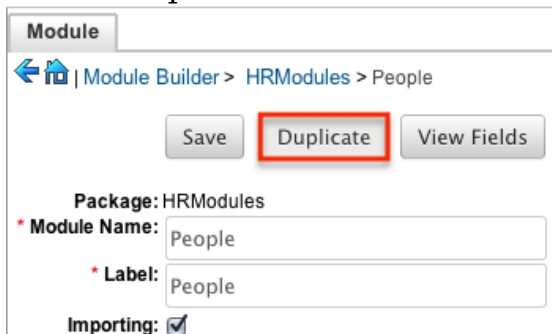
1. Select a package from the Packages Panel to create a new module in.



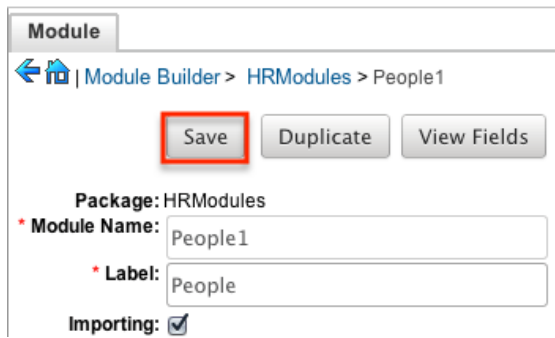
2. In the Main Panel, select a module to duplicate.



3. Select "Duplicate".

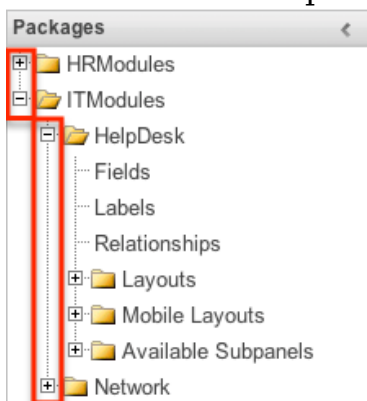


4. The selected module is duplicated to a new module with a one appended on the end of the module name. Update the necessary fields, then click "Save".



Modifying Modules

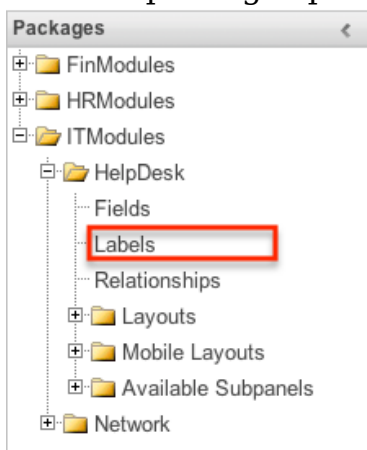
Modules can be modified within a package including the associated fields, labels, layouts, and subpanels for each module. Click the plus sign (+) preceding the module name to expand the module to see the associated items.



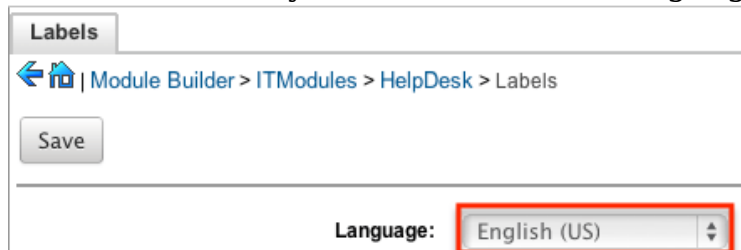
Select a module in the Packages panel to load it into the main panel. From here you can modify the [Module Options](#) for the selected module.

Modifying Labels

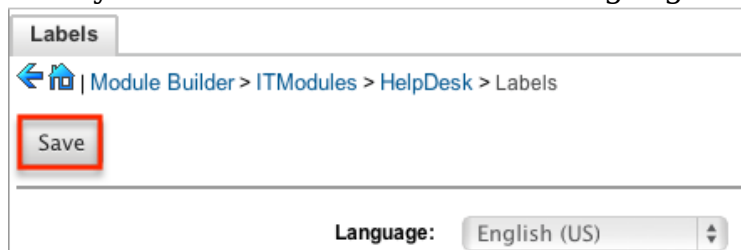
Labels are used throughout Sugar for items like buttons, field headers, subpanel titles, error messages, and more. To modify the labels for a module, select "Labels" from the packages panel under the desired module.



The Labels tab will open up in the main panel. Here you can specify labels for all language packs currently installed. Select the desired language from the dropdown to view and modify the labels for that language.

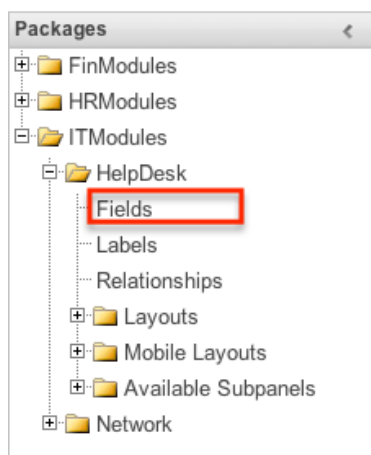


Modify the labels for the selected language and click "Save" to save your changes.



Fields

The fields section in Module Builder allows administrators to create new fields as well as change properties on existing fields within a module. To access the fields section in Module Builder, select "Fields" from the packages panel under the desired module.



The Fields tab will open up in the main panel.

Field Types

Sugar comes with many different types of fields to cover a variety of abilities. Each data type has certain options and properties to configure. The following fields are available to be added to modules in Module Builder:

Data Type	Description
Address	Creates fields for street, city, postalcode, state, and country. Note : Custom address fields cannot be grouped together like the stock address fields.
Checkbox	Creates a checkbox for data fields with a Yes/No action.
Currency	Creates a field to enter a currency value. The system automatically creates a dropdown of the currency type if the field does not already exist in that module.
Date	Creates a field to enter a date. Includes a button for a calendar popup.
DateTime	Creates a field to enter the date and time. Includes a button for a calendar popup as well as dropdowns for the time.
Decimal	Creates a field to hold a number rounded to a specified decimal precision. Sugar stores the exact representation of the number in the database (e.g. For a precision of 2: 1.236 is stored as 1.24).
DropDown	Creates a field that you can associate with a dropdown list of values.
Encrypt	Creates a field for sensitive information, such as social security numbers, whose value is to be encrypted in the Sugar database. The value is encrypted in the database but is visible in the user interface to users.
Float	Creates a field to hold a number rounded to a specified decimal precision. Sugar stores the value differently based on the database platform Sugar is running on.
HTML	Creates static HTML-formatted text to display in record views.
IFrame	Creates a field to store or generate a URL to display an iFrame in record

	views.
Image	Creates an image field to upload an image to display on a record.
Integer	Creates a field to specify positive or negative numbers with no decimal places.
MultiSelect	Creates a dropdown list of values where multiple values can be selected.
Flex Relate	Creates a dropdown list from which you can relate a single record from a variety of modules. Only one Flex Relate field is allowed per module. If the module already has a Flex Relate field, this option does not display in the Data Type dropdown list.
Phone	Creates a field to enter a phone number.
Radio	Creates a radio button for a user to select one value from a dropdown list.
Relate	Creates a field to associate a record with another module's record as a one-way relationship. You can add multiple Relate fields to a module. Note : Relate fields and custom relationships are independent of each other. Changes made to either one are not reflected in the other. Relate fields can be added to a report, but any data on the related record cannot be accessed in the report. To access related record data in a report you will need to create a custom relationship.
TextArea	Creates a large field for multiple lines of text.
TextField	Creates a field for a single line of text.
URL	Creates a field to store or generate a URL and displays as a link.


Field Options

Fields provide ways to store different data types in Sugar. While many fields come with Sugar by default, there can be instances where your organization needs to

store additional data.

When creating or modifying fields through Module Builder, there are some properties that exist across all field types, and there are some that are unique to only a few types. The following properties and options are available in Sugar:

- **Audit** : Select this checkbox to log when this field is changed per record. Users can view the audit via "View Change Log" from the detail view. The Audit option is available for all data type fields.
- **Border** : Select this checkbox to add a border around the image for this field. The Border option is only available for Image data type fields.
- **Calculated Value** : Select this checkbox to designate this field as a calculated field. This opens up the Formula option and disables the Default Value and Importable options. For more information regarding entering a formula for a calculated value, please refer to the Formula option listed in this section.

Calculated Value: 

Formula:

The result of the formula will be entered into the field for any new or modified records. When selecting this option, the field value cannot be modified by users.

The Calculated Value option is only available for the following data type fields:

Checkbox	Currency
Date	Datetime
Decimal	Encrypt
Float	Integer
Phone	TextArea
TextField	

Columns : Enter the number of columns to specify the width of a TextArea data type field.

The Columns option is only available for TextArea data type fields.

Comment Text : Enter comments or documentation about the field. Only viewable through Module Builder and Studio.

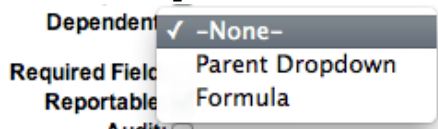
The Comment Text option is available for all data type fields except Flex Relate.

Default Value : Specify or select a default value for this field when a record is created. Default values for the record are populated by default on the edit view layout, but can be modified by users.

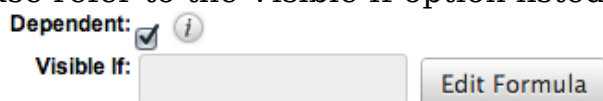
The Default Value option is available for all data type fields except HTML, Image, Flex Relate, and Relate.

Dependent : Select this option to designate this field as being dependent on a

formula or a parent dropdown. For DropDown data type fields you can select "Parent Dropdown" or "Formula" for the dependency.



Selecting "Parent Dropdown" will open the Parent Dropdown option listed below. Selecting "Formula" will open the Visible If option. For other field data types, select the Dependent checkbox to open the Visible If option. For more information regarding entering a formula to make a dependent field visible, please refer to the Visible If option listed in this section.



The Dependent option is available for all data type fields except Address.

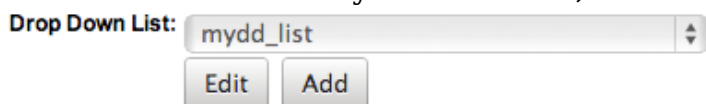
Disable Format : Select this checkbox to disable number formatting such as the thousands separator.

The Disable Format option is only available for Integer data type fields.

Display Label : Enter a value to display as the field label and header in layouts. This value is also modifiable in the packages panel under [Labels](#) . Defaults to the Field Name entered.

The Display Label option is available for all data type fields except Flex Relate. Flex Relate uses the Label Value option.

Drop Down List : Select a list of values to use for the field. Only values in the list will be available to be selected for the field. Click "Edit" to change the values for the currently selected list, or click "Add" to create a new list.



The Drop Down List option is only available for the following data type fields:

DropDown	MultiSelect
Radio	

For more information on editing dropdown values via the Dropdown Editor, please refer to the [Editing Dropdown Lists](#) section of the Developer Tools documentation in the Administration guide.

Duplicate Merge : Select one of the following options to determine the field's functionality when records are being merged:

- **Disabled :** Selected by default. The field will not appear in the Merge Duplicates feature, and will not be available to use for the filter conditions in the Find Duplicates feature.
- **Enabled :** The field will appear in the Merge Duplicates feature, but will not be available to use for the filter conditions in the Find Duplicates feature.
- **In Filter :** The field will appear in the Merge Duplicates feature, and will also be available in the Find Duplicates feature.

- **Default Selected Filter** : The field will be used for a filter condition by default in the Find Duplicates page, and will also appear in the Merge Duplicates feature.
- **Filter Only** : The field will not appear in the Merge Duplicates feature, but will be available in the Find Duplicates feature.
The Duplicate Merge option is available for all data type fields except Image.

Enable Range Search : Select this checkbox to allow range searches to be performed on this field. For more information on how to use ranged searches, please refer to the [Advanced Search](#) section of the Search documentation in the Application guide.

The Enable Range Search option is only available for the following data type fields:

Currency	Date
Datetime	Float
Integer	

Field Name : Enter in the name of the field being created. Once a field has been created the field name cannot be changed. Field names can contain only alphanumeric characters as well as the underscore character.

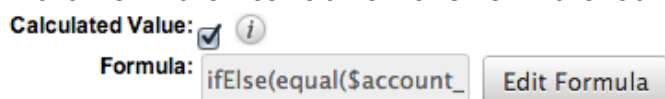
The Field Name option is required for all data type fields.

Full Text Searchable : Select a boost level for indexing this field for Full Text Searching. Disabled indicates the field will not be indexed by the Full Text engine. Fields with a higher boost level will be given greater weight when a search is performed, making the matching values appear higher in the search results. If you change the boost level for a field from one level to another, be sure to perform a system index deleting the existing data to apply the change. For more information regarding Full Text Search, please refer to the [Search](#) documentation in the Application guide.

The Full Text Searchable option is only available when Full Text is enabled and for the following data type fields:

Decimal	Float
Integer	TextArea
URL	TextField

Formula : Contains the current formula to return a calculated value. Click "Edit Formula" to launch the formula builder to change the formula.



For more information on how to build a formula using the formula builder,

please refer to the [Using Sugar Logic](#) section in this document.

The Formula option is only available when the Calculated Value option is selected.

Generate URL : Select this checkbox to allow variables from the current module to be placed into the Default Value option for creating dynamic URLs. This is useful for providing links or iFrames to internal systems such as an ERP or to external systems such as Google Maps.

Generate URL:

billing_address_postalcode

Default Value:

Select the desired field to add from the dropdown and click "Insert Field" to add the field to the Default Value. When selecting this option, the field value cannot be modified by users.

The Generate URL option is only available for the following data type fields:

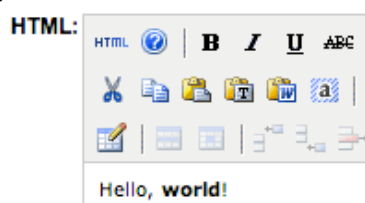
IFrame	URL
--------	-----

Height : Enter the number of pixels to vertically scale the image for this field. Enter only the Width or Height options to retain the aspect ratio of the image. The Height option is only available for Image data type fields.

Help Text : Enter in basic instructions for populating this field. The text entered here will display to users when they hover their mouse over this field in the edit view.

The Help Text option is available for all data type fields.

HTML : Enter in static rich text with formatting or HTML code to display on a record.



For more information on how to use the text editor please refer to the [TinyMCE](#) section of the User Interface document in the Application guide.

The HTML option is only available for HTML data type fields.

IFrame Height : Enter the number of pixels for the height of the IFrame field. The width of the IFrame field is always the width of the field container.

The IFrame Height option is only available for IFrame data type fields.

Importable : Select one of the following options to determine the field's functionality when records are being imported:

- Yes : The field can be included in an import operation.
- No : The field cannot be included in an import.
- Required : A value for the field must be provided in any import.

Label Value : Enter a value to display as the field label and header in layouts.

This value is also modifiable in the packages panel under [Labels](#) . Defaults to "Flex Relate".

The Label Value option is only available for Flex Relate data type fields.

Mass Update : Select this checkbox to add this field as an option to mass update.

The Mass Update option is only available for the following data type fields:

Date	Datetime
DropDown	MultiSelect
Radio	

Max Size : Enter the maximum amount of characters allowed for this field. Defaults to 255.

The Max Size option is only available for the following data type fields:

Address	Decimal
Float	Iframe
Integer	Phone
URL	TextField

Max Value : Enter the highest value allowable for this field. If a user attempts to enter a value for this field higher than what is specified here, they will get a prompt showing the range of acceptable values.

The Max Value option is only available for Integer data type fields.

Min Value : Enter the lowest value allowable for this field. If a user attempts to enter a value for this field lower than what is specified here, they will get a prompt showing the range of acceptable values.

The Min Value option is only available for Integer data type fields.

Module : Select a module from the dropdown to relate the current module to. A module can relate back to itself, a good example of this would be a relate field on Contacts to relate back to Contacts for a referred by field. This will allow users to select which contact record referred a different contact. The module cannot be modified after creation.

Module:

The Module option is only available for Relate data type fields.

Open Link In : Select one of the following options to determine how a URL will open:

- New Window : Opens the URL in a new Tab or Window depending on your browser and settings.
- Same Window : Opens the URL in the same window as the record you are currently browsing.

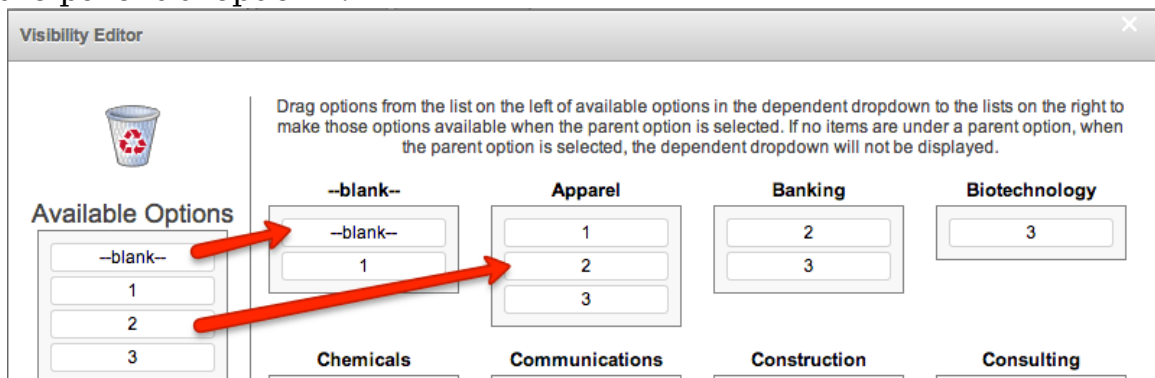
The Open Link In option is only available for URL data type fields.

Parent Dropdown : Select an option from the dropdown to specify the parent that controls the visibility of this dropdown field. The Parent Dropdown option is populated with the other dropdown data type fields in the current module.

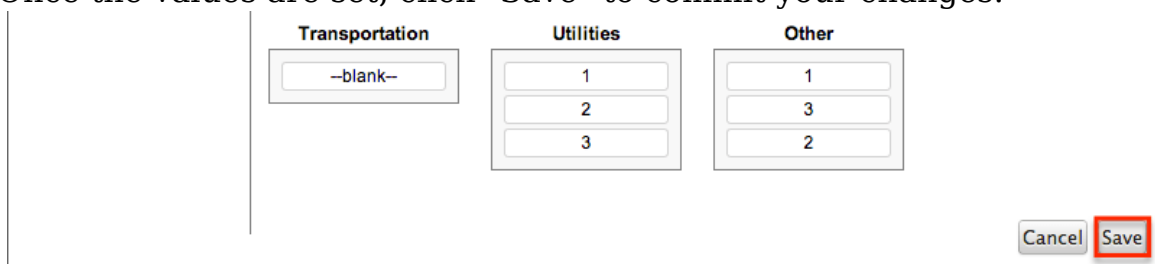
Dependent:

Parent Dropdown:

Click "Edit Visibility" to specify which options are available from the current dropdown for each value of the parent dropdown. In the Visibility Editor window, drag values from the current dropdown list to the value sections of the parent dropdown.



This will determine which options in the dropdown list are available when the parent dropdown is set to the specified value. In this example, if the parent dropdown is set to "Apparel", then the current dropdown will have options 1, 2, and 3 where if the parent dropdown is set to "Banking", then the current dropdown will only have options 2 and 3 available. If there are no available options for a parent dropdown value, then the dropdown will not be visible at all. To remove an item, drag it from the value to the Trash bin on the left. Once the values are set, click "Save" to commit your changes.



The Parent Dropdown option is only available when the Dependent option has "Parent Dropdown" selected.

Precision : Enter a number to specify the number of digits to the right of the decimal point the value should be stored as.

The Precision option is only available for the following data type fields:

Decimal	Float
---------	-------

Reportable : Select this checkbox to allow this field to be used in reports. The Reportable option is available for all data type fields except Encrypt, Flex Relate, HTML, IFrame, Image.

Required Field : Select this checkbox to make the field required to be populated before saving a record. The user will be prompted to enter a non-blank value for the field upon saving.

The Reportable option is available for all data type fields except Checkbox and HTML.

Rows : Enter the number of rows to specify the height of a TextArea data type field.

The Rows option is only available for TextArea data type fields.

System Label : Enter the system value for storing the label of the field. This is defaulted to the name of the field preceded with "LBL_". Any lowercase characters entered will be converted to uppercase upon saving. Once the field has been created the system label cannot be changed.

Note : It is recommended to avoid naming multiple fields the same System Label as they will then all share the same label and header value in layouts.

The System Label option is available for all data type fields.

Visible If : Contains the current formula to determine if a field is visible on the layout or not. Click "Edit Formula" to launch the formula builder to change the formula.

Dependent: ⓘ

Visible If:

The formula must result in a Boolean (true/false) response. For more information on how to build a formula using the formula builder, please refer to the [Using Sugar Logic](#) section in this document.

The Visible If option is only available when the Dependent option is checked or "Formula" is selected from the dropdown.

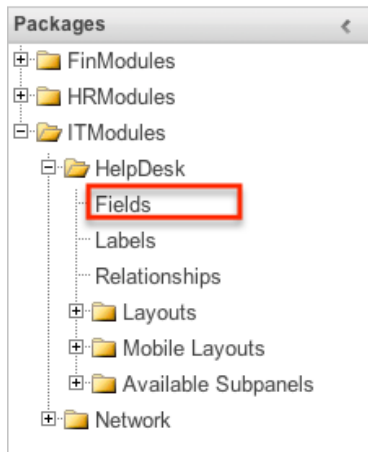
Width : Enter the number of pixels to horizontally scale the image for this field. Enter only the Width or Height options to retain the aspect ratio of the image.

The Width option is only available for Image data type fields.

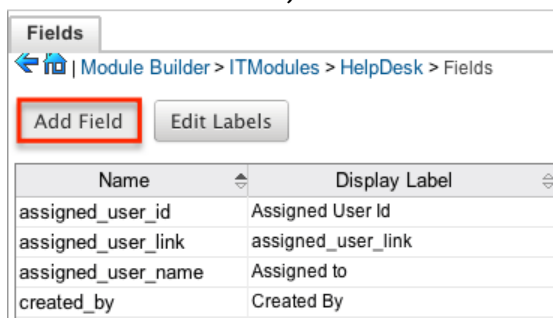
Creating Fields

Use the following steps to create a new field via Module Builder:

1. Expand out the tree under the desired module in the Packages Panel, and select "Fields".

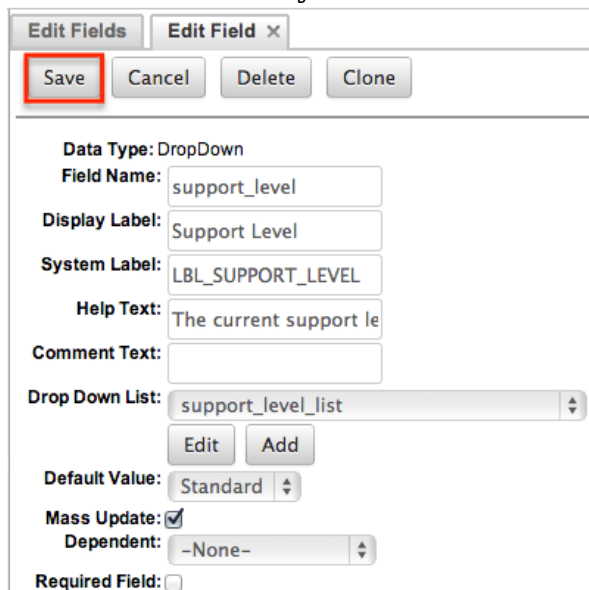


2. In the Main Panel, click "Add Field".



3. Enter appropriate values for the [Field Options](#) . Field Name is required.

4. Once the necessary information is entered, click "Save".



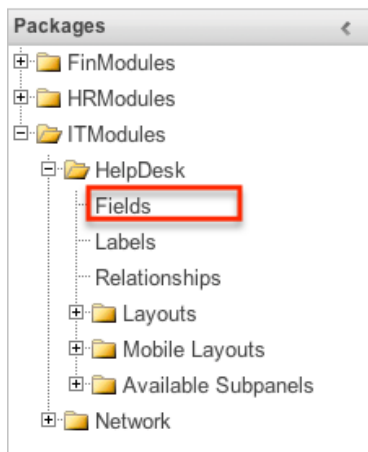
5. After creating a field it must be placed on the edit layout before users will be able to enter data into that field. For more information on editing layouts, please refer to the [Editing Layouts](#) section in this document.

Editing Fields

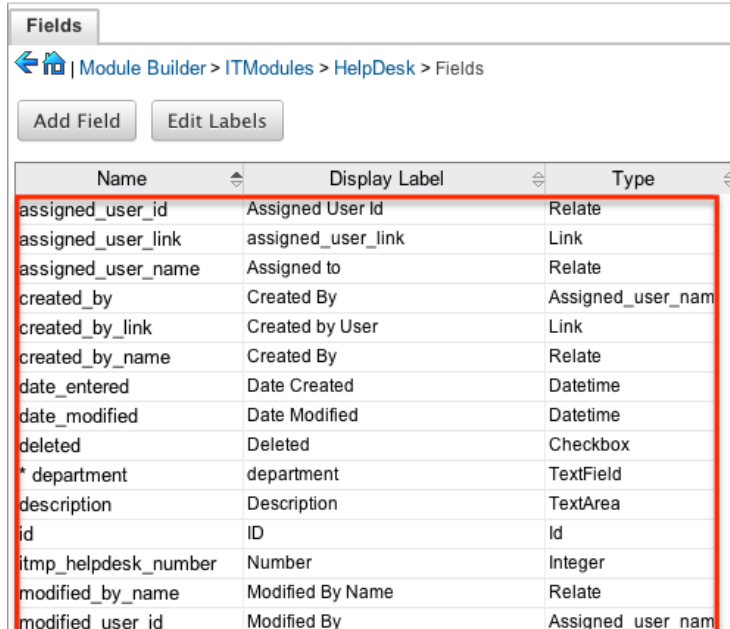
Use the following steps to edit an existing field via Module Builder:

1. Expand out the tree under the desired module in the Packages Panel, and

select "Fields".

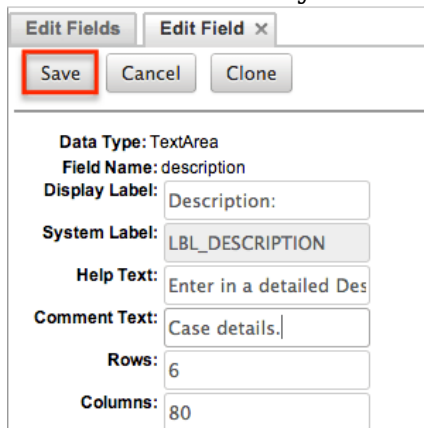


2. In the Main Panel, select a field to edit. Click the column headers to sort the grid by different columns to assist in locating the field.



Note : Fields created via Module Builder will show with an asterisks next to their names.

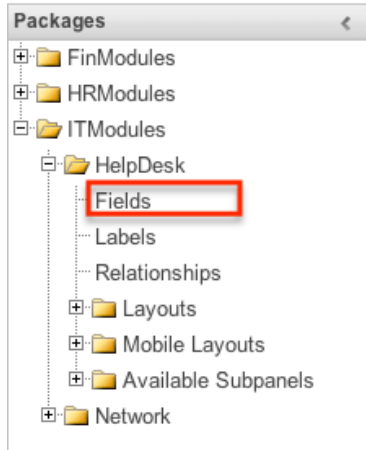
3. Enter appropriate values for the [Field Options](#) .
4. Once the necessary information is entered, click "Save".



Deleting Fields

Use the following steps to delete an existing field via Module Builder:

1. Expand out the tree under the desired module in the Packages Panel, and select "Fields".

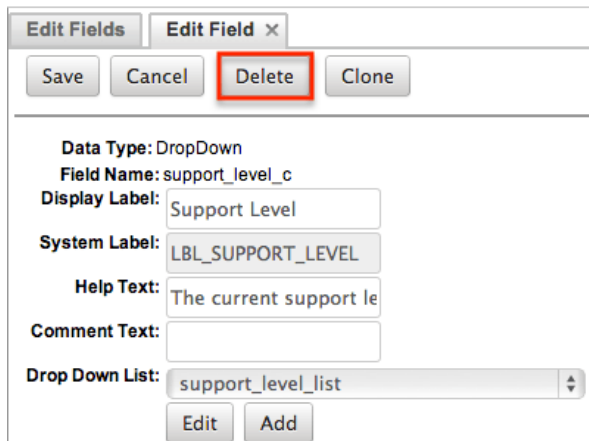


2. In the Main Panel, select a field to delete. Click the column headers to sort the grid by different columns to assist in locating the field.

Name	Display Label	Type
assigned_user_id	Assigned User Id	Relate
assigned_user_link	assigned_user_link	Link
assigned_user_name	Assigned to	Relate
created_by	Created By	Assigned_user_name
created_by_link	Created by User	Link
created_by_name	Created By	Relate
date_entered	Date Created	Datetime
date_modified	Date Modified	Datetime
deleted	Deleted	Checkbox
* department	department	TextField
description	Description	TextArea
id	ID	Id
itmp_helpdesk_number	Number	Integer
modified_by_name	Modified By Name	Relate
modified_user_id	Modified By	Assigned_user_name

Note : Fields created via Module Builder will show with an asterisks next to their names. Fields added by the module type template cannot be deleted.

3. Select "Delete".



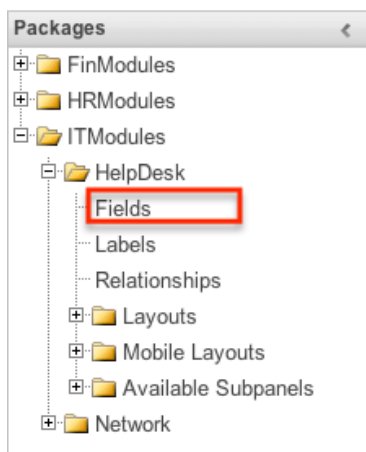
4. A pop-up message will display asking for confirmation. Click "Ok" to proceed. Before deleting a field please verify and resolve the following issues:
 1. Field must be removed from any report filters or displays.
 2. Field must be removed from any workflows that filters or displays the field.
 3. Field must be removed from any dashlet that filters or displays the field.
 4. Field must be removed from any Sugar Logic formulas.
 5. Field must be removed from any email templates.
 6. Field must be removed from any saved searches.
5. The field will automatically be removed from any module layouts when deleted.

Note : When deleting fields in a module and redeploying the package, the data related to the field in the database will not be removed.

Cloning Fields

Use the following steps to clone an existing field via Module Builder:

1. Expand out the tree under the desired module in the Packages Panel, and select "Fields".



2. In the Main Panel, select a field to delete. Click the column headers to sort the grid by different columns to assist in locating the field.

Fields

Module Builder > ITModules > HelpDesk > Fields

Add Field Edit Labels

Name	Display Label	Type
assigned_user_id	Assigned User Id	Relate
assigned_user_link	assigned_user_link	Link
assigned_user_name	Assigned to	Relate
created_by	Created By	Assigned_user_name
created_by_link	Created by User	Link
created_by_name	Created By	Relate
date_entered	Date Created	Datetime
date_modified	Date Modified	Datetime
deleted	Deleted	Checkbox
* department	department	TextField
description	Description	TextArea
id	ID	Id
itmp_helpdesk_number	Number	Integer
modified_by_name	Modified By Name	Relate
modified_user_id	Modified By	Assigned_user_name

Note : Fields created via Module Builder will show with an asterisks next to their names.

3. Select "Clone"

Edit Fields Edit Field x

Save Cancel Delete Clone

Data Type: DropDown
Field Name: support_level_c
Display Label: Support Level
System Label: LBL_SUPPORT_LEVEL
Help Text: The current support le
Comment Text:
Drop Down List: support_level_list

Edit Add

Note : Some non-standard stock fields (e.g. Name) do not have the ability to clone.

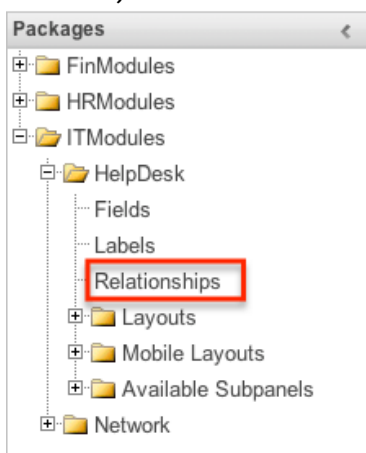
4. Enter appropriate values for the [Field Options](#) .

5. Once the necessary information is entered, click "Save".

Relationships

Relationships define the links between different modules in Sugar and allow records between those modules to be related. Related records display in fields or subpanels on a module's detail page depending on the relationship type. When you create a new relationship between two modules, the system automatically creates the necessary subpanels, related fields, and metadata relationships. Relationships provide the added benefit in reports to allow access to a related records fields in addition to the base module's fields.

The relationships section in Module Builder allows administrators to create new relationships between custom and stock modules as well as change some properties on existing relationships. To access the relationship section in Module Builder, select "Relationships" from the packages panel under the desired module.



The module's relationship tab will open up in the main panel.

Note : Any relationships created through Module Builder will not be able to be deleted in Studio after being deployed. It is recommended to create relationships in Studio after deploying instead of via Module Builder provided you follow the

best practices of never redeploying a module from Module Builder.

Relationship Types

Sugar contains a few different types of relationships you can create between modules. The relationship type will determine what fields or tables will be created in the database as well as what interface the user will see to manage the relationship.

The following relationship types are available in Module Builder:

- **One to One** : Records in the primary module and the related module are uniquely related to each other. For a One to One relationship between Accounts and Contacts, an account can be associated with only one contact and a contact can be associated with only one account. The relationship will show as a field in each module's detail view where changing the relationship from either module will also change the value in the other module.

From the Primary Module Account :

Contacts:	Robert Smith
-----------	------------------------------

From the Related Module Contact :

Accounts:	SugarCRM Inc
-----------	------------------------------

Note : You can create a one way relationship between modules using relate fields. For more information regard relate fields, please refer to the [Field Types](#) section in this document.

- **One to Many** : Records in the primary module can have relationships with many records in the related module. For a One to Many relationship between Accounts and Contacts, an account can be associated with many contacts, but each contact can be associated with only one account. The detail view of the primary module will display a subpanel for the related module, and the detail view of the related module will display a field containing a link to the related record.

From the Primary Module Account :

^ Contacts

Create ▾
Name ⇅
Robert Smith
Jim Smith

From a Related Module Contact :

Accounts:	SugarCRM Inc
-----------	------------------------------

Note : A One to Many relationship is the same as a Many to One relationship except the Primary and Related modules are reversed.

- Many to Many : Records in both the primary module and the related module can have multiple records related in each module. For a Many to Many relationship between Accounts and Contacts, an account can be associated with many contacts, and a contact can be associated with many accounts. Both module's detail views will display a subpanel for the opposite module. From the Primary Module Account :

⤴ **Contacts**

Create ▾
Name ⇅
Robert Smith
Jim Smith

From a Related Module Contact :

⤴ **Accounts**

Create ▾
Acct. Name ⇅
SugarCRM Inc
PlanEx

Note : Only modules with subpanels available can be on the "Many" side of a relationship. For example, the Product Catalog module lacks a subpanel; therefore, Product Catalog can only be selected on the "One" side of a relationship.

When you create a relationship for a module, the selected module is considered to be the primary module and the module that you relate it with is the related module.

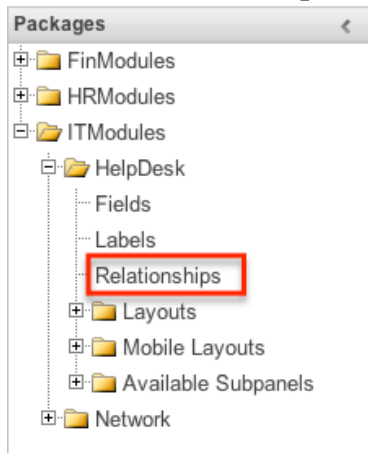
You can also create a relationship between a module and itself. In this case, the relationship becomes a parent-child relationship. For example, you can create a relationship from Accounts to Accounts in order to create sub-accounts within the primary account.

Creating Relationships

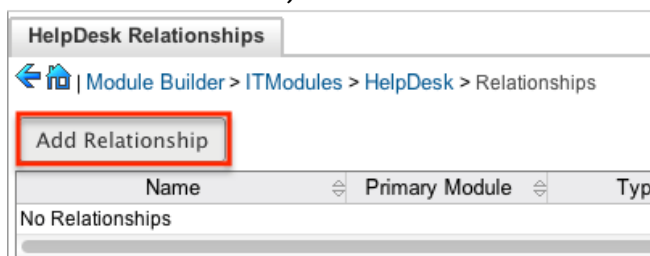
Use the following steps to create a new relationship via Module Builder:

1. Expand out the tree under the desired module in the Packages Panel, and

select "Relationships".



2. In the Main Panel, click "Add Relationship".



3. Enter appropriate values for the following options:

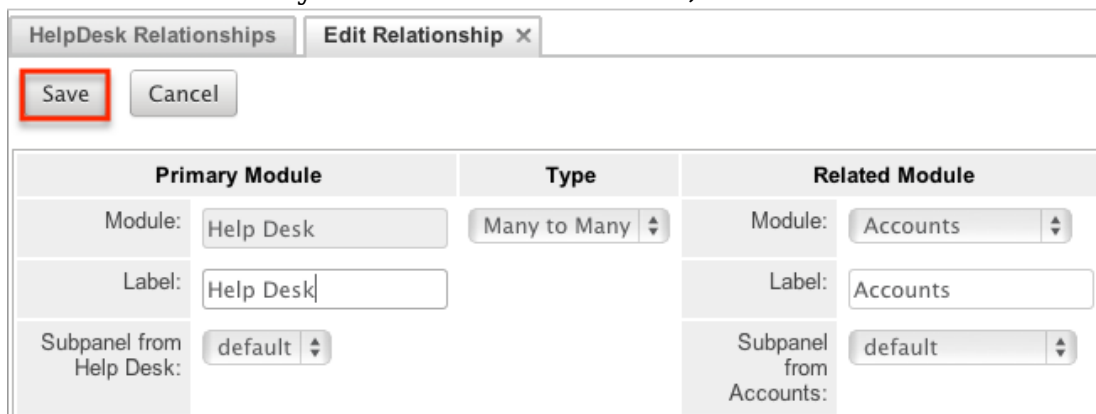
Type : Select the type of relationship to create from the options in the [Relationship Types](#) section.

Module : The Primary module is set to the module you are adding the relationship to. Select the Related module from the dropdown. The Primary and Related module can be the same in order to create a parent child relationship.

Label : Enter a label to reference the Primary module or Related module's subpanels for this relationship. This option is only available for the "Many" side of a relationship.

Subpanel from : Select a subpanel option to display the Primary or Related module's records in. This will determine the fields displayed in the subpanel. This option is only available for the "Many" side of a relationship.

4. Once the necessary information is entered, click "Save".



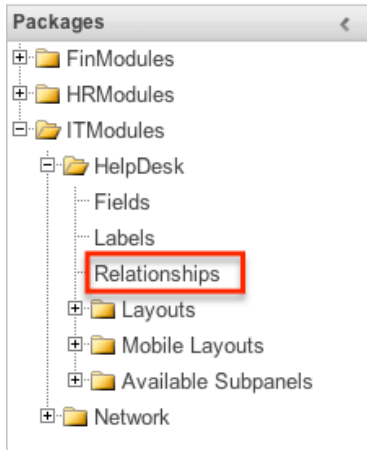
5. The required fields and subpanels are instantly created and saved in the

package.

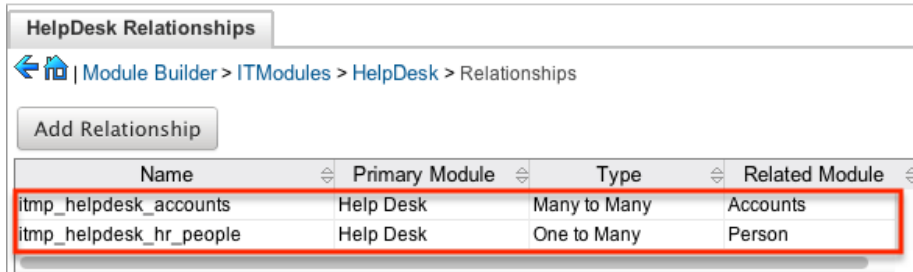
Editing Relationships

Use the following steps to edit a relationship via Module Builder:

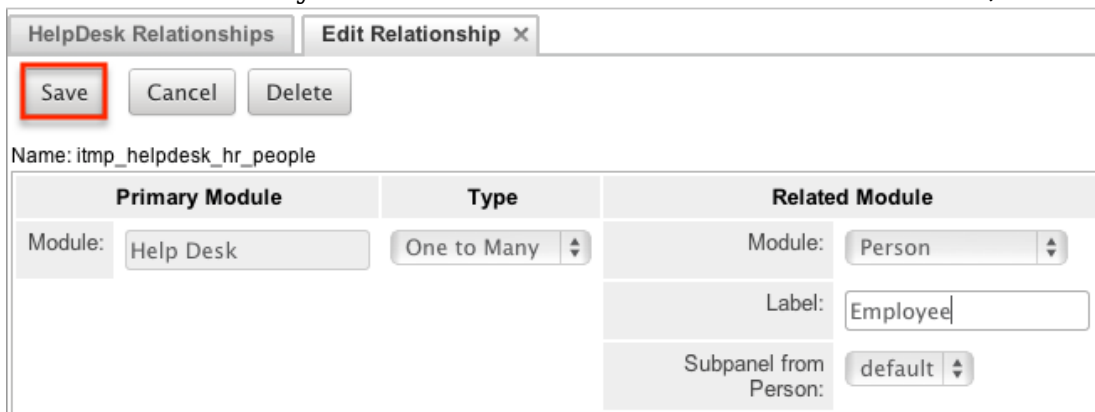
1. Expand out the tree under the desired module in the Packages Panel, and select "Relationships".



2. In the Main Panel, select a relationship to edit. Click the column headers to sort the grid by different columns to assist in locating the relationship.



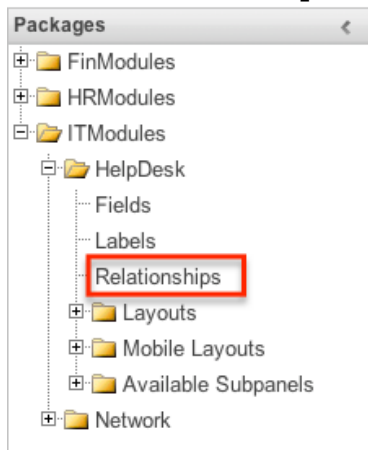
3. The only field modifiable on a relationship is the Label field for naming the Primary or Related modules subpanels. This option is only available for the "Many" side of a relationship.
4. Once the necessary information for the Label field is entered, click "Save".



Deleting Relationships

Use the following steps to delete a relationship via Module Builder:

1. Expand out the tree under the desired module in the Packages Panel, and select "Relationships".



2. In the Main Panel, select a relationship to delete. Click the column headers to sort the grid by different columns to assist in locating the relationship.

The screenshot shows the 'HelpDesk Relationships' grid. The grid has four columns: Name, Primary Module, Type, and Related Module. Two rows are highlighted with a red rectangular box: 'itmp_helpdesk_accounts' (Help Desk, Many to Many, Accounts) and 'itmp_helpdesk_hr_people' (Help Desk, One to Many, Person). There is an 'Add Relationship' button above the grid.

Name	Primary Module	Type	Related Module
itmp_helpdesk_accounts	Help Desk	Many to Many	Accounts
itmp_helpdesk_hr_people	Help Desk	One to Many	Person

3. Select "Delete".

The screenshot shows the 'Edit Relationship' dialog box. The 'Delete' button is highlighted with a red rectangular box. The dialog displays the relationship details for 'itmp_helpdesk_hr_people'. The 'Primary Module' is 'Help Desk', the 'Type' is 'One to Many', and the 'Related Module' is 'Person'. The 'Label' is 'Employee' and the 'Subpanel from Person' is 'default'.

Primary Module	Type	Related Module
Module: Help Desk	One to Many	Module: Person
		Label: Employee
		Subpanel from Person: default

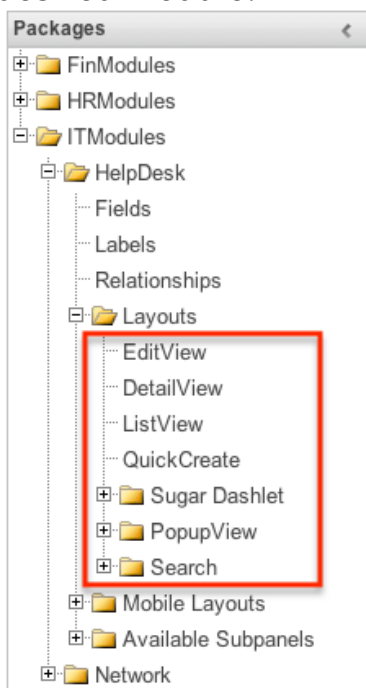
4. A pop-up message will display asking for confirmation. Click "Yes" to proceed. If you would like to retain the data and table structure that currently exists for the relationship, select the "Do Not Remove Tables" option. Please note that leaving the "Do Not Remove Tables" unchecked will delete the relationship data and remove the tables for the relationship from the database when the package is installed.

Note : Before deleting a relationship please verify and resolve the following issues:

1. Relationship must be removed from any report filters or displays.
2. Relationship must be removed from any workflows that filters or displays fields from the relationship.
3. Relationship must be removed from any Sugar Logic formulas referencing the relationship.

Layouts

Layouts are used to represent many screens in Sugar. The layouts section in Module Builder allows administrators to add fields and configure layouts. To access the layouts section, expand "Layouts" from the packages panel under the desired module.



The available layouts for the selected module will appear.

Layout Types

Sugar comes with different types of layouts to represent different sections of Sugar. Not all layouts are available in every module. The following layouts are available in Sugar:

- Edit View : Edit view layout is used in Sugar to modify or create records in the specified module.
- Detail View : Detail view is used in Sugar to view the current data for a record

within the specified module.

- **List View** : List view layout is used in Sugar to view multiple records within the specified module. The list view is also used for displaying the results from a Basic or Advanced search.
- **Quick Create** : Quick Create layout is used in Sugar to quickly view, edit, or modify records within the specified module via a popup window, which avoids navigating away from the current page. The quick create layout for a module can be accessed from many different locations throughout Sugar, including other modules.

The screenshot shows the 'Search Accounts' interface with a 'Quick Create' popup form. The popup form contains the following fields and options:

- Name:** SugarCRM Inc
- Website:** www.sugarcrm.com
- Email Address:** A text input field with a '+' button to add an email and a '-' button to remove one. To the right are radio buttons for 'Primary', 'Opted Out', and 'Invalid'.
- Industry:** Technology (dropdown menu)
- Assigned to:** Administrator (lookup field)

At the bottom of the popup are 'Save', 'Cancel', and 'Full Form' buttons.

- **Sugar Dashlet List View** : Sugar dashlet list view layout is used in Sugar to view multiple records in the dashlet for the specified module. This section allows administrators to include specific fields by default to dashlets, and allow other fields to be added by users to personalize their dashlet.

The screenshot shows the 'My Accounts' dashlet with a list view of account records. The table has the following columns and data:

Acct. Name	Website	Phone	Billing Country
SugarCRM Inc	www.sugarcrm.com	(408) 454-6900	United States

- **Sugar Dashlet Search** : Sugar dashlet search layout is used in Sugar to filter records in the dashlet for the specified module.

Filters

Only My Items

Date Created:

Industry:

Teams:

Type:

Billing Country:

Assigned to:

- **Popup List View** : Popup list view layout is used in Sugar to view multiple records in a popup window used to locate and select records in the specified module.

Account List

Acct. Name	City	State	Country	User
SugarCRM Inc	Cupertino	California	United States	Administrator

- **Popup Search** : Popup search layout is used in Sugar to allow users to search on records in the popup window used to select records in the specified module.

Account Search

Name:

Billing State:

Any Email:

Billing City:

Billing Country:

Assigned to:

- **Basic Search** : Basic search layout is used in Sugar to allow users to search on records in the basic search section on the list view of the specified module.

Search Accounts

Name: My Items My Favorites [Advanced Search](#)

- **Advanced Search** : Advanced search layout is used in Sugar to allow users to search on records in the advanced search section on the list view of the

specified module.

Search Accounts

The screenshot shows a search form for accounts. It has several input fields: Name (filled with 'Sugar'), Website, Any Phone, Any Email, Any Address, City, State, Postal Code, Country, Type (a list box with options: Analyst, Competitor, Customer, Integrator, Investor), Industry (a list box with options: Apparel, Banking, Biotechnology, Chemicals, Communications), and Assigned to (filled with 'Administrator Will Westin'). There is a 'My Favorites' checkbox and a 'my Int' dropdown menu set to 'Equals'. At the bottom, there is a 'Layout Options' section with a 'Save search as:' field, 'Save', 'Update', and 'Delete' buttons, and a 'Search' button.

Layout Options

Layouts in Sugar have more options than just positioning of fields. The following are some of the options Sugar administrators have when configuring layouts throughout Module Builder:

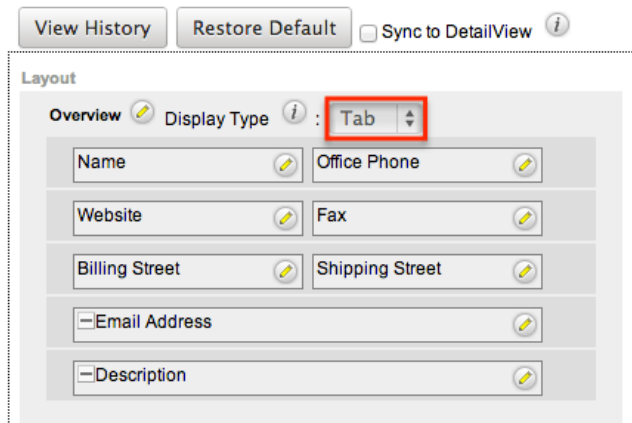
- **Panels** : Every field on a layout is contained within a panel. Panels can be open or collapsed by default and have a title defining the panel. Panels can be organized to contain groups of similar or related fields to assist in organization.

Select the Pencil icon next to the Panel title to modify the title. Select the Collapsed? checkbox to default the panel as collapsed. Users can open and close panels as the wish.

The screenshot shows the 'Layout' configuration interface. At the top, there are buttons for 'View History', 'Restore Default', and a 'Sync to DetailView' checkbox. Below that, the 'Layout' section is shown with a title 'Overview' and a 'Display Type' dropdown set to 'Panel'. A 'Collapse?' checkbox is checked. Below the title are several fields: Name, Office Phone, Website, Fax, Billing Street, Shipping Street, Email Address, and Description. Each field has a pencil icon for editing.

Note : The default panel name cannot be modified in Module Builder.

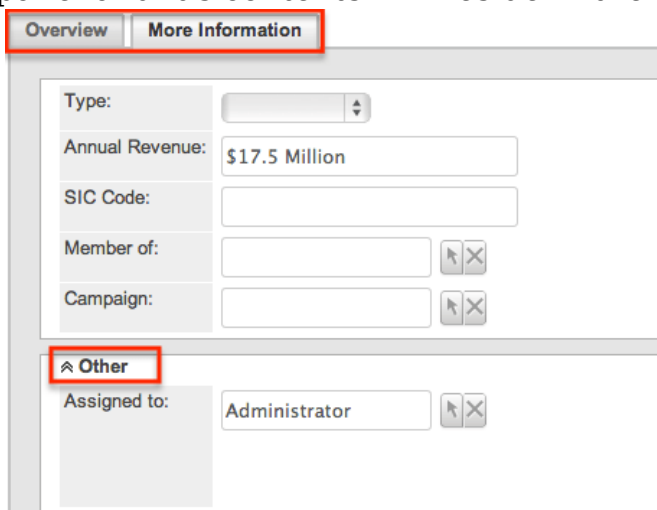
- **Tabs** : Panels can be displayed as Tabs inside a layout. You can also have panels nested inside of tab defined panels. Select "Tab" from the Display Type dropdown to display the panel as a tab.



Every panel listed underneath a Tab display type will be a panel within the tab until the next Tab display type panel is reached. For example, set the panels in the Accounts edit view layout to the following:

Panel Title	Display Type
Overview	Tab
More Information	Tab
Other	Panel

This will display two tabs, Overview and More Information and the Other panel and it's contents will reside in the More Information tab.



Layout History : Sugar keeps a history of the changes made to each layout. These changes and when they occurred can be viewed and restored via "View History". For more information on viewing the history of layouts, please refer to the [Viewing Layout History](#) section of this documentation.

Restore Defaults : Sugar also contains the ability to restore a layout to it's original default configuration. For more information on how to reset a layout to default, please refer to the [Restoring Layout Defaults](#) section in this

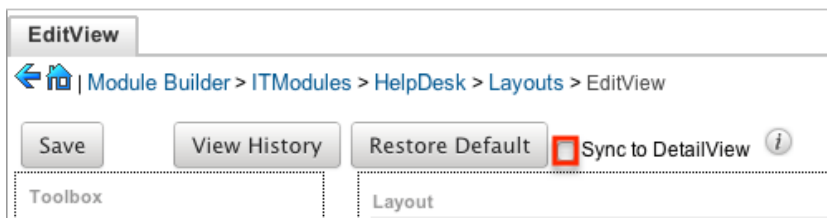
documentation.

Sync and Copy Layouts : Edit view layouts can be synced with detail view layouts to ensure the same fields exist in the same positions on both layouts. Alternately, the detail view and quick create layouts can be copied from the edit view layout. For more information on Syncing and Copying layouts, please refer to the section [Sync And Copy](#) below.

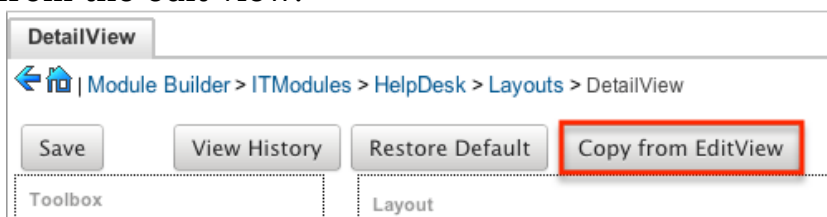
Sync And Copy

Sugar provides administrators with the ability to sync and copy certain layouts to assist in configuring layouts. Often it makes sense for a module's edit view and detail view layouts to be identical. Instead of having to duplicate any changes made to one layout, administrators can configure the detail view layout to be synced to the edit view layout.

To sync the layouts, select the Sync to DetailView checkbox on the edit view layout and click "Save".



The current detail view layout will be replaced with the current edit view layout. At this point, changes cannot be made to the detail view layout, but any changes made to the edit view will be automatically synced to the detail view when saved. Alternatively to syncing the layouts, administrators can copy the layout from the edit view to the detail view or the quick create layouts. This is especially useful if you want the layouts to be similar, but different. Make any changes necessary to the edit view layout, and then navigate to either the detail view or quick create layouts. Select "Copy from EditView" to replace the current layout with the details from the edit view.



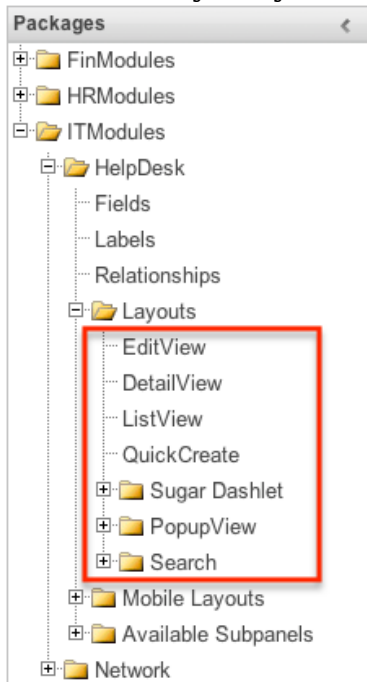
You can then continue to edit the layout as you wish.

Note : The copy feature is a one time copy of the layouts. Any future changes to the edit view layout will not be reflected on the layout copied to without performing the copy again.

Editing Layouts

Use the following steps to edit a layout via Module Builder:

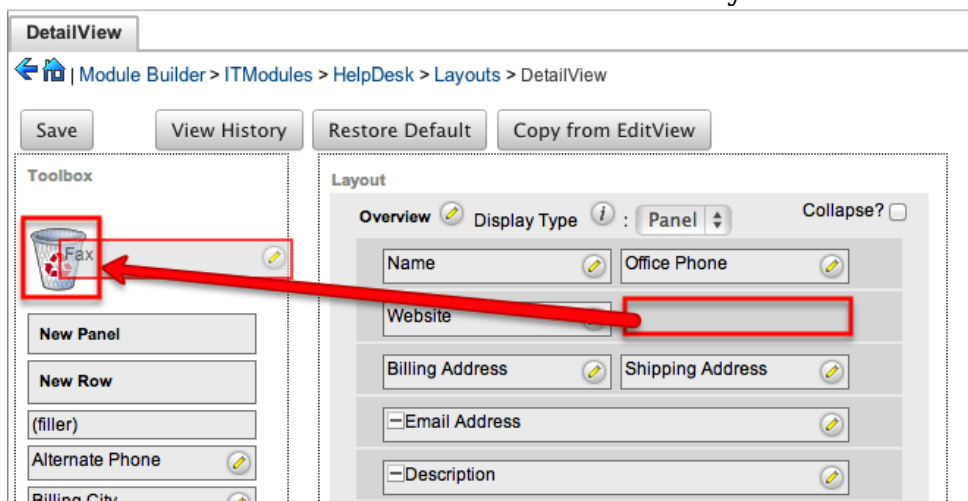
1. Expand "Layouts" from the Package Panel under the desired module, and select the layout you wish to edit.



The selected layout will display in the Main Panel.

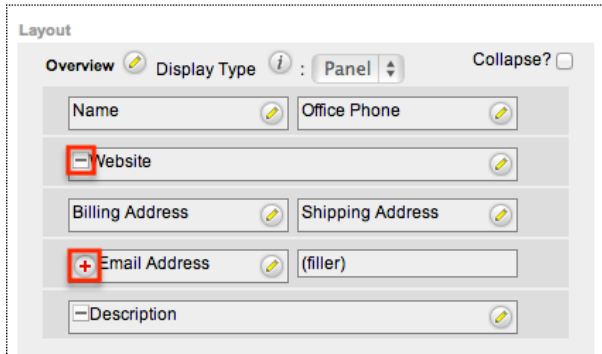
2. Optionally set and configure the [Layout Options](#) or perform the following actions to edit the layout:

Remove a Field from the Layout : Drag a field from the layout to the trash bin in the toolbox to remove the field from the layout.

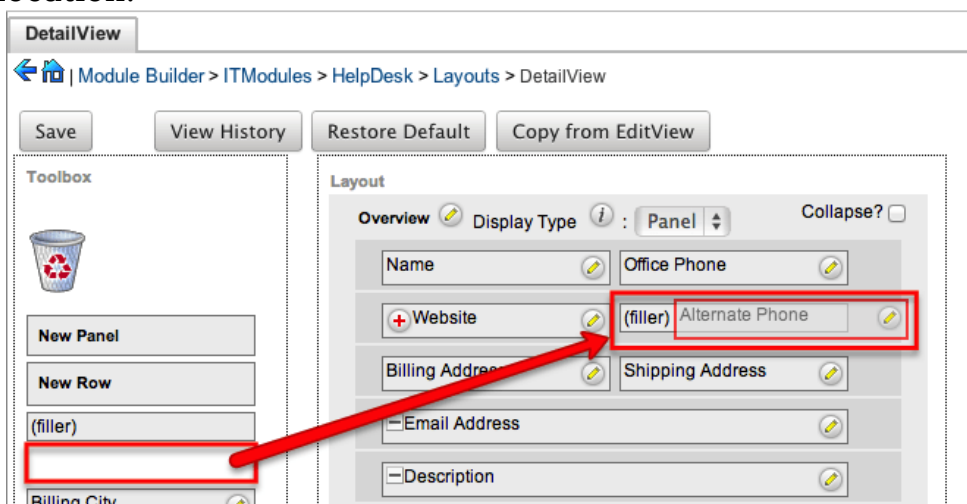


You may remove rows and panels through the same method.

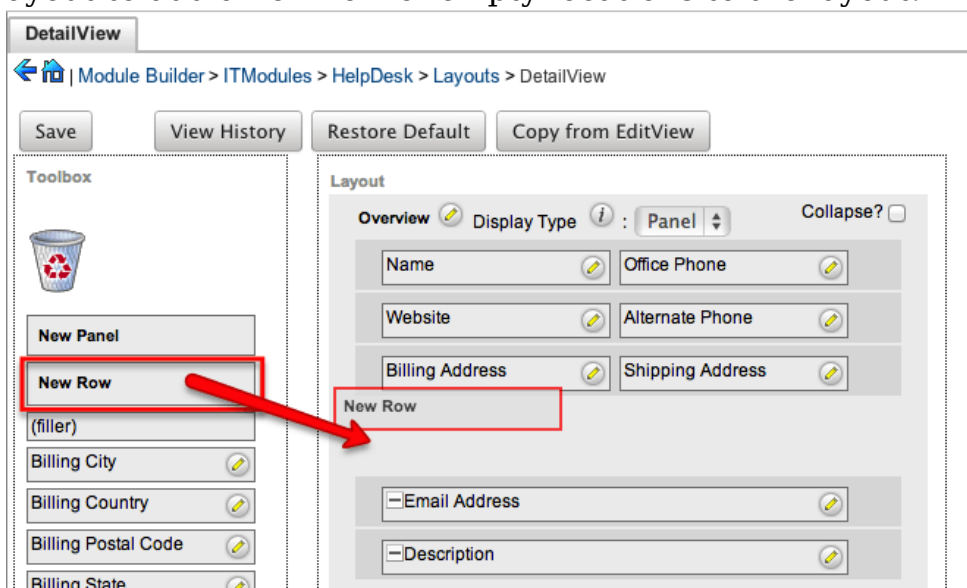
Expand or shrink the size of a Field : Click the plus icon (+) to expand a field to take both columns in the layout or click the minus icon (-) to shrink a field to only take one column.



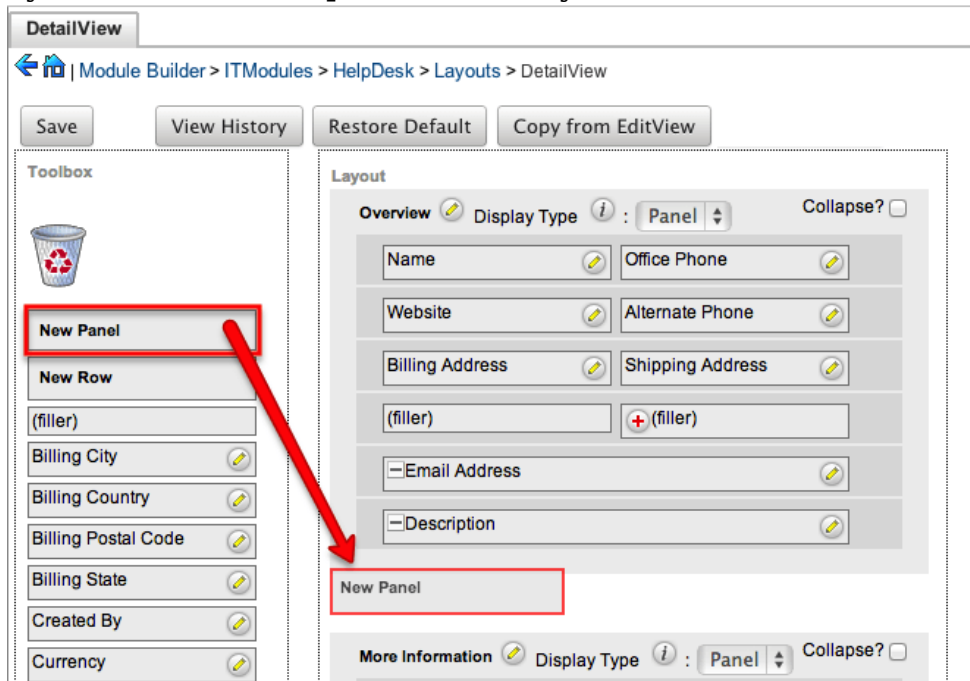
Areas with no field in its location will be referenced with the label "(filler)".
 Add a Field : Drag a field from the list of fields in the Toolbox to an empty location containing the "(filler)" label to add the field to the layout in that location.



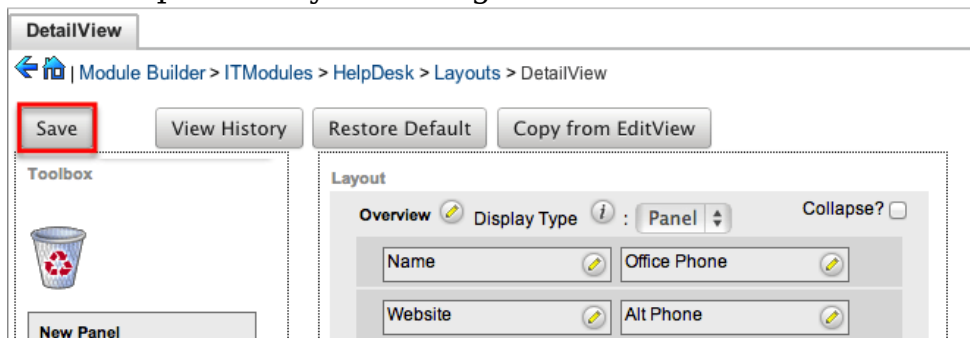
You can also drag a field from the list of fields in the Toolbox to a location that already has a field in it. The current field will automatically be moved to the Toolbox, and will be replaced on the layout with the field being dragged.
 Add a Row : Drag the "New Row" item in the Toolbox into a panel of the layout to add a new row of empty locations to the layout.



Add a Panel : Drag the "New Panel" item in the Toolbox into a section of the layout to add a new panel to the layout.



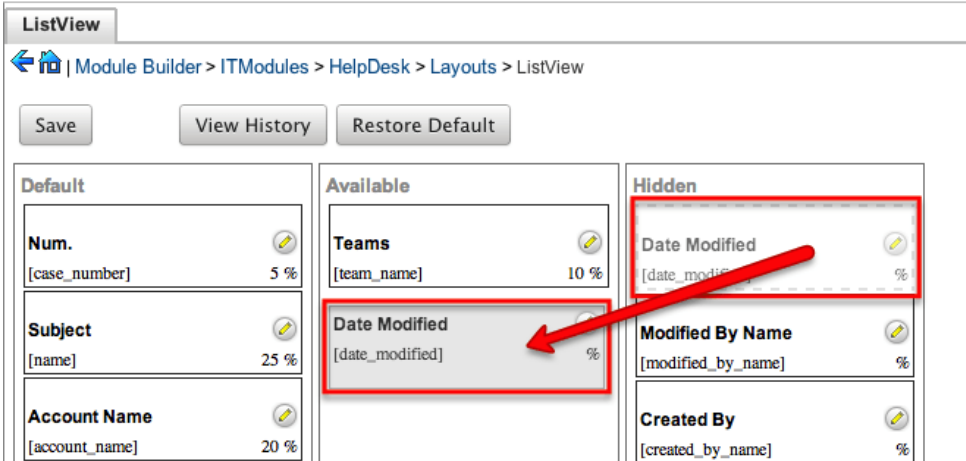
3. Once the necessary information for the layout has been configured, click "Save" to preserve your changes.



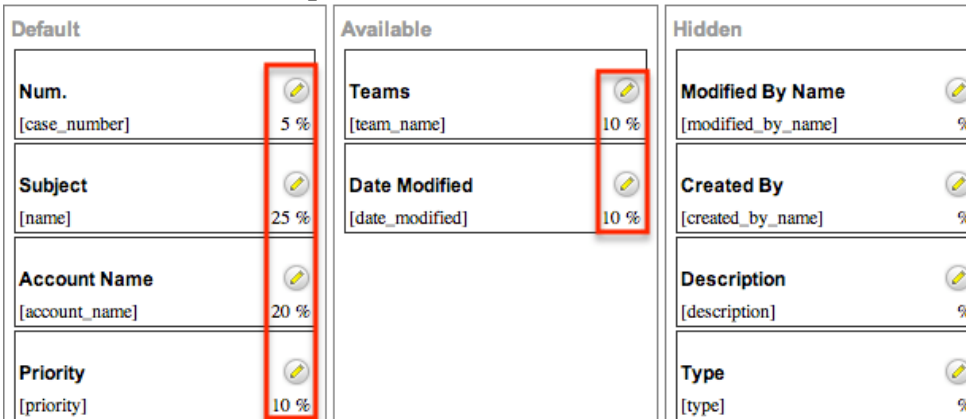
Some layouts in Sugar are configurable from a positional layout perspective, but some are more a list of available fields. Some examples of these types of layouts are list view, basic, and advanced search. Many of these layout types can be personalized for each user to display and hide certain fields. The list view type of layouts can contain up to three of the following sections to group fields into:

- Default : Default fields are the fields that will show by default in the layout.
- Available : Available fields are fields that will not show by default in the layout, but if the layout can be personalized, users can add these fields to their view of the layout. Not all list type layouts have an available fields section.
- Hidden : Hidden fields are fields that will not show in the layout and cannot be personalized to be added to their view of the layout.

Drag fields between these sections to set them accordingly.



Click the Pencil icon to modify the label of the field as well as the width percentage the field will take up in the list.

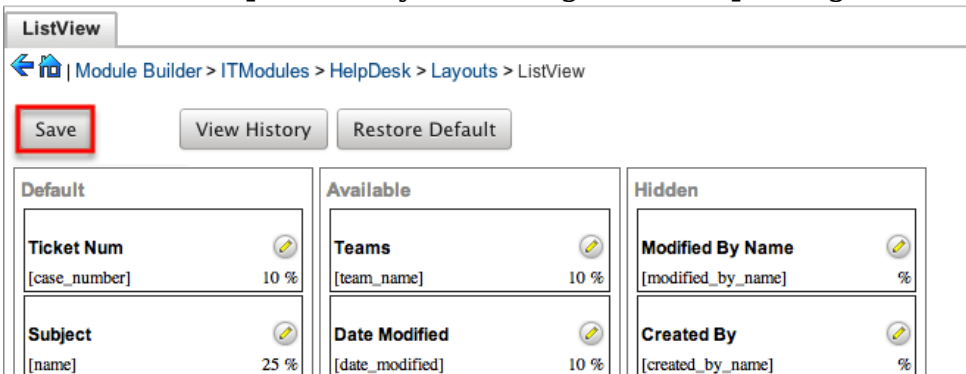


Edit the label or width percentage, and click "Save" to continue.

Note : Editing a field label on ListView layout will change that field's label in all ListView layouts.

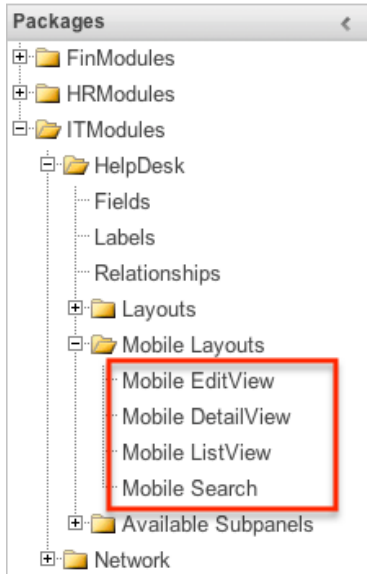


Click "Save" to preserve your changes to the package.



Mobile Layouts

Mobile layouts are used to represent the screens in SugarCRM Mobile. The mobile layouts section in Module Builder allows administrators to add fields and configure mobile layouts. To access the mobile layouts section in Module Builder, expand "Mobile Layouts" from the Packages Panel under the desired module.



The available mobile layouts for the selected module will appear.

Mobile Layout Types

Sugar comes with different types of mobile layouts to represent different sections of the mobile applications. Not all layouts are available in every module and the different mobile applications will use the information defined here differently. The following mobile layouts are available in Sugar:

- **Edit View** : Edit view layout is used in Sugar to modify or create records in the specified module.
- **Detail View** : Detail view is used in Sugar to view the current data for a record within the specified module. Certain fields are translated to SugarCRM Mobile as buttons instead of data. For example, instead of seeing the phone number, there is a phone icon to be able to call the number on the record.
- **List View** : List view layout is used in Sugar to view multiple records within the specified module. Only the first two fields in the list view section will be displayed in SugarCRM Mobile.
- **Search** : Search layout is used in Sugar to allow users to search on records in the specified module. This layout is not utilized by SugarCRM Mobile since that application fully utilizes your instance's full text search settings to generate results.

Mobile Layout Options

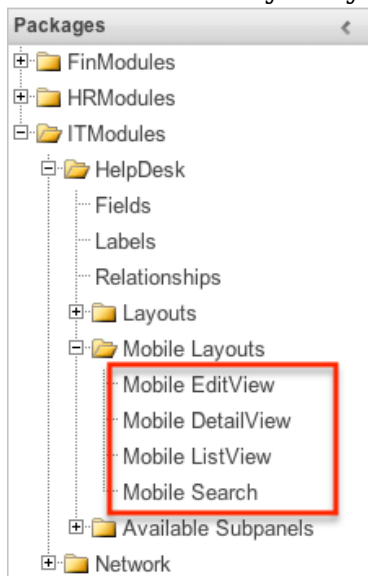
Mobile layouts in Sugar have more options than just positioning of fields. The following are some of the options Sugar administrators have when configuring mobile layouts throughout Module Builder:

- **Layout History** : Sugar keeps a history of the changes made to each layout. These changes and why they occurred can be viewed and restored via "View History". For more information on viewing the history of layouts, please refer to the [Viewing Layout History](#) section of this documentation.
- **Restore Defaults** : Sugar also contains the ability to restore a layout to its original default configuration. For more information on how to reset a layout to default, please refer to the [Restoring Layout Defaults](#) section in this documentation.

Modifying Mobile Layouts

Use the following steps to edit a mobile layout via Module Builder:

1. Expand "Mobile Layouts" from the Packages Panel under the desired module, and select the layout you wish to edit.



The selected mobile layout will display in the Main Panel.

2. Optionally set and configure the [Mobile Layout Options](#) or perform the following actions to edit the layout:

Remove a Field from the Layout : Drag a field from the layout to the trash bin in the toolbox to remove the field from the layout. You may remove rows through the same method.

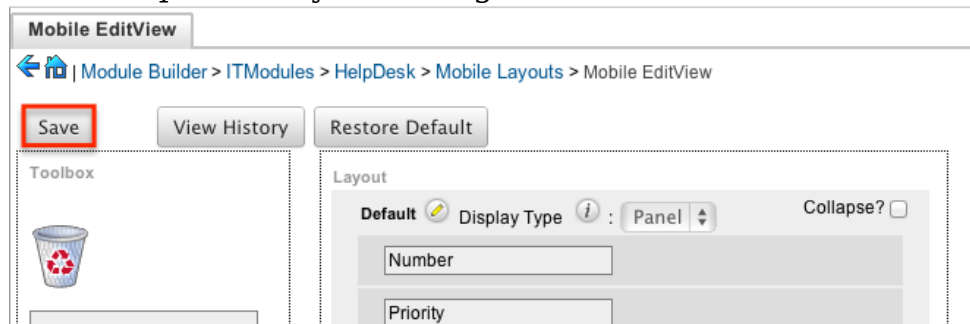
Areas with no field in its location will be referenced with the label "(filler)".

Add a Field to the layout: Drag a field from the list of fields in the Toolbox to an empty location containing the "(filler)" label to add the field to the layout in that location.

You can also drag a field from the list of fields in the Toolbox to a location that already has a field in it. The current field will automatically be moved to the Toolbox, and will be replaced on the layout with the field being dragged.

Add a Row to the Layout : Drag the "New Row" item in the Toolbox into a panel of the layout to add a new row with an empty location to the layout.

3. Once the necessary information for the layout has been configured, click "Save" to preserve your changes.



Some layouts in Sugar are configurable from a positional layout perspective, but some are more a list of available fields. Examples of these types of layouts are mobile list view and mobile search. Many of these layout types can be personalized for each user to display and hide certain fields. The list view type of layouts can contain up to three of the following sections to group fields into:

- **Default** : Default fields are the fields that will show by default in the layout.
- **Available** : Available fields are fields that will not show by default in the layout, but if the layout can be personalized, users can add these fields to their view of the layout. Not all list type layouts have an available fields section.
- **Hidden** : Hidden fields are fields that will not show in the layout and cannot be personalized to be added to their view of the layout.

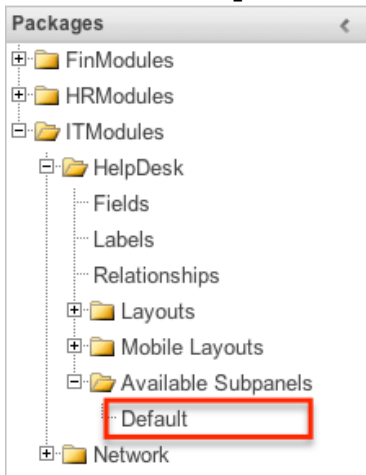
Drag fields between these sections to set them accordingly. Click the Pencil icon to modify the label of the field. Edit the label and click "Save" to continue.

Note : Editing a field label on ListView layout will change that field's label in all ListView layouts.

Available Subpanels

Related records between modules in Sugar are commonly displayed in Subpanels. Similar to list type layouts, administrators can modify the available subpanel layouts to change which fields are shown in a module's subpanel. You can add or remove fields for these subpanels depending on the information that you want to

display to users. To access the subpanels section in Module Builder, expand "Available Subpanels" from the Packages Panel under the desired module.

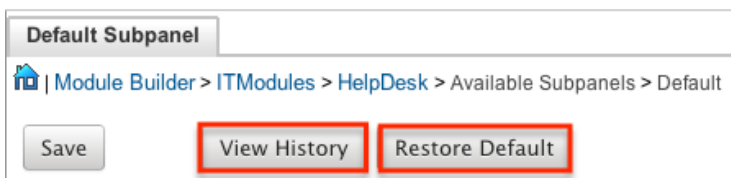


The available subpanels for the selected module will appear.

Subpanel Options

Subpanels in Sugar have more options than just positioning of fields. The following are some of the options Sugar administrators have when configuring subpanels throughout Module Builder:

- **Layout History** : Sugar keeps a history of the changes made to each subpanel. These changes and when they occurred can be viewed and restored via "View History". For more information on viewing the history of subpanels, please refer to the [Viewing Layout History](#) section of this documentation.
- **Restore Defaults** : Sugar also contains the ability to restore a subpanel to its original default configuration. For more information on how to reset a subpanel to default, please refer to the [Restoring Layout Defaults](#) section in this documentation.

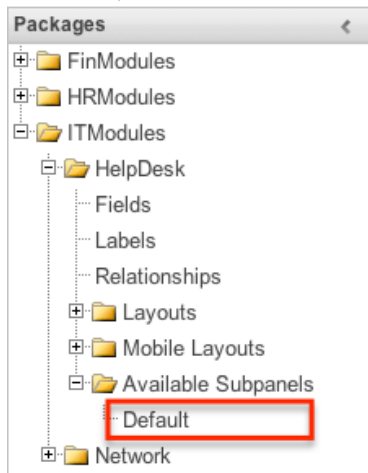


Modifying Subpanels

Use the following steps to modify a subpanel via Module Builder:

1. Expand "Available Subpanels" from the Packages Panel under the desired

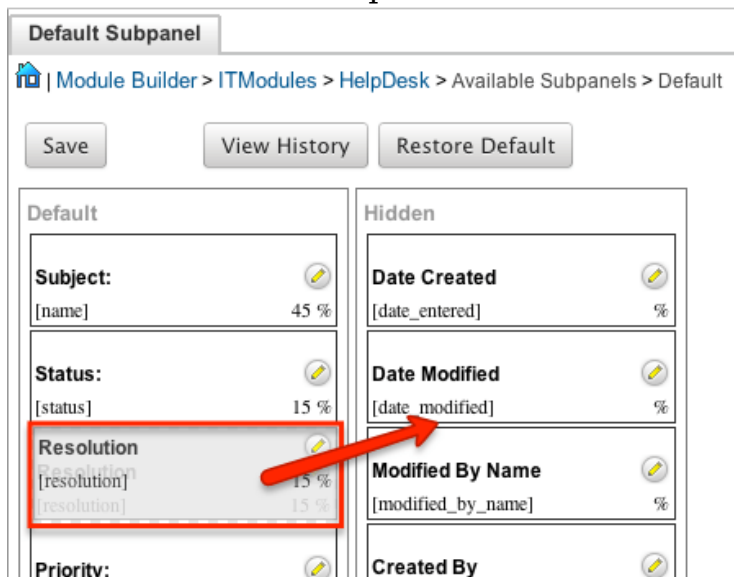
module, and select the subpanel you wish to edit.



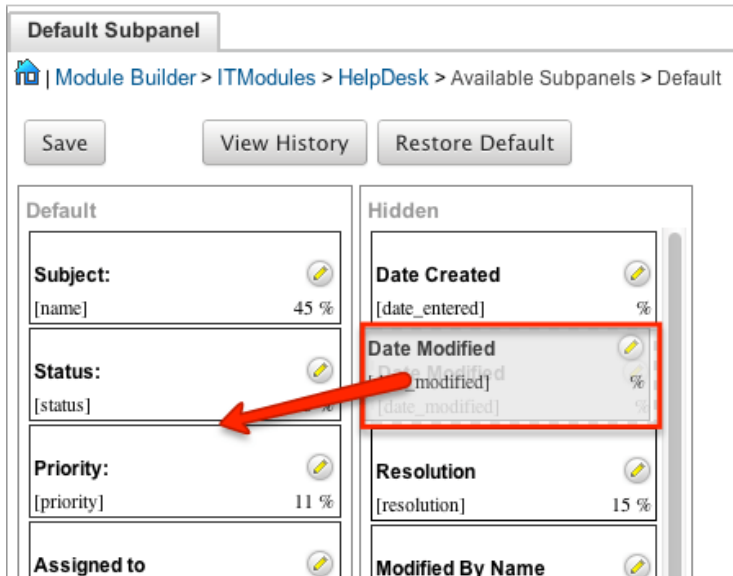
The selected subpanel will display in the Main Panel.

2. Optionally set and configure the [Subpanel Options](#) or perform the following actions to edit the subpanel:

Remove a Field : Drag a field from the Default panel to the Hidden panel to remove it from the subpanel.

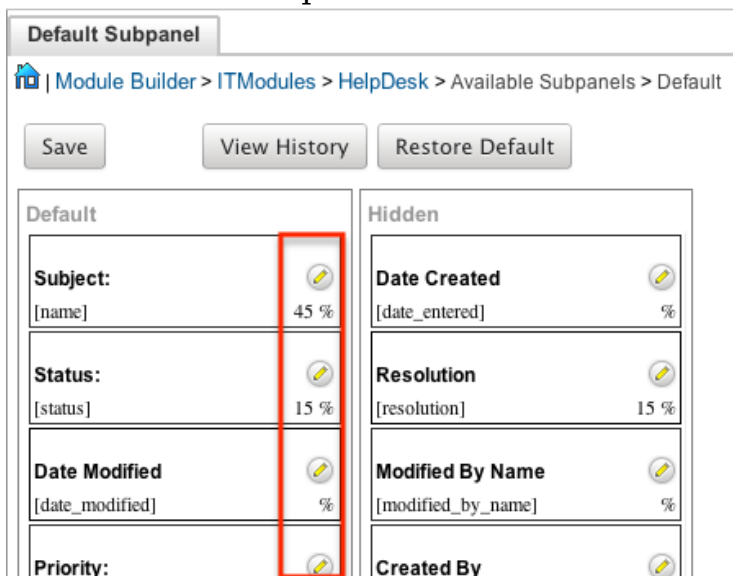


Add a Field : Drag a field from the Hidden panel to the Default panel to add it to the subpanel.



Change Field Order : Drag a field up and down in the Default list to move its position left and right in the subpanel.

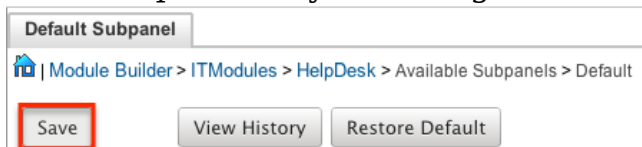
Edit a Field's Width : Click the Pencil icon to change the percentage width of the field in the subpanel.



Enter in the width percentage and click "Save" to continue.



3. Once the necessary information for the subpanel has been configured, click "Save" to preserve your changes.

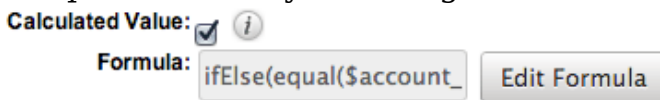


Using Sugar Logic

Sugar Logic allows Sugar administrators to write simple formulas and logic checks to provide a calculation for a field or to set the visibility of a field. A formula specifies one or more field values along with operators and functions that are mathematical or logical. When you execute a formula, Sugar performs the calculation to derive the value. When a field is used in a formula, Sugar recalculates the value whenever a user updates it and saves the record. Similarly, if you update a formula, Sugar recalculates the field value based on the updated formula.

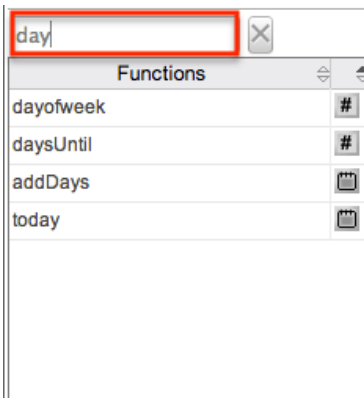
For more information regarding the types of fields you can use Sugar Logic in, please refer to the [Field Options](#) section in this documentation.

Administrators can access the formula builder for the fields and options that accept formulas by selecting "Edit Formula".

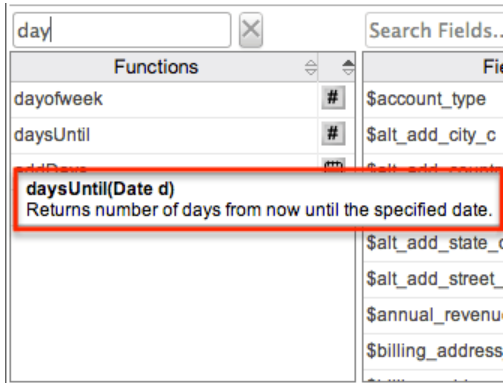


Functions

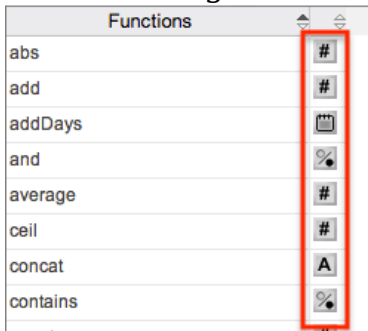
Functions are listed on the bottom left hand corner of the formula builder and provide a variety of calculations, logic checks, and formatting options. To locate the function you need, you can scroll through the list or enter search criteria to narrow the list.



To see how to use a function and what the function does, simply hover over the function to view the syntax, parameters, and a brief description of what the function does.



The function name is followed by a comma-separated list of parameters to the function. The list specifies the data type expected for each parameter. For example, the function `daysUntil` expects one parameter of Date type. The brief description in the hover text will typically specify what data type is being returned, but if it does not, you can determine the data type being returned via the icon to the right of the function in the grid.



The following is a list of the possible return type symbols and what they stand for:

Symbol	Description
#	Returns a Number
Calendar	Returns a Date object with a date and time
%	Returns a Boolean (true or false) value
A	Returns Text
[]	Returns a List
?	Returns a variable data type that could be any of the above

Functions are defined to either accept a set number of parameters or have an undetermined amount of parameters. Many function parameters require a specific data type to be passed in for the function to work. Functions can be nested matching up the return data type of the function to the parameter data type of a different function. The following functions and their parameters (multiple parameters are indicated with "...") are available in Sugar:

Function	Description	Parameters	Return Type
----------	-------------	------------	-------------

abs	Returns the absolute value of \$param1.	Number \$param1	Number
add	Returns the sum of the given parameters.	Number \$param1, ...	Number
addDays	Returns \$date moved forward or backwards by \$days.	Date \$date, Number \$days	Date
and	Returns true if and only if all given parameters are true.	Boolean \$param1, ...	Boolean
average	Returns the average of the given parameters.	Number \$param1, ...	Number
ceil	Returns \$param1 rounded up to the next integer.	Number \$param1	Number
concat	Returns all of the given parameters appended together in the order passed.	String \$param1, ...	Text
contains	Returns true if \$needle is within \$haystack.	String \$haystack, String \$needle	Boolean
count	Returns the number of records related to this record by \$module	Relate \$module	Number
createList	Returns a List of the given parameters.	Generic \$param1, ...	List
date	Returns \$param1 as a Date object.	String \$param1	Date
dayofweek	Returns the number of the day of week that \$param1 falls on.	Date \$param1	Number
daysUntil	Returns number of	Date \$param1	Number

	days from now until \$param1.		
divide	Returns the \$numerator divided by the \$denominator.	Number \$numerator, Number \$denominator	Number
equal	Returns true if \$param1 is equal to \$param2.	Generic \$param1, Generic \$param2	Boolean
floor	Returns \$param1 rounded down to the next integer.	Number \$param1	Number
getDropdownKeySet	Returns a List of the keys in the dropdown named \$param1. This list must be defined in the Dropdown editor.	String \$param1	List
getDropdownValue	Returns the value for the \$key found in the dropdown named \$list. This list must be defined in the Dropdown editor.	String \$list, String \$key	Text
getDropdownValueSet	Returns a List of the values in the dropdown named \$param1. This list must be defined in the Dropdown editor.	String \$param1	List
greaterThan	Returns true if \$param1 is greater than \$param2.	Number \$param1, Number \$param2	Boolean
ifElse	Returns \$return1 if \$condition is true or \$return2 if \$condition is false.	Boolean \$condition, Generic \$return1, Generic \$return2	Variable
indexOf	Returns the position of \$needle	Generic \$needle, List \$haystack	Number

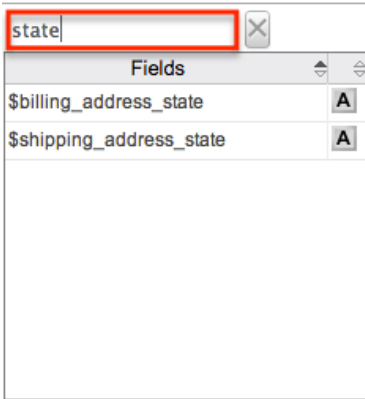
	in \$haystack or -1 if \$haystack does not contain \$needle. The index starts at 0.		
isAfter	Returns true if \$param1 is after \$param2.	Date \$param1, Date \$param2	Boolean
isBefore	Returns true if \$param1 is before \$param2.	Date \$param1, Date \$param2	Boolean
isInList	Returns true if \$needle is contained within \$haystack.	Generic \$needle, List \$haystack	Boolean
isValidDate	Returns true if \$param1 is a valid date string.	String \$param1	Boolean
isValidEmail	Returns true if \$param1 is in a valid email address format.	String \$param1	Boolean
isWithinRange	Returns true if \$value is greater than or equal to \$min and less than or equal to \$max.	Number \$value, Number \$min, Number \$max	Boolean
ln	Returns the natural log of \$param1.	Number \$param1	Number
log	Returns the \$base Log of \$value.	Number \$value, Number \$base	Number
max	Returns highest value of the given parameters.	Number \$param1, ...	Number
median	Returns the median of the given parameters.	Number \$param1, ...	Number
min	Returns lowest value of the given parameters.	Number \$param1, ...	Number
monthofyear	Returns the number	Date \$param1	Number

	of the month that \$param1 is in.		
multiply	Returns the value of the given parameters multiplied together.	Number \$param1, ...	Number
negate	Returns the negated value of \$param1.	Number \$param1	Number
not	Returns true if \$param1 is false, and false if \$param1 is true.	Boolean \$param1	Boolean
now	Returns a Date object representing todays date and the current time.		Date
number	Returns the numeric value of \$param1.	String \$param1	Number
or	Returns true if any given parameters are true.	Boolean \$param1, ...	Boolean
pow	Returns the \$value raised to the power of \$exponent.	Number \$value, Number \$exponent	Number
related	Returns the value of \$field in the related \$module.	Relate \$module, String \$field	Variable
rollupAve	Returns the average value of \$field in records related to \$module.	Relate \$module, String \$field	Number
rollupMax	Returns the highest value of \$field in records related to \$module.	Relate \$module, String \$field	Number
rollupMin	Returns the lowest value of \$field in records related to \$module.	Relate \$module, String \$field	Number

rollupSum	Returns the sum of the values of \$field in records related to \$module.	Relate \$module, String \$field	Number
strlen	Returns the number of characters in \$param1.	String \$param1	Number
strToLower	Returns \$param1 converted to lower case.	String \$param1	Text
strToUpper	Returns \$param1 converted to upper case.	String \$param1	Text
subStr	Returns the portion of \$value specified by \$start and \$length. The position starts at 0.	String \$value, Number \$start, Number \$length	Text
subtract	Returns \$param1 minus \$param2.	Number \$param1, Number \$param2	Number
today	Returns a Date object representing todays date.		Date
toString	Returns \$param1 converted to a string.	Generic \$param1	Text
translateLabel	Returns the translated value of \$label for \$module.	String \$label, String \$module	Text
valueAt	Returns the value at position \$index in \$haystack.	Number \$index, List \$haystack	Variable

Fields

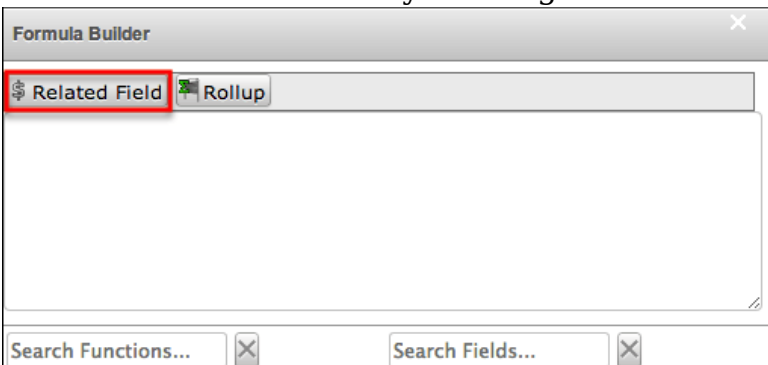
Fields are listed on the bottom right hand corner of the formula builder and contain the fields for the current module. Fields can be referenced in formulas and will start with a \$. To locate the field you need, you can scroll through the list or enter search criteria to narrow the list.



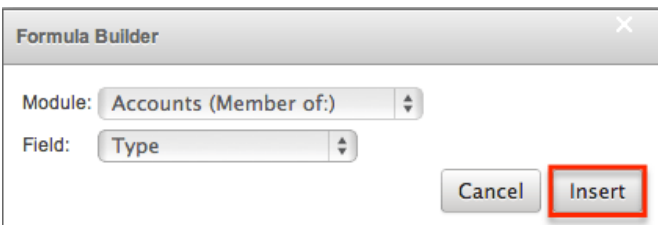
To add a field to the formula, simply click on the field to be added. The variable name for the field will be placed at the end of the formula. You can also type the variable names manually in the formula.

Related Field

Related fields are available to be added to formulas via the related function. You can manually add related function calls to your formula or you can build the syntax for the related function by clicking "Related Field".



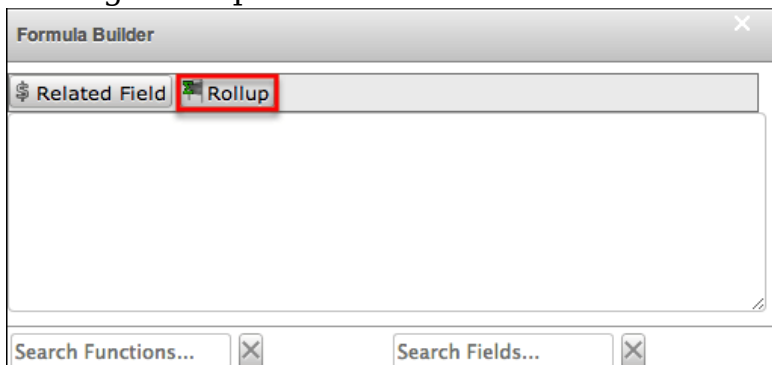
This will open a dialog box which will assist in building the syntax to use the related function. Select a module and a field within that module to pull the related field from and click "Insert".



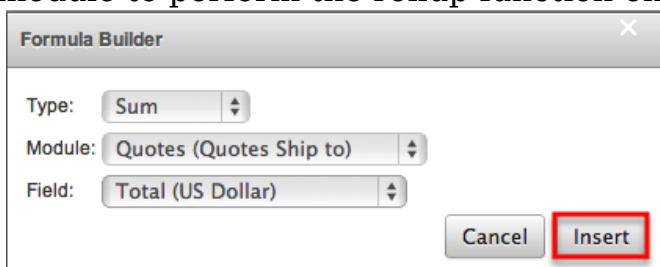
The resulting syntax for the selected options will be added to the formula.
Note : If a record has multiple related records to a module, the related function will pull the field from one of the related records. It is not recommended to rely on the related function to pull the same related records for a many relationship.

Rollup

In addition to adding related fields, you can also add aggregate functions on related fields to formulas via the rollup functions. You can manually add rollup function calls to your formula or you can build the syntax for the rollup function by clicking "Rollup".



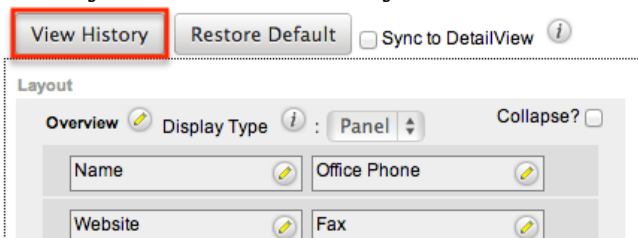
This will open a dialog box which will assist in building the syntax to use the rollup function. Select the type of rollup function to perform (Sum, Average, Minimum, or Maximum). To perform a count of related records, please refer to the count function listed in the [Functions](#) section. Select a module and a field within that module to perform the rollup function on and click "Insert".



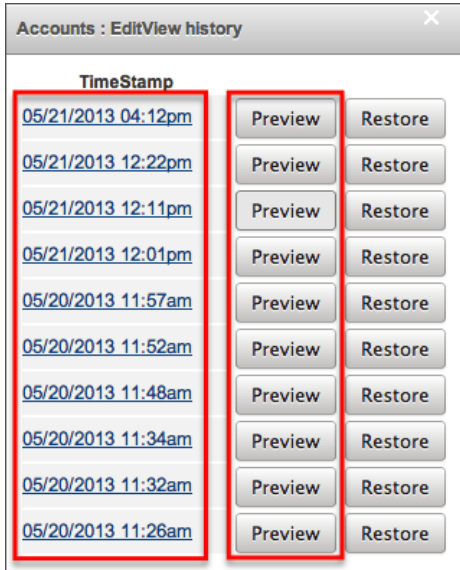
The resulting syntax for the selected options will be added to the formula. Note : Rollup functions can only aggregate number type fields.

Viewing Layout History

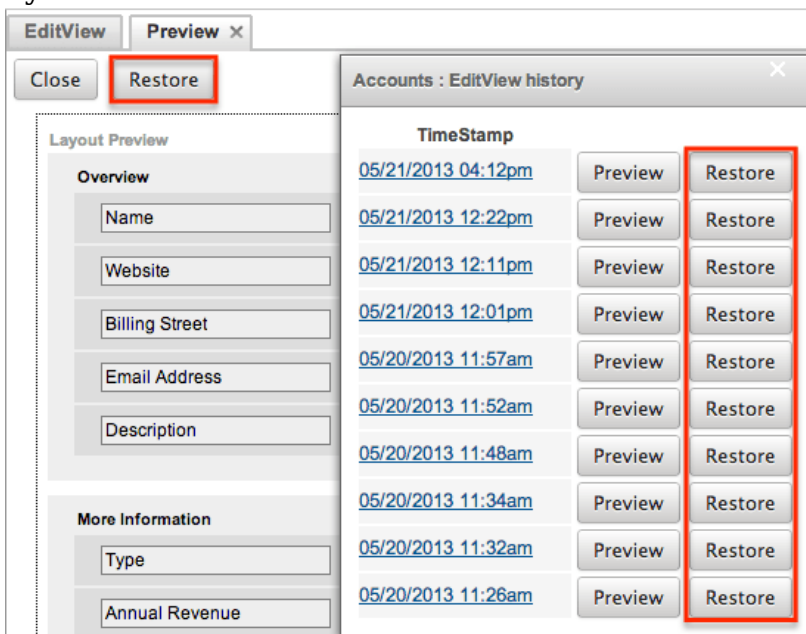
Layouts, subpanels, and mobile layouts keep a history of the last ten changes made to the layout. To view the history for any of these layouts, simply select "View History" from the edit layout screen in Module Builder.



The history dialog box will open up showing the timestamps of the last ten saves to the selected layout. Select the timestamp or "Preview" for the layout revision to open it in a new tab the main panel.



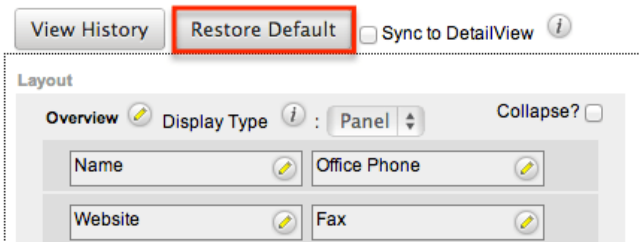
From the Preview tab, you can see the details of the panels and fields on the layout. From the history dialog or from the Preview tab, click "Restore" to set the layout to the version selected.



The layout will load into the editor to allow you to make changes. Click "Save" to preserve your changes.

Restoring Layout Defaults

Many layouts, subpanels, and mobile layouts can be restored to their original default configuration. To restore the default for any of these layouts, simply select "Restore Default" from the edit layout screen in Module Builder.



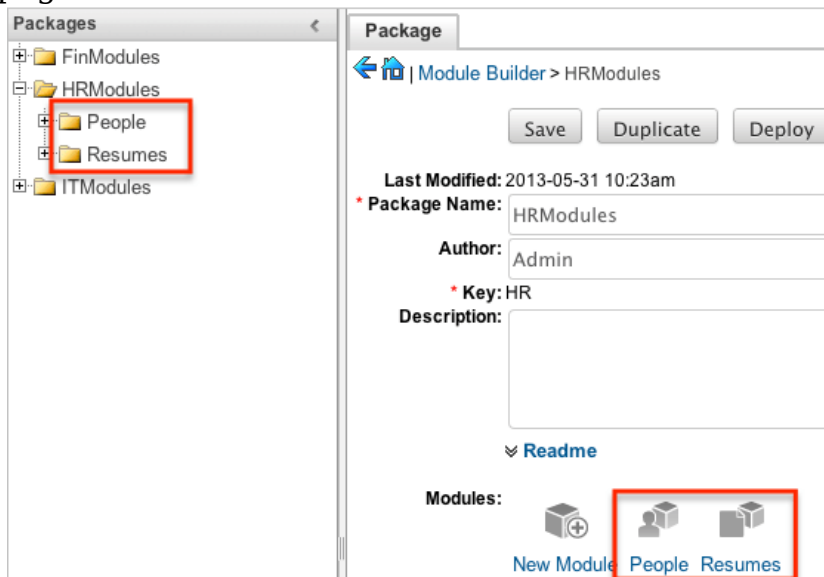
The default layout will load into the editor to allow you to make changes. Click "Save" to preserve your changes.

Deleting Modules

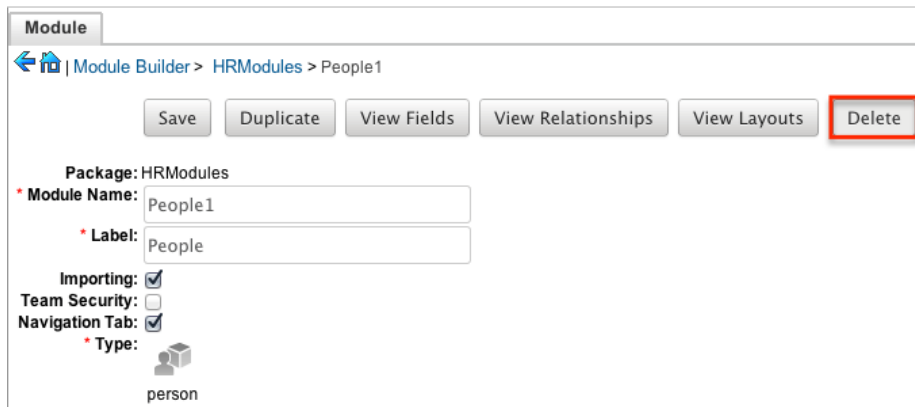
If a module is invalid or should no longer appear in a package, it may be deleted from Module Builder. Deleting a module from a package will not remove the module from any instances the package was deployed to. For more information on how to uninstall a deployed package from an instance, please refer to the Module Loader documentation in the Administration guide.

Use the following steps to delete a module from a package via Module Builder:

1. Select the desired package and module from the Packages Panel, or the home page of Module Builder in the Main Panel.



2. Click "Delete".



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

Last Modified: 04/20/2017 01:27pm

Module Loader

Overview

Module Loader is used to install a variety of custom file packages, including custom modules, into a Sugar instance. Using Module Loader, you can also manage and uninstall these packages, all done through Sugar's user interface. Packages are uploaded as a ZIP file from an administrator's local computer and then, when deployed, will force changes upon the instance's filesystem and database.

Custom module packages can be created and modified in [Module Builder](#) , and then, after deployment, they will show in Module Loader. They can also be exported from Module Builder in one instance, and then uploaded to another instance via Module Loader.

Note: Upgrade files and flavor conversion files are uploaded via the [Upgrade Wizard](#) , not Module Loader

Module Loader Layout

Module Loader consists of three panels. The panels include all necessary information about the packages, and also include different action buttons, explained in [Module Loader Fields](#) . The panels are:

- Installed Packages : This panel shows all installed packages. On this panel,

you have the option to uninstall or disable installed packages. After installation, the packages will move from the Uploaded Packages panel to this panel.

Module Loader

The following extensions are installed on this system:

Name	Action	Enable/Disable	Type
Dashboard Manager	<input type="button" value="Uninstall"/>	<input type="button" value="Disable"/>	module

- **Module Upload** : This panel consists of an upload option where files can be uploaded to Sugar via a browser file selection window. Please review [Uploading Modules](#) for more information on using this panel.

The screenshot shows a form with the label 'Module'. It contains a file selection input field with the text 'No file chosen' and a 'Choose File' button. To the right of the input field is an 'Upload' button.

- **Uploaded Packages** : This panel shows all packages that have been uploaded to Sugar, but have not yet been installed, or have been uninstalled. Packages can be installed or deleted from Sugar using this panel.

Name	Install	Delete	Type
SchedulerAlerts	<input type="button" value="Install"/>	<input type="button" value="Delete Package"/>	Module

Module Loader Fields

Module Loader contains different fields on the [Installed Packages and Uploaded Packages panels](#) . Each set of fields show relevant and identifying information about the module package.

The Installed Packages panel consists of the following fields:

Field	Description
Name	The name of the package, pulled from the manifest.php file of the package
Action	Button allowing you to uninstall the package from your Sugar instance if the package is marked as uninstalleable in the manifest.php file of the package
Enable/Disable	Button allowing you to enable or disable the functionality of the package, without uninstalling
Type	Describes the type of package, pulled from the manifest.php file of the package

Version	The version of the package, pulled from manifest.php file of the package
Date Installed	The date and time that the package was installed
Description	The description of the package, pulled from the manifest.php file of the package

The Uploaded Packages panel consists of the following fields:

Field	Description
Name	The name of the package, pulled from the manifest.php file of the package
Install	Button allowing you to install the package to your Sugar instance
Delete	Button allowing you to delete the package from your Sugar instance
Type	Describes the type of package, pulled from the manifest.php file of the package
Version	The version of the package, pulled from manifest.php file of the package
Date Published	The date and time that the package was initially created from the publisher
Uninstallable	Tells you if the package is uninstallable from the manifest.php file of the package
Description	The description of the package, pulled from the manifest.php file of the package

Uploading Packages

After receiving the file that you would like to install, you must first upload it to your Sugar instance. To upload a file, follow the following steps:

1. Navigate to Admin > Module Loader
2. Click the "Choose File" button in the Module Upload panel to open a file selection window from your browser

Module No file chosen

3. Select the file from your local computer
4. After you select your file, click the "Upload" button to complete the process

Module DashboardManager_v1.7.zip

5. After it has been uploaded, the package will show in the Uploaded Packages panel

Module No file chosen

Name	Install	Delete	Type
Dashboard Manager	<input type="button" value="Install"/>	<input type="button" value="Delete Package"/>	Module

Installing Packages

After uploading a package to Module Loader, it must be installed for the package's contents to take effect on your instance. To install a package, follow the following steps:

1. Follow the steps to [upload your package](#) to Module Loader.
2. Click the "Install" button on the Uploaded Packages panel.

Name	Install	Delete	Type
Dashboard Manager	<input type="button" value="Install"/>	<input type="button" value="Delete Package"/>	Module

3. You will be brought to the installation screen to confirm that the packages should be installed, and to read and accept any license or readme documentation as needed. Click "Commit" when ready to run the installation.

Ready To Install

Please read the following License Agreement:

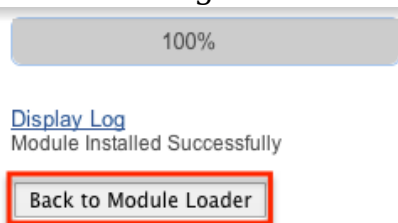
PLEASE READ THIS MASTER SUBSCRIPTION AGREEMENT CAREFULLY BEFORE ACCEPTING. THE TERMS AND CONDITIONS OF THIS MASTER SUBSCRIPTION AGREEMENT, ANY ADDITIONAL TERMS AND ANY ORDER FORMS ENTERED INTO BY YOU AND SUGARCRM ARE COLLECTIVELY REFERRED TO AS THE "AGREEMENT." UNLESS OTHERWISE DEFINED HEREIN, CAPITALIZED TERMS SHALL HAVE THE MEANINGS SET FORTH IN SECTION 11 BELOW.

Accept Deny

4. The next page will show a progress bar and a completion notice. If there are

any errors, they will be displayed with a verbose explanation of what went wrong. If not, click "Display Log" to show what happened during the installation process.

5. Click "Back to Module Loader" when complete to return to Module Loader. If you do not need to install any further packages, you can navigate to any other section of Sugar as need be.



Note: If you would like to restrict users from installing packages via Module Loader, you can add configuration options to your instance's `config_override.php` file. For more information on these types of changes, please review the [Advanced Configuration Options](#) section of the Administration guide.

Uninstalling Packages

After a package has been [installed](#) into your Sugar instance, it can be removed if it is no longer needed. When uninstalled, the package will remove any available customizations to your instance from the filesystem and database.

Note: Packages have to be defined as "Uninstallable" in the `manifest.php` file of the package to be able to be uninstalled.

To uninstall a package, perform the following steps:

1. Navigate to Admin > Module Loader.
2. Locate the package you would like to uninstall in the Installed Packages panel.
3. Click the "Uninstall" button.

Note: If you do not see an Uninstall button next to your package, that means that it is either defined to be permanently installed or files for that package that are critical to performing the uninstall are missing from the file system.

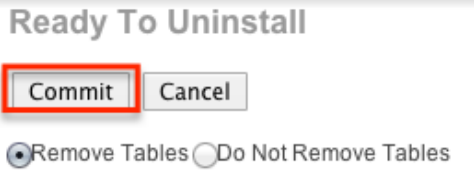
The following extensions are installed on this system:

Name	Action	Enable/Disable	Type
Dashboard Manager	Uninstall	Disable	module

4. If the package has added any database tables to your instance, you will see a selection whether to remove or retain the database tables. If the database tables include any information you would like to keep, select the "Do Not Remove Tables" option. An example of this would be if you are uninstalling a custom module, but will be reinstalling a new version of the same module. You would want to keep the data, but remove any files associated with the old

module that will be replaced with the new package.

5. Click "Commit" when you are ready to uninstall the package.



6. The next page will show a progress bar and a completion notice. If there are any errors, they will be displayed with a verbose explanation of what went wrong. If not, click "Display Log" to show what happened during the uninstall process.
7. Click "Back to Module Loader" when complete to return to Module Loader. If you do not need to uninstall any further packages, you can navigate to any other section of Sugar as need be.



8. After the package has been uninstalled, it can be deleted from your instance via the Uploaded Packages panel.

Name	Install	Delete	Type
Dashboard Manager	<input type="button" value="Install"/>	<input checked="" type="button" value="Delete Package"/>	Module

Last Modified: 09/26/2015 06:25pm

Workflow Management

Overview

Sugar's Workflow functionality allows administrators to configure cause and effect type actions throughout Sugar and across multiple modules. Workflows can be used to update fields, send emails, or create records once certain sets of conditions are reached. Workflows are a great way to configure automated processes within Sugar so that users do not need to remember manual steps and instead can focus on their primary tasks and job responsibilities.

All workflow conditions are reached and checked for once a record is saved. Workflows can be configured to either start their process to perform the job the moment the save occurs, or they can be delayed for a given amount of time.

The following save events can trigger a workflow to fire:

- Manual save of a record
- Mass updating records
- [Importing](#) records
- Another workflow updating a record
- Reassigning Records via [User Management](#)
- Updating or creating of a record via [plug-ins](#)
- Updating or creating of a record via [Sugar mobile applications](#)
- Updating or creating of a record via the [Web Services](#)

Workflows can be viewed and configured by any System Administrator User. In addition, regular users with a role that provides Developer access will be able to access workflows for the module they have the rights to. For more information on Roles, please review the [Roles](#) documentation.

Workflow Fields

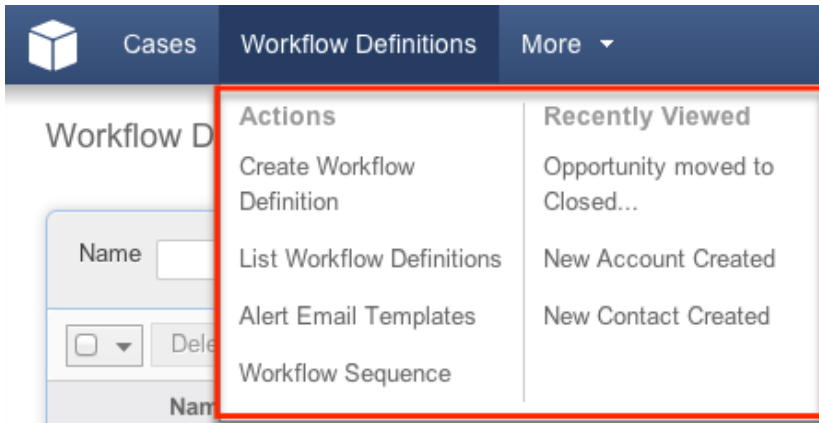
The Workflow module contains seven fields that will retain both functional and organizational purposes in Workflows. These fields cannot be edited or added to because of their functional purposes in the workflow process.

Field	Dropdown Options	Description
Applies To	New and Updated Records New Records Only Updated Records Only	Choose if this workflow is going to fire on all saves, when a new record is created, or when an existing record is updated
Description	(Text Area Field, no	A description of this

	character limit)	workflow and its purpose
Execution Occurs	When record saved After time elapses	Whether the workflow effects will occur once a record is saved, or if they will be re-checked and occur after a defined amount of time
Name	(Text field, limit of 50 characters)	Identifying name of the workflow
Processing Order	Alerts then Actions Actions then Alerts	If your workflow is going to include both email alerts and workflow actions, select which of the two you would like to happen first
Status	Active Inactive	When set to Inactive, the workflow will not process
Target Module	(Module List)	A list of all modules in Sugar that are compatible with workflows. Choose which module the primary conditions will be triggered from

Workflow Module Tab

The Workflow Definitions module tab is typically located on the navigation bar at the top your Sugar screen after navigating to Admin > Workflow Management. Click the tab at any time to access the Workflows list view. You may also hover on the tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The [Recently Viewed](#) menu displays the list of workflow definitions you last viewed in the module.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Workflow Definition	Opens the edit view layout to create a new workflow
List Workflow Definitions	Opens the list view layout to search and display workflows
Alert Email Templates	Opens the Alert Template menu to allow you to create, view, and edit existing alert email templates
Workflow Sequence	Opens the Workflow Sequence menu to allow you to reorganize the processing order of your workflows for each module

Creating Workflows

Workflows are created by accessing the Admin menu, navigating to the Developer Tools section and then clicking on the link for Workflow Management.

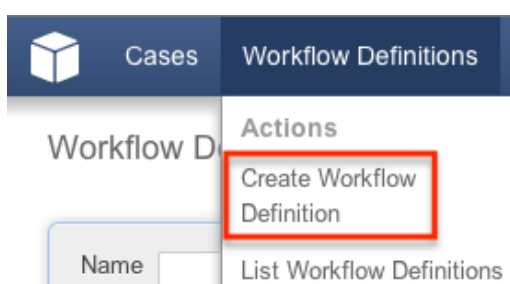
Once on the Workflow Management module, you can create a new workflow or duplicate an existing one. The process of creating workflows contains four main sections. First, the workflow itself must be created. This creation process will include the name of the workflow, as well as the rest of the values for the fields listed in the [Workflow Fields](#) section of this documentation. After the workflow has been saved, the next step will be to configure the [Workflow Conditions](#), which defines what will cause the workflow to happen, or its triggers. Finally, the [Workflow Alerts](#) and [Workflow Actions](#) must be configured. These define what the workflow will do to Sugar records or what emails will be sent out after triggered.

Creating Via Workflow Module

The most common method of workflow creation is via the Create Workflow Definition option in the Workflow Management module. This opens up the edit view layout which allows you to enter in all the relevant information for the workflow.

Use the following steps to create a workflow via the Workflow Management module:

1. Navigate to Admin > Workflow Management.
2. Hover on the Workflow Definitions tab and select "Create Workflow Definition".



3. Enter appropriate values for the [fields](#) in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
4. Once the necessary information is entered, click "Save".

Edit

Name: *

Execution Occurs: * ↓

5. Define the conditions of the workflow that will trigger the workflow to process as described in [Creating Workflow Conditions](#).
6. Define what will happen when the workflow is processed as described in [Creating Workflow Alerts](#) and [Creating Workflow Actions](#).

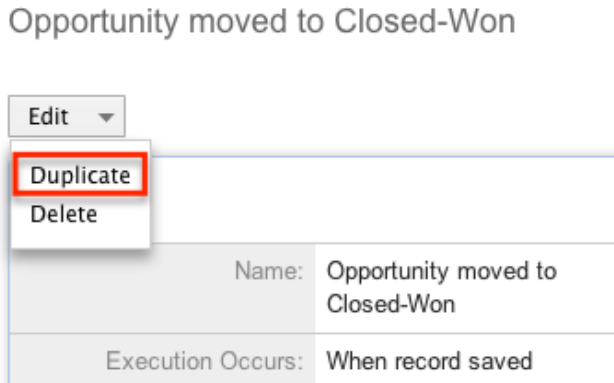
Creating Via Duplication

You can also create a new workflow definition by duplicating an existing workflow record. The duplicate option is useful if the workflow you are creating has similar information, conditions, and alerts and actions to an existing workflow as all of

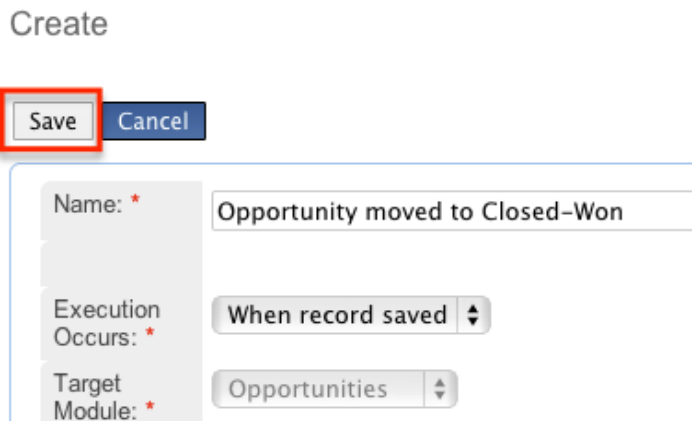
these are copied over during duplication process.

Use the following steps to create a workflow definition by duplicating an existing record:

1. Navigate to a workflow definition's detail view.
2. Click the Actions menu and select "Duplicate".



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



Creating Workflow Conditions

Workflow conditions are an essential function when creating workflows. Workflow Conditions define the "cause" side of workflow's cause and effect type functionality. At least one condition must exist for a workflow to trigger. If more than one conditions exist, they all must be fulfilled for the workflow to trigger.

Use the following steps to create a workflow condition:

-
1. Navigate to the detail view of the workflow.
 2. Click "Create" on the Conditions subpanel to open a popup box with the different condition possibilities.



3. Follow the prompts in the popup to create the different conditions, as described below. Once complete, click "Save" and the condition will be added to your workflow definition.
4. Repeat this process as necessary to add additional conditions.
5. After the condition has been created, it will appear in the [conditions subpanel](#).

Note: The available conditions will vary depending on the execution type you have chosen for the workflow, either "When record saved" or "After time elapses".

Creating "After Time Elapsed" Workflow Conditions

The "After time elapsed" workflow condition options are different for the first condition and subsequent conditions. This is to ensure that your time based condition is recorded. After that, you can set additional conditions to filter the records from which the workflows will fire.

The initial "After time elapsed" workflow condition options are as follows:

- When a field in the target module changes to or from a specified value : You will be asked to specify a specific field within the module, and its value. Then, you will select the amount of time after the change that, after this threshold, the workflow will fire.
- Field does not change for a specified amount of time : You will be asked to specify a specific field within the module and a timeframe. After the field changes, if it does not change again in the given timeframe, the workflow will fire.

Please note that the time intervals (e.g. 0 hours, 4 hours, 8 hours, etc.) you specify when setting up the conditions can be configured via Admin > Dropdown Editor. For more information on configuring the time intervals, please refer to the [Developer Tools](#) documentation.

The secondary conditions for an "After time elapsed" workflow contain the two mentioned above, but also two others, as follows:

- When a field in the target module contains a specified value : This condition is used to filter records that should or should not be included in the workflow. You will be asked to specify a field and the value of the field, and if you want to include records where the field is a specific value, or if it is not a specific value. These conditions will vary by which field is chosen.
- When the target module changes and a field in a related module contains a specified value : This condition is used to filter records based on their related records. You will be asked to specify which relationship you would like to the workflow to look at, and which field and value should or should not be used when triggering the workflow.

Creating "When Record Saves" Workflow Conditions

The "When record saves" workflow condition options are as follows:

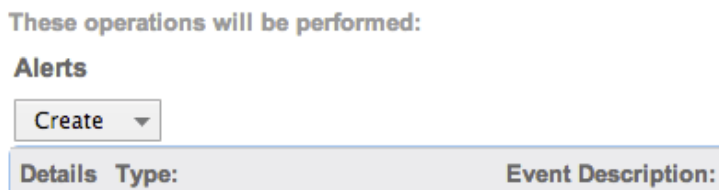
- When a field in the target module changes to or from a specified value : This option can be used to specify both the new value of a specific field to trigger a workflow, and also what the previous value was. You will be asked to specify the specific field and the new value after save to use this condition. The previous value is not required.
- When the target module changes : This option will cause the workflow to trigger when any change to the record takes place.
- When a field on the target module changes : This option will cause the workflow to trigger when there is any change to a specific field, regardless of what the change is.
- When a field in the target module contains a specified value : This condition is used to filter records that should or should not be included in the workflow. You will be asked to specify a field and the value of the field, and if you want to include records where the field is a specific value, or if it is not a specific value. These conditions will vary by which field is chosen.
- When the target module changes and a field in a related module contains a specified value : This condition is used to filter records based on their related records. You will be asked to specify which relationship you would like to the workflow to look at, and which field and value should or should not be used when triggering the workflow.

Creating Workflow Alerts

Workflow alerts are one of the possible effects of workflow's cause and effect type

functionality. These can be used with or without [workflow actions](#). Workflow alerts, when triggered by the workflow condition, will cause an email to be sent to a specified recipient. These recipients include Sugar users or individuals related to the target module. To create a workflow alert, follow the following steps:

1. Navigate to the detail view of the workflow.
2. Click "Create" on the Alerts subpanel, which will bring you to the alert setup page.



3. You will be presented with the following fields to populate.

Field	Description
Name	Choose a brief, descriptive name for this alert
Alert Type	Defaults to Email, which is the most common usage, but you can choose Invite if the alert is going to send an invite for appointment based modules
Source Type	Normal message will produce a plain text message (written in the Alert Text field), or Custom Template will use a Workflow Alert Template
Alert Text	Enter in text that will be sent to the alert recipients for a simple message without formatting or variables Note: This field will show depending on the selection made in Source Type
Custom Template	Select from your available Workflow Alert Templates in this dropdown for this alert's target module Note: This field will show depending on the selection made in Source Type

Enter necessary values for all fields and click Save.

On the next screen, click "Create" on the "Alert Recipient List" subpanel to choose your recipients.

New Customer Alert Email

Note: The only options that will send to someone other than a Sugar user are "Recipient associated with the target module" and "Recipient associated with a related module".

Pick the recipients, select any blue hyperlink text to define any variables, such as who a specified user is, or if the recipient should be sent the email as a "To", "CC", or "BCC" recipient, and then click "Save" to continue.

Repeat steps 5 and 6 as need be to add additional recipients for this workflow alert.

Click the hyperlink for "Send alert to the following recipient" to make any changes, remove any errant recipients with the "Remove" button on the corresponding row, or the "Edit" button on the top left if you need to change any configurations. Once complete, click "Return to Workflow Definition".

New Customer Alert

Edit	Delete	Return to Workflow Definition
Name:	New Customer Alert	Source Type: Custom Template
Alert Type:	Email	

Alert Recipient List

Create

Alert Recipients:	
Send alert to the following recipient:	A specified user Administrator remove

After the alert has been created, it will appear in the [Alerts Subpanel](#).

Creating Workflow Actions

Workflow actions are one of the possible effects of workflow's cause and effect type functionality. These can be used with or without [Workflow Alerts](#). Workflow actions, when triggered by the workflow condition, will cause either updates to existing records or creation of new records. To create a workflow action, follow the following steps:

1. Navigate to the detail view of the workflow that you are working on
2. Click "Create" on the Actions subpanel to open a popup box with the different action possibilities

Actions

Create

Details	Type:	Event Description:
---------	-------	--------------------

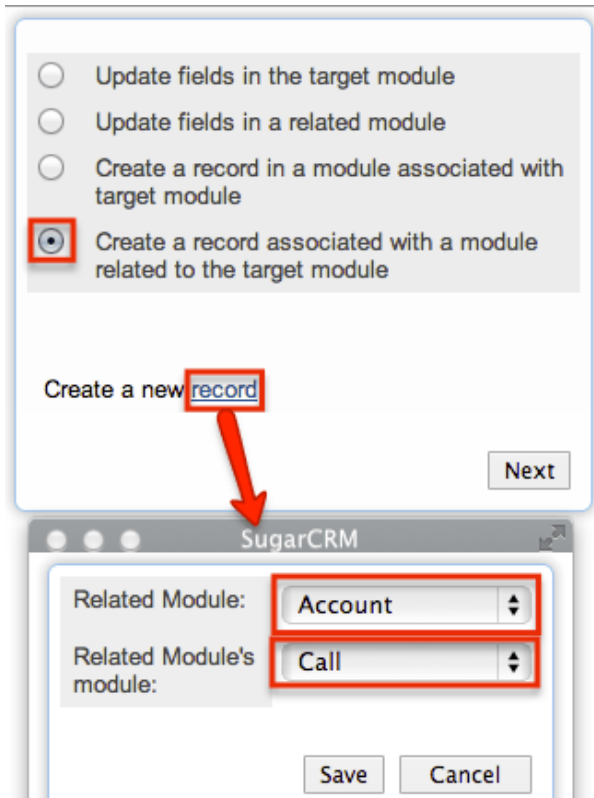
3. Follow the prompts in the popup to create the different actions, as described in [Workflow Actions](#). Once complete, click "Save" and the action will be added to your workflow definition.

-
4. Repeat this process as necessary to add additional actions.
 5. After that action has been created, it will appear in the [Actions Subpanel](#).

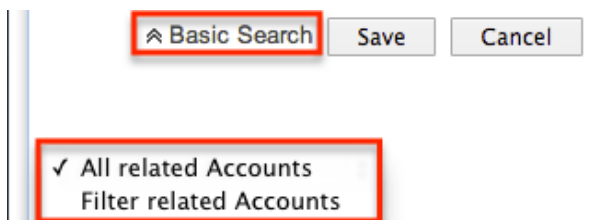
Workflow Action Types

There are four options for actions that are available. These options can make updates to the module your workflow is tied to, or a module related to this target module. The options can also create records in related modules or modules related to related modules. The options are as follows:

- Update fields in the target module : You will be given the option so select one or more fields within the target module of the workflow, and what the new value or values should be.
- Update fields in a related module : You will first be given the option to choose which related module to the target module you would like to update. After selecting the related module, you will select one or more fields within the related module to update, and what the new value or values should be.
- Create a record in a module associated with target module : You will be given the option to choose a related module to your target module. This action will create a new record in the related module, such as creating a new call related to an account, where Accounts is the target module. After selecting the module, you will be given the option to populate any or all fields with the related module. Any required fields will be marked with a red asterisk.
- Create a record associated with a module related to the target module : This action will take a record, or all records, related to your target module, and create a related record to this middle module. When creating these actions, you are asked to select the related module to your target module, and then select that module's related module where the new record is going to be created. For example, if your workflow's target module is Contacts, the following screenshot shows how a call will be created and related to the contact's related Account.



On the next screen, after selecting your modules, you will select one or more fields within the related module to update, and what the new value or values should be. Clicking on the "Advanced Search" button at the bottom of this window will allow you to select if the workflow is specific for all related records (Accounts), or if the related record should be filtered at all.



The "Advanced Search" function also contains special functions for specific field types:

- Assigned User : Allows you to configure the action to set the assigned user to be either the actual user or the user's manager who either is currently assigned to the triggered record, the one who most recently updated it, the one who created it, or is the one saving the record.
- Team ID : Allows you to configure the action to set the team to be the default team of the user who triggered the workflow or, if it is updating a related record, to mirror the team setting of the triggered record.

-
- **Dropdown Fields** : Allows you to configure the action to sequentially move the dropdown option forward or backward in the order in which it appears in the dropdown list.

Viewing Workflows

There are various options available for viewing workflow records in Sugar including via Workflow Definitions list view, Workflow Definitions detail view, and the Workflow Definitions' Last Viewed menu. Each method will provide varying degrees of detail and insight into the workflow.

Viewing Via List View

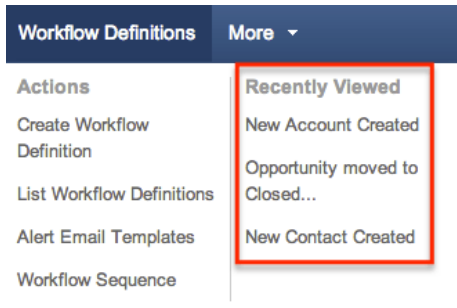
The Workflow Definitions list view displays all contact records meeting the current search criteria. To access the list view, simply click the Workflow Definitions module tab, which is made available by navigating to Admin > Workflow Management. While list view shows key workflow fields, you can click the workflow definition's name to open the record in detail view. For more information on viewing workflows via list view, please refer to the [Workflows List View](#) section of this documentation.

Viewing Via Detail View

The Workflow Definitions detail view displays thorough workflow information including all workflow fields followed by subpanels showing the Conditions, Alerts and Actions that process the workflow. The detail view can be reached by clicking a workflow definition's link from the Workflow Definitions list view. For more information on viewing workflows via detail view, please refer to the [Workflow Detail View](#) section of this documentation.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which workflows you have recently viewed. Hover on the [Workflow Definitions module tab](#) to see a list of your most recently viewed workflows and click each name to open the workflow definition in detail view.



Searching Workflows

The Workflow Definitions list view includes a Basic and Advanced Search to help you locate records easily and effectively. Once the search is performed, the relevant results will be displayed in the Workflows list view below. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %created). This will pull up any workflow that has the word "created" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the [Search](#) documentation.

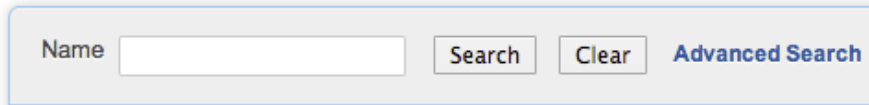
Basic Search

Basic search offers a simplified search experience allowing you to search for just the name of the workflow. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.

The buttons and checkboxes available in Basic Search panel have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear criteria from the Name field.

Workflow Definitions



A search panel with a text input field labeled "Name", a "Search" button, a "Clear" button, and a link for "Advanced Search".

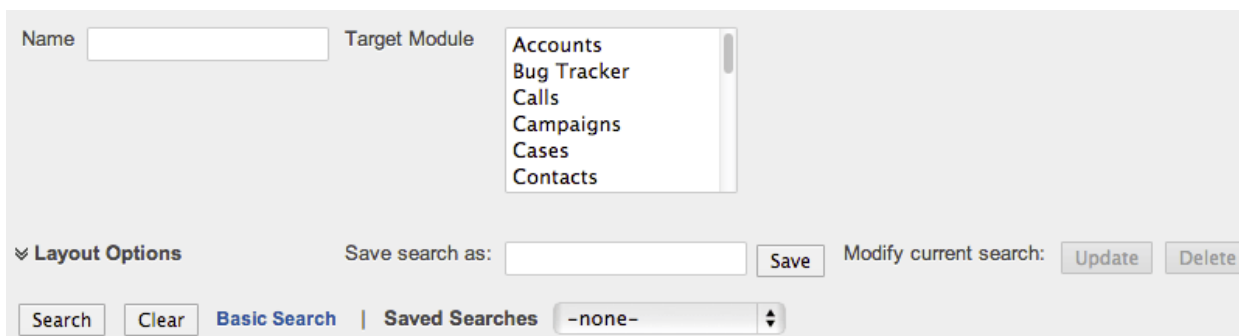
When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. Once the search is complete, the relevant results will populate in the [list view](#) below the search panel. To see all workflow definitions, simply click "Clear" and then "Search" to perform a blank search with no filters.

Advanced Search

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

The buttons and dropdowns available in Advanced Search have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the [Layout Options](#) section of the Search documentation.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the [Saved Search](#) section of the Search documentation.



An advanced search panel with a "Name" input field, a "Target Module" dropdown menu (showing Accounts, Bug Tracker, Calls, Campaigns, Cases, Contacts), a "Layout Options" section with a "Save search as:" input field and "Save", "Update", and "Delete" buttons, and a bottom row with "Search", "Clear", "Basic Search" (highlighted), "Saved Searches", and a "-none-" dropdown menu.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select the Target

Module as "Accounts" or "Contacts" and enter in the word "Created" for the Name search, Sugar will only return workflow definitions with a matching name from the Accounts or Contacts modules. Once the search completes, the relevant results will populate in the [list view](#) below the search panel. To see all workflow definitions, simply click "Clear" and then "Search" to perform a blank search with no filters.

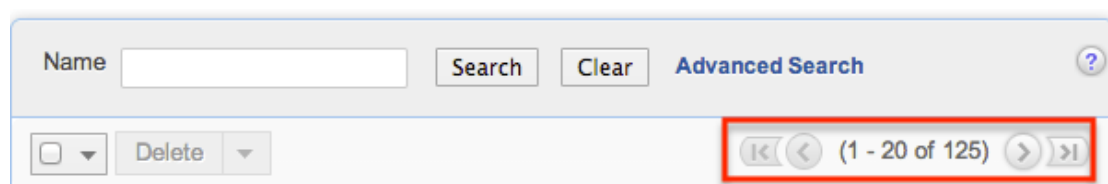
Workflows List View

The Workflows list view displays all workflow definitions meeting the current search criteria. You can view the basic details of each workflow within the field columns. The list view also allows for records to be edited or deleted as need be.

Pagination

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

By default, Sugar displays 20 records per list view page, but the number of records displayed can be changed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation.



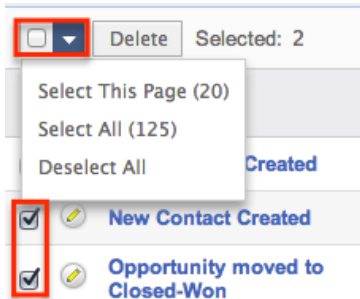
Checkbox Selection

You can delete workflow definitions directly from the list view by first selecting the desired records. To select individual workflows on the Workflow Definitions list view, mark the checkbox on the left of each row. To select or deselect multiple workflow definitions on the list view, use the options in the checkbox dropdown menu:

- Select This Page : Selects all records shown on the current page of workflow

results.

- **Select All** : Selects all records in the current search results across all pages of workflow results.
- **Deselect All** : Deselects all records that are currently selected.



Column Sorting

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

A screenshot of a table header with four columns: "Name", "Execution Occurs", "Status", and "Target Module". Each column header has a small double-headed arrow icon next to it, indicating that the columns are sortable. The table body below shows one row of data: "New Account Created", "When record saved", "Active", and "Accounts".

Name	Execution Occurs	Status	Target Module
New Account Created	When record saved	Active	Accounts

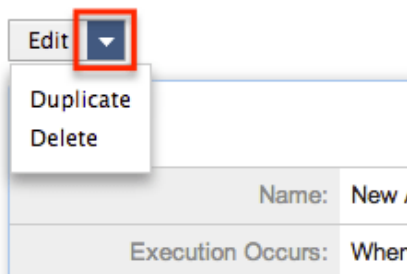
Workflow Detail View

The Workflow Definition detail view displays thorough workflow information including all workflow fields. You will also see the Conditions, Alerts, and Actionssubpanels beneath the workflow fields. The detail view can be reached by clicking a workflow record's link from the Workflow Definitions list view or from the recently viewed menu.

Actions Menu

The Actions menu on the top left of each workflow definition's detail view allows you to perform various actions on the current record. The action items can be configured to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the [System](#) documentation in the Administration guide.

New Account Created



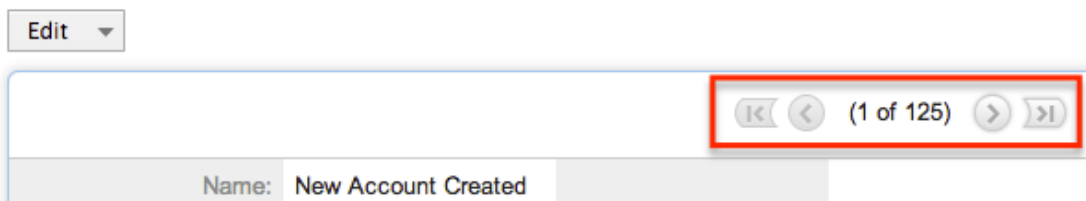
The Options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Edit	Edit this workflow definition
Duplicate	Duplicate this workflow definition
Delete	Delete this workflow definition

Next or Previous Record

On the upper right of the Workflow Definitions detail view, there are four buttons that allow you to page through each workflow in the Workflow Definition list view's current search results. Clicking the Previous button displays the previous workflow of the current search results while clicking the Next button displays the next workflow of the current search results. The two double-arrow First Page and Last Page buttons allow you to skip to the first or the last workflow of your current results. The text in between shows which workflow result you are currently viewing within the total number of current results.

New Account Created



Conditions Subpanel

The Workflow Conditions subpanel allows you to create additional conditions for your workflow and also lets you view and modify the existing ones. The subpanel shows a Description and a Value for each condition. The Description is an

automatically generated, brief explanation of the condition. The Value shows what field or fields are covered in the condition, if not expressly stated in the description. The Conditions subpanel allows the following operations to be performed.

- To view the details or edit a condition, either click the condition's description in the subpanel or click the edit button to from the far right of the record's row to open the condition popup.
- To create a new workflow condition, choose "Create" from above the subpanel, then follow the steps supplied in the [Creating Workflow Conditions](#)
- To delete a condition on this workflow, choose "Remove" from the far right of the record's row.



Alert Subpanels

The Workflow Alert subpanel allows you to create additional alerts for your workflow and also lets you view and modify the existing ones. The subpanel shows a Details, Type and an Event Description for each condition. After an alert has been created, there is also a column for Recipients. The Event Description is an automatically generated, brief explanation of the alert, containing the name of the Alert record and what template, if applicable, is being sent to the recipients. The Alerts subpanel allows the following operations to be performed.

- To view edit an alert, either click the alert's event description or click "Edit" on the far right of the row to open the alert's edit view.
- To view the recipients of the alert, click "Show" from the far left of the record's row. Click "Hide" to collapse the drawer highlighting the recipients
- To edit or add recipients of the workflow alert, click "Recipients". This button will also open the alert's detail view.
- To create a new workflow alert, choose "Create" from above the subpanel, then follow the steps supplied in the [Creating Workflow Alerts](#) section of this documentation.
- To delete an alert on this workflow, choose "Remove" from the far right of the record's row.

Alerts

Alerts

Create

Details	Type:	Event Description:		
Hide	Alerts	Recipients	Send <i>New Account Created</i> using a Custom Template: <i>New Account Template</i>	edit remove

• A specified user Administrator

Actions Subpanel

The Workflow Actions subpanel allows you to create additional actions for your workflow and also lets you view and modify the existing ones. The subpanel shows a Details, Type and an Event Description for each condition. The Event Description is an automatically generated, brief explanation of the action that will be performed by the workflow. The Conditions subpanel allows the following operations to be performed.

- To view the details or edit a condition, either click the condition's description in the subpanel or click the edit button to from the far right of the record's row to open the condition popup.
- To view the actions that will be performed, click "Show" from the far left of the record's row. Click "Hide" to collapse the drawer highlighting the actions.
- To create a new workflow action, choose "Create" from above the subpanel, then follow the steps supplied in the [Creating Workflow Actions](#) section of this documentation.
- To delete an action on this workflow, choose "Remove" from the far right of the record's row.

Actions

Actions

Create

Details	Type:	Event Description:		
Hide	Actions	Update fields in the target module	edit	remove

• Set account_type as Customer

Editing Workflows

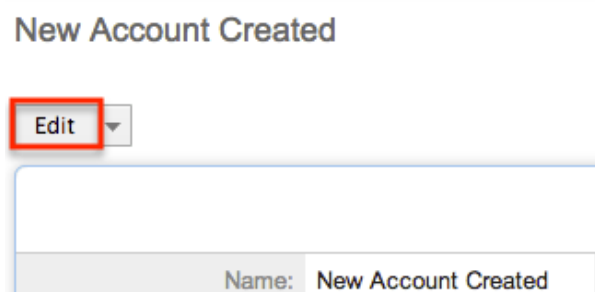
Workflows may be edited at any time to update or add information to the definition. You can make changes to existing workflow definitions via the Workflows edit view. Edit view is available within the Workflows module and

includes all of the Workflow fields. It can be accessed either via the detail view or list view. Please note that Conditions, Alerts, and Actions are not edited through the Workflow edit view.

Note: After a workflow has been created, the fields "Execution Occurs" and "Target Module" cannot be edited


Editing Via Detail View

You can edit workflows via the [detail view](#) by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve the changes made.



Editing Via List View

You can edit workflows via the [list view](#) by clicking the Pencil icon to the left of each workflow's name. The page will navigate to the edit view. Update the necessary fields, then click "Save" to preserve the changes. After saving, you will be brought to the detail view of the workflow.

Name	Execution Occurs	Status	Target Module
<input type="checkbox"/>  New Account Created	When record saved	Active	Accounts

Deleting Workflows

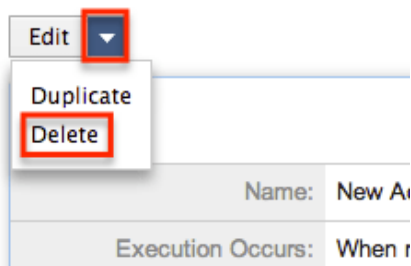
If a workflow definition is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Workflow Definitions detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting the workflow definition will also remove the conditions, actions, and alerts to stop workflows from firing.

Deleting Via Detail View

Use the following steps to delete a workflow via the detail view:

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

New Account Created

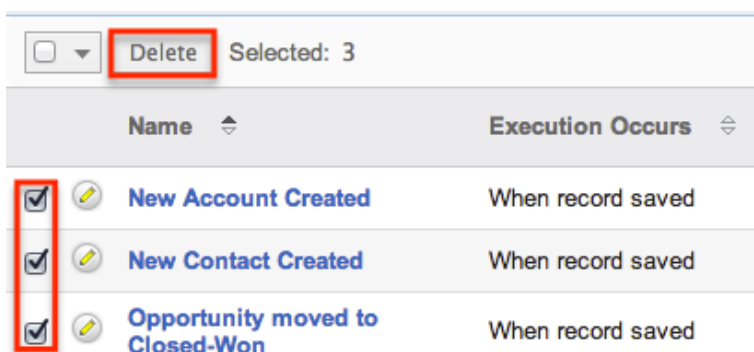


3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Mass Deleting Via List View

Use the following steps to delete one or more workflows via the list view:

1. Navigate to the Workflow Definitions list view via Admin > Workflow Management.
2. Use the [Basic](#) or [Advanced Search](#) to find the Workflow Definitions you wish to delete.
3. Select the desired records individually or using the [checkbox dropdown's](#) options.
4. Choose "Delete" from the Actions menu.



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

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

Workflow Alert Templates

When sending a workflow alert, you have the option of sending either a "Normal Message" which will be just a simple, plain text alert, or utilizing a workflow template. Templates have the option to use full HTML editing, to include formatting changes, colors, variables to include data from fields in Sugar, and more.

Alert Template Fields

The Workflow Templates functionality contains several fields that will retain both functional and organizational purposes in Workflows. These fields cannot be edited or added to because of their functional purposes in the workflow process.

Field	Description
Body	This is where you can design your email template using the WSIWYG (What you See Is What You Get) editor. Click the "Alt Text" checkbox to edit the plain text version of this email. The entry into this box is what will actually be sent to the recipients of the email.
Description	A short explanation of the template and what it is used for.
Field List	Used to select which field from the given module will be inserting into the Variable Insert field to eventually be inserted into the template, which can be changed by updating the Related Module dropdown field.
From Address	What sender's email address will be shown on the email when received by the recipient. Note: Mail servers have the functionality to override this setting meaning the email address will show as

	the one that actually sends this, defined in Admin > Email Settings. Please review the Emails documentation for more information.
From Name	What sender's name will be shown on the email when received by the recipient.
Name	Identifying name of the template.
Related Module	List of modules related to the Target Module which will change the Field List and therefore change the fields that can be used for variables in the email.
Subject	The subject line of the email which will show for the recipients.
Target Module	Selected when creating the template and a non-editable field, this will cause the template show when using the template for workflows made to the corresponding module.
Type	Will only show as workflow, but will vary when making other template types to include Email and Campaign.
Value Type	Select "New Value" or "Old Value" if the variable will be changing on the workflow to determine if the variable should include the value of the field before or after the record is saved.
Variable Insert	This field will build the variable for you based on the Target Module, Related Module, Field List, and Value Type fields.

Creating Alert Templates

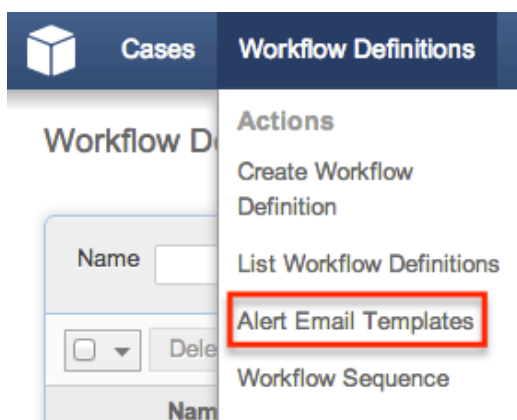
Alert Templates are created only via the Workflow module. Alert templates can be created either directly from the workflows module via the Alert Templates page, or via duplication. The Target Module is defined during the creation process, and then a full edit view layout opens including all fields that will be necessary to create the template.

Creating Alert Templates Via Workflows Module

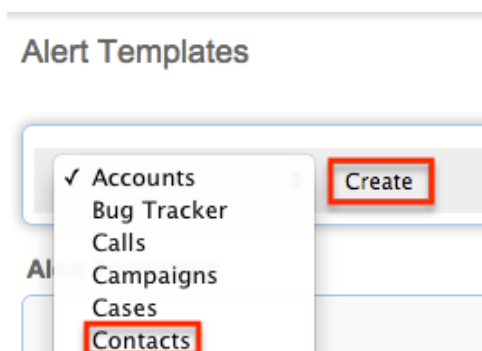
The most common method of template creation is via the Create option in the Workflow Templates option of the Workflow Definitions module tab. This will open the edit view layout allowing you to configure the template to your specifications.

Use the following steps to create the template via Workflow Management:

1. Navigate to Workflow Management via the Admin menu.
2. Hover over the Workflow Definitions module tab and select "Alert Email Templates".



3. Choose which module the template will be for using the provided dropdown list and click "Create".



4. Complete the fields on the screen as follows. Any required fields are marked with a red asterisk and must be completed:

Name : Enter an internal name for the email template.

Type : Keep as "Workflow".

From Name : The name that the email recipient will see as the sender.

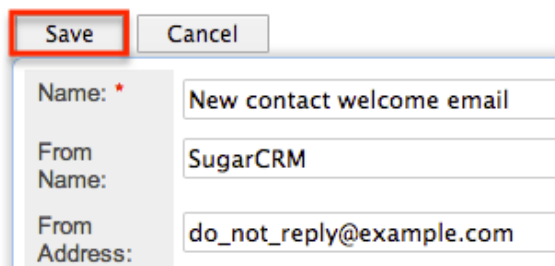
From Address : The email address that the email recipient will see as the sender.

Note: This may be overwritten by your mail server configured in Admin > [Email Settings](#).

Teams : Select the Sugar team(s) assigned to the email template.

Assigned To : The Sugar user assigned to the email template.
Description : Enter a description or other information about the template.
Subject : Enter the subject of the emails that will be sent.
Body : Enter the body of the emails that will be sent.

5. Populate the template body that will be sent to the email recipients. [Insert variables](#) as necessary for your workflows.
6. Using the TinyMCE functions, add simple formatting to your email's content. For more advanced customization you can click the HTML button in the top left to access and edit the generated HTML code. For more information on using TinyMCE, please refer to the [TinyMCE](#) section in the User Interface documentation in the Application guide. Note: If images or advanced CSS are required in your email template, it is highly recommended to host the images or CSS file on a publicly available hosting service and link to it in the email template.
7. Once the necessary information is entered, click "Save" to preserve your changes to the email template.



A screenshot of a web-based form for configuring an email template. At the top, there are two buttons: "Save" (highlighted with a red box) and "Cancel". Below the buttons are three input fields: "Name: *" with the value "New contact welcome email", "From Name:" with the value "SugarCRM", and "From Address:" with the value "do_not_reply@example.com".

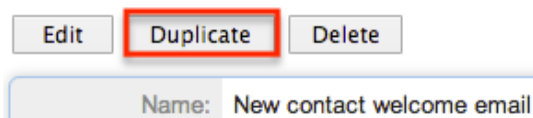
Creating Alert Templates Via Duplication

You can also create a new template by duplicating an existing template. The duplicate option is useful if the template you are creating has similar information to an existing template.

Use the following steps to create a template by duplicating an existing template:

1. Navigate to an existing template's detail view.
2. Click the action option for "Duplicate".

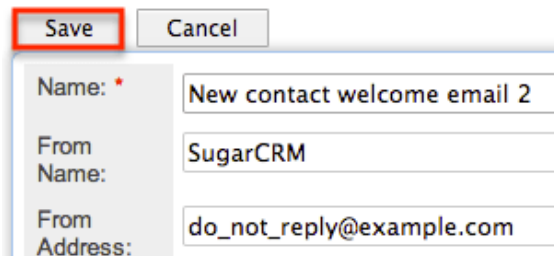
New contact welcome email



A screenshot of a web-based interface showing the detail view of an email template. At the top, there are three buttons: "Edit", "Duplicate" (highlighted with a red box), and "Delete". Below the buttons is a label "Name:" followed by the value "New contact welcome email".

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

New contact welcome email



Save Cancel

Name: * New contact welcome email 2

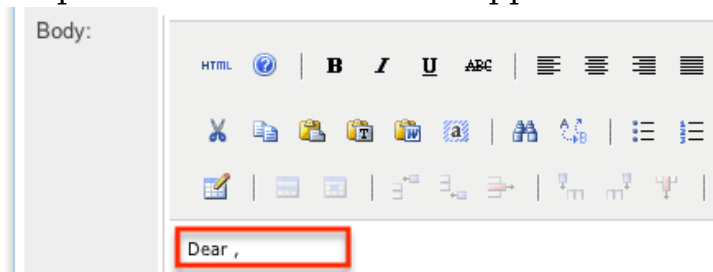
From Name: SugarCRM

From Address: do_not_reply@example.com

Inserting Variables

When constructing the subject and body of your email, Sugar allows you to insert variables, or placeholders, into the template that will be populated with the record's information for that variable. The variables allow you to insert data from fields within the record that triggered the workflow and its related records into your template. Use the following steps to insert a variable for the recipient's first name into the template:

- Click to place your cursor on the location in the subject or body where the recipient's first name should appear.



Body:

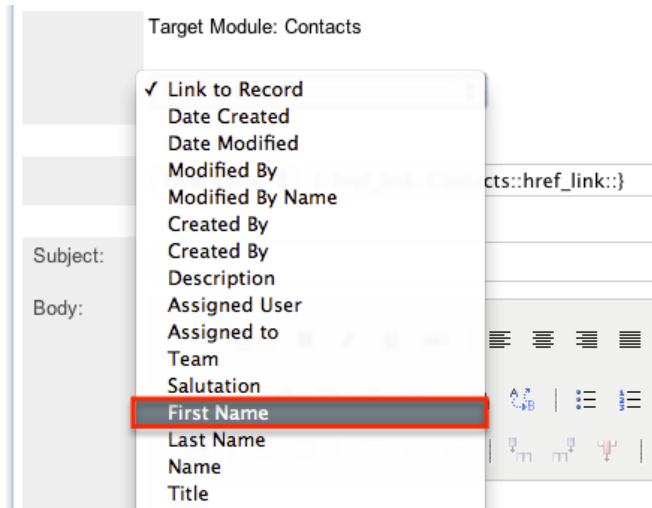
HTML | **B** | *I* | U | ABC | [List icons]

[Image icons]

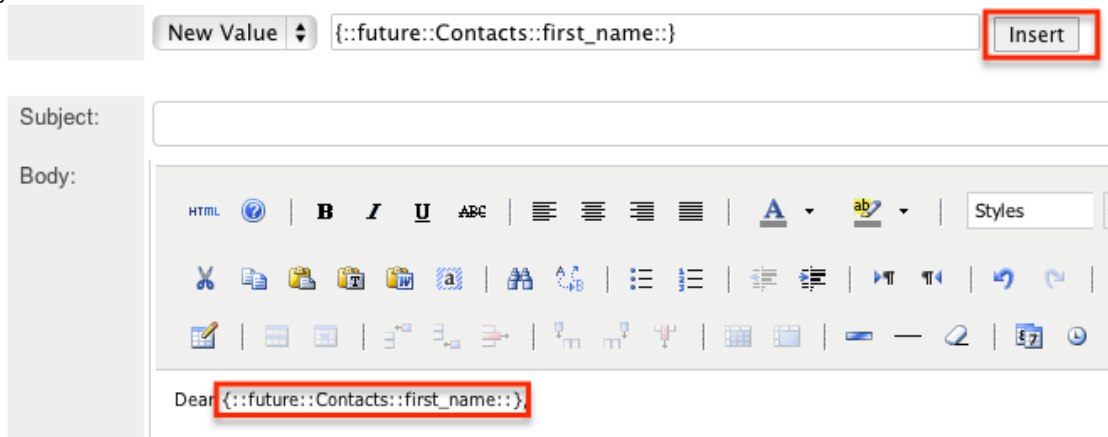
[Table icons]

Dear ,

- Set the variable dropdown to the desired field from the workflow's target module. For our example, select "First Name".



3. Choose between "New Value" and "Old Value" in the value dropdown field. This will determine if the value of the given variable shown on the template will be the value of the field in question before or after the workflow fired. This functionality is especially helpful if you are showing a change between two values, such as an opportunity moving from new ("Old Value") to closed-won ("New Value"). "New Value" is the default option for this list.
4. Click "Insert" to insert the generated variable name to your subject or body at your cursor's location.



Note: You can click "Alt Text" at the bottom of the page to have the plain text option send differently than the HTML text.

Viewing Alert Templates

There are various options available for viewing workflow templates in Sugar including via Workflow Templates list view, Workflow Templates detail view, and from the Emails module.

Viewing Alert Templates Via List View

The Workflow Templates list view displays all workflow templates and key fields about each template. To access the list view, simply navigate to the Workflow Management section of the Admin menu and select "Alert Email Templates" from the Workflow Definitions module tab. Use the Alert Templates list view for the following functions:

- To open the record in detail view, click the template's name
- To re-sort the list view results, one column at a time, click the column header and the the columns will sort alphabetically or chronologically
- Use the arrows in the top right side of the list view navigate through the pages of your templates, or skip to the first or last page using the double arrow buttons
- To delete a template, click "Remove" from the far right of the corresponding template's row

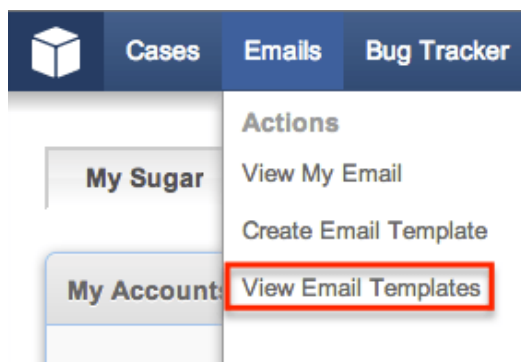
Viewing Alert Templates Via Detail View

The Contacts detail view displays thorough alert template information including all template fields and a preview of the workflow template that recipients will see after it is sent. The detail view can be reached by clicking a template's link from the Alert Templates list view.

While viewing the detail view, the preview of the email template is shown as the last field option. You can also click the "Alt Text" checkbox to see how this email will look when the recipient views it as plain text.

Viewing Alert Templates Via Emails Module

The Emails module contains all of the email templates in Sugar. Alert Templates can be accessed via Emails, in addition to accessing via Workflow Management. To access alert templates via Emails, simply select the "View Email Templates" option from the [Emails](#) module tab.



This will bring you to the [Email Templates list view](#) where you can select which template you would like to view. For more information on navigating the Emails module, please review the [Emails](#) module section of the Application Guide.

Editing Alert Templates

Alert Templates may be edited at any time to update or add information to the template. You can make changes to existing templates via the Alert Templates edit view. Edit view is accessible via the Alert Templates detail view. You can edit alert templates via the [detail view](#) by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve the changes made.

New contact welcome email

Edit Duplicate Delete

Name: New contact welcome email

Deleting Alert Templates

If an alert template is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Alert Templates detail view or list view. Deleting alert templates will not delete any workflows using them. If a workflow is utilizing a template which you are deleting, it is recommended that the workflow be updated to include a new template on the alert.

To delete a template from the template's detail use the following steps:

1. Navigate to the template's detail view
2. Select "Delete" from the Action buttons

New contact welcome email


Edit Duplicate **Delete**

Name: New contact welcome email

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

To delete a template from the list view, use the following steps

1. Navigate to the Alert Template detail view
2. Select the "Remove" button on the row of the template you would like to delete

Name	Base Module:	Description	Last Modified	
New contact welcome email	Contacts	Use this template for the new contact workflow	03/20/2013	

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

Workflow Sequence

When a record is saved within a module, Sugar will check all workflows for that module to see if they need to process and perform any actions or send any alerts. Sugar processes each of the workflows in a sequential order, one after another. By default this order is determined as the order in which the workflow definitions were created; the oldest workflow fires first, moving up to the newest. This order, however, can be reorganized using the Workflow Sequence menu.

Workflow Sequence can be accessed by the following process:

1. Navigate to Admin > Workflow Management
2. On the Workflow Definitions module tab, select "Workflow Sequence"
3. Select the module you would like to reorganize from the dropdown menu and click "Select"

Workflow Sequence

Please select a module:

- ✓ Accounts
- Opportunities
- Contacts

This process will produce a list view with all of the workflows for the particular selected module. The list view will show three columns containing details from the

Workflow Sequence: Accounts

Name	Execution Occurs:	Status	Process Order:
New Account Created	When record saved	Active	↑ up ↓ dn

The Process Order column is used to reorganize the workflows into their correct processing order. The "up" button will move the workflow up one rung in the process, whereas the "dn" button will lower it in the sequence. The order of the workflow process for this module is determined on this menu, starting at the top and working its way down.

Last Modified: 09/26/2015 06:25pm

Products and Quotes

Overview

The Products and Quotes configuration options in the Admin menu enable you to define a variety of options for the [Products](#) and [Quotes](#) modules. This menu in Admin contains menus to edit the following modules:

Menu Item	Description
Product Catalog	List of products sold by your organization; used as a template for Products module
Product Categories	Manage the categories in which your products are organized
Product Types	Manage the Type dropdown list in the Product Catalog
Manufacturers	Manage the Manufacturer ID dropdown list in the Product Catalog
Shipping Providers	Manage the Shipping Provider dropdown list in Quotes
Tax Rates	Manage the Tax Rate dropdown list in

Please note that only users with administrator or developer access have the ability to control the configurations within this documentation. This documentation will cover how to use the different Products and Quotes administrative modules to create and manage the options for users to choose when creating product and quote records in Sugar.

Product Catalog

Sugar's Product Catalog module contains a list of all products or services that your organization sells. This module provides the [Products](#) module with the template

used when creating products to be used for [Opportunities](#) and [Quotes](#), including pricing and cost information and information about the [manufacturer](#).

Products within the Product Catalog can be broadly classified into [product types](#), such as Software and Hardware. Each product type can be further organized into several [product categories](#). For example, the software product type can contain product categories such as Spreadsheets and Word Processors. You can also create sub-categories within a category.

Product Catalog Fields

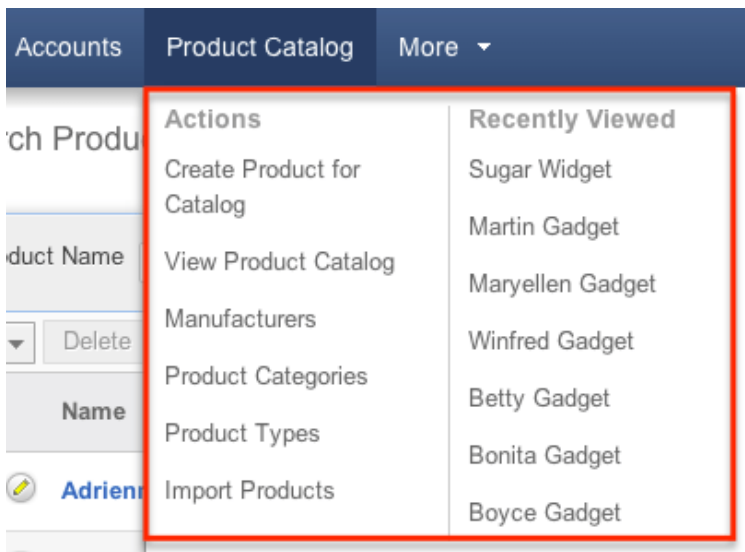
The Product Catalog contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Fields can be altered, added, or removed via Admin > Studio. For more information on configuring fields, please refer to the [Studio](#) documentation in the Administration guide.

Field	Description
Availability	Select if the item is in stock or not from the dropdown list.
Category Type	The product category to which the new item belongs.
Cost	The actual cost of the item. This will not appear on printed quotes.
Currency	The currency type of the given prices (Cost, List, Unit).
Date Available	Select the date of availability if the item is out of stock.
Date Created	The date the product catalog record was created.
Date Modified	The date the product catalog record was last modified.
Date-Cost-Price	The starting date that the cost is valid.
Default Pricing Formula	Select a formula from the dropdown list to arrive at the discount price for the Unit Price field. The formulas are as follows: <ul style="list-style-type: none">• Fixed Price: Allows you to enter a

	<p>Unit Price without any calculation.</p> <ul style="list-style-type: none"> • Profit Margin: Enter the points in the adjoining field to vary the percentage against the cost. • Markup over Cost: Choose a percentage to raise the price over the cost. • Discount from List: Enter the discount percentage from the List Price in the adjoining field. • Same as List: The Unit Price will be the same as the List Price.
Description	A description or other information about the product.
List Price	The quotable list price of the product.
Manufacturer ID	The manufacturer of the product.
Mft. Part Number	The manufacturer's part number for the product.
Product Name	The name of the product.
Product URL	The web address of product if it is available online.
Quantity in Stock	Enter the number of units that are in stock of the product.
Support Contact	The support person's contact information, such as the phone number or email address.
Support Desc.	Brief description or other information regarding the support provided.
Support Name	The name of the Customer Support person.
Support Term	The term (e.g. six months, one year, etc.) in which support will be provided for the product.
Tax Class	Tax classification (e.g. taxable, non-taxable) for the product.
Type	The specified product type .
Unit Price	The unit price of the product.
Vendor Part Number	The vendor's part number for the product.
Weight	The weight of the product.

Product Catalog Module Tab

The Product Catalog module tab can be accessed by clicking the Product Catalog option in the Admin menu. Click the tab to access the Product Catalog [list view](#). You may also hover on the tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of product catalog records you last viewed in the module.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Product for Catalog	Opens the edit view layout to create a new product for the catalog
View Product Catalog	Opens the list view layout to search and display the product catalog
Manufacturers	Opens the Manufacturers list view
Product Categories	Opens the Product Categories list view
Product Types	Opens the Product Types list view
Import Products	Opens the import wizard to create or update product catalog entries using external data

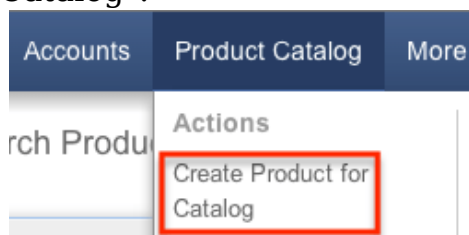
Creating Products For Catalog

There are various methods for creating products in the Product Catalog including via the Product Catalog module, duplication, and importing products. The full edit view layout opens when creating the product directly from the Products menu and includes all of the relevant fields for your organization's products. The Edit View layout can be configured via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#) section of this documentation.

Creating Via Product Catalog

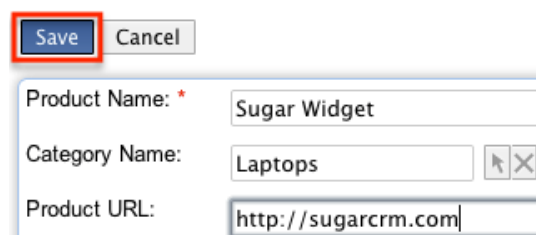
One of the most common methods of product creation is via the Create Product for Catalog option in the Product Catalog module tab. This opens up the edit view layout which allows you to enter in all the relevant information for the product. Use the following steps to create a product via the Product Catalog module:

1. Navigate to Admin > Product Catalog.
2. Hover on the Product Catalog module and select "Create Product for Catalog".



3. Enter appropriate values for the [fields](#) in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
4. Once the necessary information is entered, click "Save".

Create

A screenshot of a product creation form. At the top left, there are two buttons: 'Save' and 'Cancel'. The 'Save' button is highlighted with a red rectangular box. Below the buttons, there are three input fields: 'Product Name: *' with the value 'Sugar Widget', 'Category Name:' with the value 'Laptops' and a dropdown arrow, and 'Product URL:' with the value 'http://sugarcrm.com'.

Creating Via Duplication

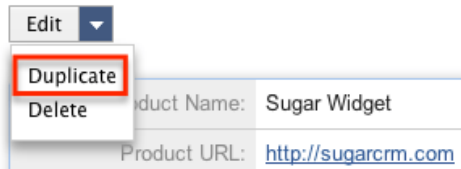
You can also create a new product for the catalog by duplicating an existing record. The duplicate option is useful if the product you are creating has similar information to an existing product.

Use the following steps to create a product for the catalog by duplicating an

existing record:

1. Navigate to a product catalog record's detail view.
2. Click the Actions menu and select "Duplicate".

Sugar Widget



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

Create

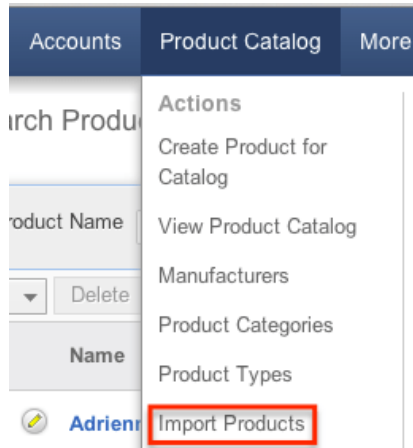
A screenshot of a product edit form. At the top, there are 'Save' and 'Cancel' buttons, with 'Save' highlighted by a red box. Below the buttons, there are two input fields: 'Product Name: *' with the value 'Sugar Widget' and 'Category Name:' with the value 'Laptops'.

Importing Products for Catalog

The import function allows you to push multiple product records into the product catalog in Sugar using a comma (or other character) delimited file instead of creating them one-by-one. For more information on importing, please refer to the documentation.

Use the following steps to import products into the catalog via the Import Products option:

1. Hover on the Product Catalog module tab and select "Import Products".



2. In Step 1, select the import file and choose "Create new records only". Click "Next".
3. In Step 2, confirm the import file properties. Click "Next".
4. In Step 3, confirm the field mappings for the import. Click "Next".
5. In Step 5, view the import results.

- The Created Records tab will show all of the new product records.
- The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
- The Errors tab will show records that were not imported due to errors detected during import.

Viewing Products In Catalog

There are various options available for viewing product catalog records in Sugar including via Product Catalog list view, Product Catalog detail view, and Product Catalog Last Viewed menu.

Viewing Via List View

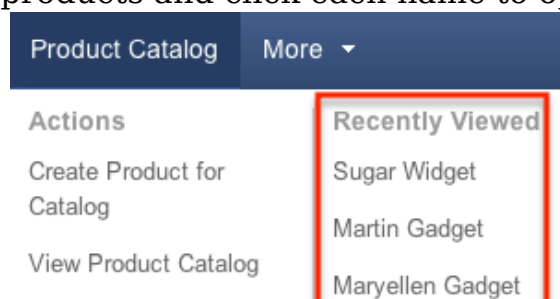
The Product Catalog list view displays all product catalog records meeting the current search criteria. To access the list view, simply click the Product Catalog module tab. While list view shows key product catalog fields, you can click the product's name to open the record in detail view. For more information on viewing products via list view, please refer to the [Product Catalog List View](#) section of this documentation.

Viewing Via Detail View

The Product Catalog detail view displays thorough product information including all product catalog fields followed by subpanels of the product's related records belonging to various modules. The detail view can be reached by clicking a product catalog record's link from anywhere in the application including from the Product Catalog list view. For more information on viewing products via detail view, please refer to the [Product Detail View](#) section of this documentation.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which products you have recently viewed. Hover on the Product Catalog module tab to see a list of your most recently viewed products and click each name to open the product in detail view.



Searching Product Catalog

The Product Catalog list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Product Catalog list view below. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the [Search](#) documentation.

Basic Search

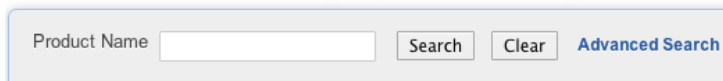
Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional

search functionality as needed.

The buttons and checkboxes available in Basic Search panel have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.

Search Product Catalog



The image shows a search interface with a text input field labeled 'Product Name', a 'Search' button, a 'Clear' button, and a link for 'Advanced Search'.

Once the search is complete, the relevant results will populate in the [Product Catalog List View](#) below the search panel. To see all product catalog records, simply click "Clear" and then "Search" to perform a blank search with no filters.

You can configure what fields appear on the Product Catalog Basic Search via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Advanced Search

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

The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the [Layout Options](#) section of the Search documentation.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the [Saved Search](#) section of the Search documentation.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you enter in a product name to search and a vendor part number, Sugar will only return product records with a matching name and part number. When searching by a multiselect or dropdown field (e.g. "Type"), however, Sugar will return records matching any of these selections. Once the search completes, the relevant results will populate in the [Product Catalog List View](#) below the search panel. To see all product catalog records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters.

You can configure what fields appear on the Product Catalog Advanced Search via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Product Catalog List View

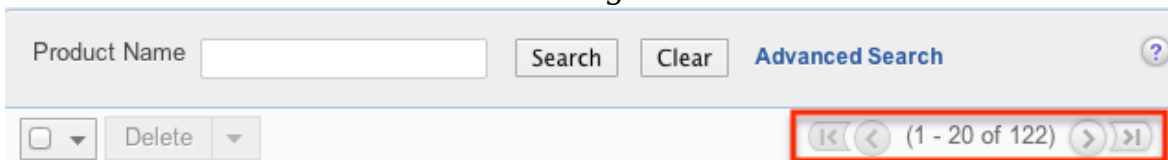
The Product Catalog list view displays all product catalog records meeting the current search criteria. You can view the basic details of each product within the field columns.

You have the option to change what fields are displayed in list view by configuring your layout options in the Product Catalog Advanced Search. For more information on configuring your list view, please refer to the [Layout Options](#) section of the Search documentation. You can also change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Pagination

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

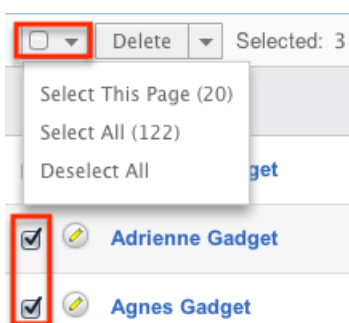
By default, Sugar displays 20 records per list view page, but you can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.



Checkbox Selection

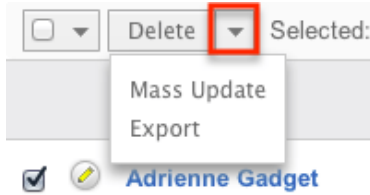
You can perform several actions on product catalog records directly from the list view by first selecting the desired records. To select individual product catalog records on the Product Catalog list view, mark the checkbox on the left of each row. To select or deselect multiple product records on the list view, use the options in the checkbox dropdown menu:

- **Select This Page** : Selects all records shown on the current page of product catalog results.
- **Select All** : Selects all records in the current search results across all pages of product catalog results.
- **Deselect All** : Deselects all records that are currently selected.



Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.

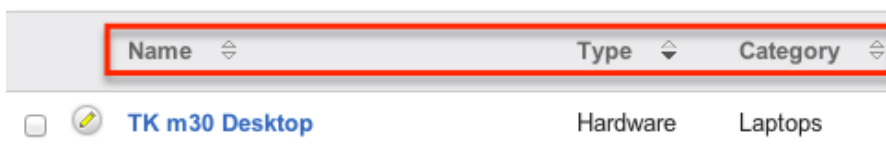


The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Delete	Delete one or more product catalog records at a time
Mass Update	Mass update one or more product catalog records at a time
Export	Export one or more product catalog records to a CSV file

Column Sorting

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



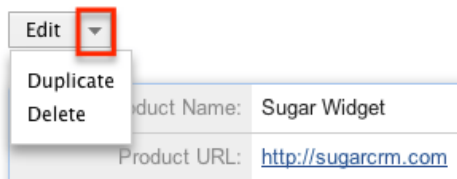
Product Detail View

The Product Catalog detail view displays thorough product information including all product fields. The detail view can be reached by clicking a product record's link in the Product Catalog list view. You have the ability to change the detail view by configuring the layout via [Admin > Studio](#). For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Actions Menu

The Actions menu on the top left of each product's detail view allows you to perform various actions on the current record. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the [System](#) documentation in the Administration guide.

Sugar Widget

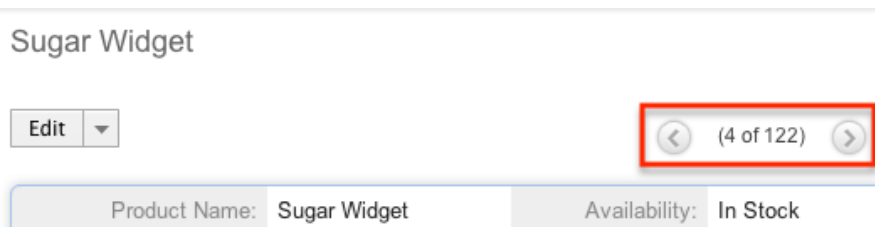


The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Edit	Edit this product
Duplicate	Duplicate this product
Delete	Delete this product

Next or Previous Record

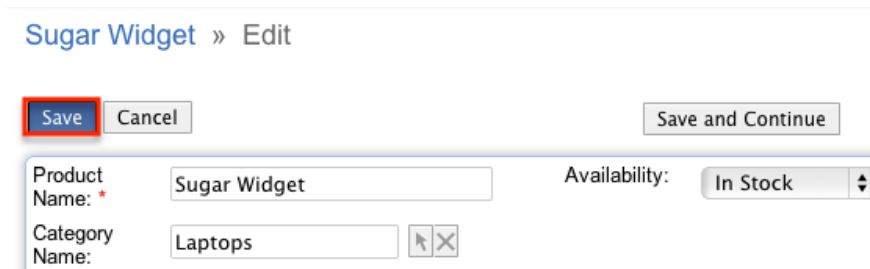
On the upper right of the Product Catalog detail view, there are two buttons that allow you to page through each product in the Product Catalog list view's current search results. Clicking the Previous button displays the previous product of the current search results while clicking the Next button displays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



Editing Products

The Product Catalog may be edited at any time to update or add information to the record. You can make changes to existing product catalog records via the Product Catalog edit view. Edit view is available within the Products module and includes

all of the Product fields you should need.



The screenshot shows the 'Sugar Widget » Edit' form. At the top, there are three buttons: 'Save' (highlighted with a red box), 'Cancel', and 'Save and Continue'. Below the buttons, the form contains the following fields: 'Product Name: *' with the value 'Sugar Widget', 'Availability:' with a dropdown menu set to 'In Stock', and 'Category Name:' with the value 'Laptops' and a clear button (X).

You may configure the Product Catalog edit view via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#) documentation in the Administration guide.

Editing Via Detail View

You can edit products via the [detail view](#) by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve the changes made.


Sugar Widget

Edit ▼

Product Name:	Sugar Widget
Product URL:	http://sugarcrm.com

Editing Via List View

You can edit the product catalog via the [list view](#) by clicking the Pencil icon to the left of each product's name. A pop-up window will open containing the contents of the edit view layout. Update the necessary fields, then click "Save" to preserve your changes.

Name	Type	Category	Availability
 Sugar Widget	Devices	Laptops	In Stock

Deleting Products

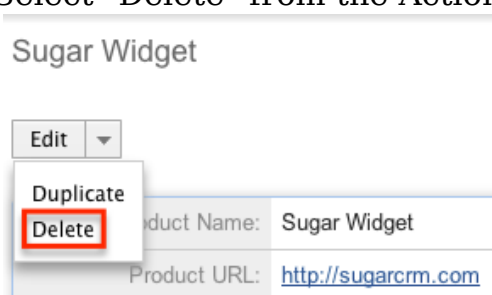
If a product record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Product Catalog detail view or

list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once.

Deleting Via Detail View

Use the following steps to delete a product catalog record via the detail view:

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

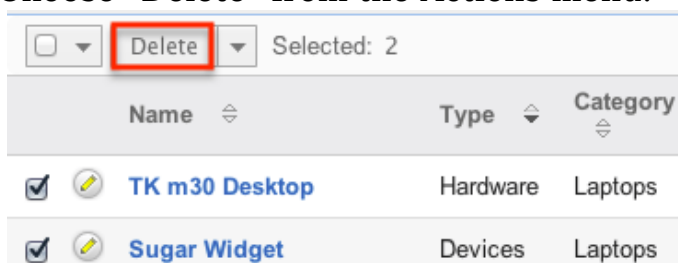


3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Mass Deleting Via List View

Use the following steps to delete one or more product catalog records via the list view:

1. Navigate to the Product Catalog list view by navigating to Admin > Product Catalog.
2. Use the [Basic](#) or [Advanced Search](#) to find the Product Catalog records you wish to delete.
3. Select the desired product catalog records individually or using the [checkbox dropdown's](#) options.
4. Choose "Delete" from the Actions menu.



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

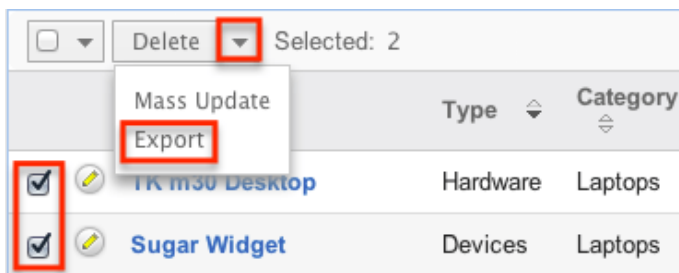
Due to PHP memory limitations on the server, there may be occasions when the application times out while deleting a large number of product catalog records. If you encounter an error when performing this action, we recommend selecting the

records in smaller batches.

Exporting Products

Sugar's Export option allows users to download all fields for the selected products to their computers as a CSV (comma-separated values) file. This may be useful when needing to use Product Catalog data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered products back into Sugar. For more information on updating existing records via import, please refer to the [Import](#) documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of product records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Products may be exported from the Product Catalog list view by selecting "Export" from the Actions menu.



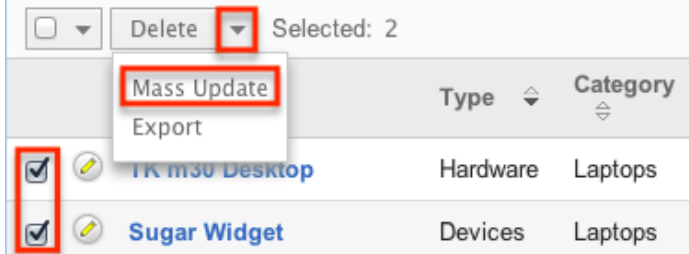
Mass Updating Products

Mass Updating allows users to make the same change to multiple product catalog records at once from the Product Catalog list view. Users with administrator or developer level access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the [Studio](#) documentation in the Administration guide. Due to the PHP memory limitations on the server, there may be occasions when the application times out while mass updating a large number of product catalog records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Use the following steps to mass update product catalog records from the list view:

1. Navigate to the Product Catalog list view by navigating to Admin > Product Catalog.

2. Use the list view's [Basic](#) or [Advanced Search](#) to identify products you wish to modify.
3. Select the desired products individually or using the [checkbox dropdown's](#) options.
4. Choose "Mass Update" from the Actions menu.



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



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

Product Categories

The Product Categories module allows you to create categories to group records under a Product Type. This is one of the levels of organization you can use for the products and services that your organization offers, and will contain multiple entries from the [product catalog](#).

Product Category Fields

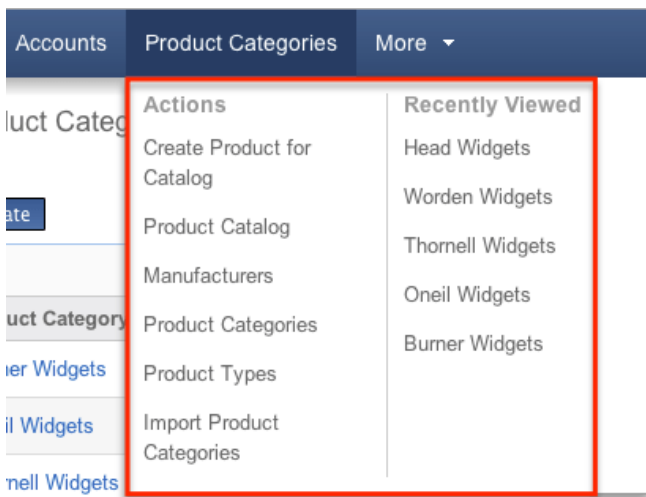
The Product Category module contains four stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields.

Field	Description
Product Category	The category's name as it will appear on the Product Category dropdown list
Parent Category	Select a parent product category if this product category is a sub-set of another

	category
Description	A description or other information about the product category
Order	Enter a number to specify the order in which this category will appear in the Product Category dropdown list

Product Category Module Tab

The Product Category module tab can be accessed by clicking the Product Category option in the Admin menu. Click the tab to access the Product Category list view. You may also hover on the tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of product category records you last viewed in the module.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Product for Catalog	Opens Product Catalog to create a new product for the catalog
Product Catalog	Opens the Product Catalog list view
Manufacturers	Opens the Manufacturers list view
Product Categories	Opens the Product Categories list view
Product Types	Opens the Product Types list view
Import Product Categories	Opens the import wizard to create or update product categories using external data

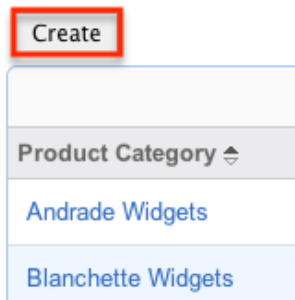
Creating Product Categories

Product categories can be created either via the Product Category module or by importing categories. When creating via the Product Categories module, the full edit view layout opens below the Product Category list view and includes all of the fields for your categories.

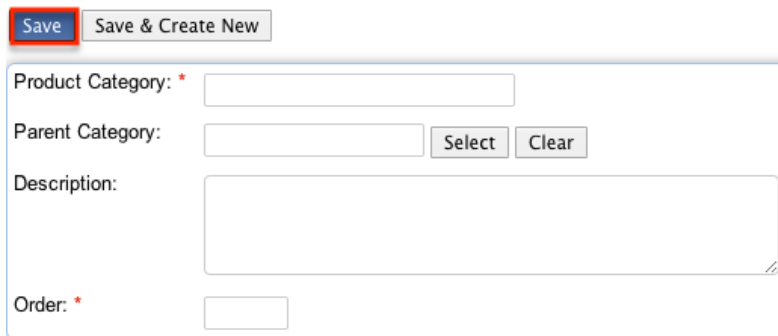
Use the following steps to create a product category via the Product Category module:

1. Navigate to Admin > Product Categories.
2. Click on "Create" above the list view.

Product Categories



3. Enter appropriate values for the [fields](#) in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
4. Once the necessary information is entered, click "Save". If you would like to create a new category, click "Save & Create New".

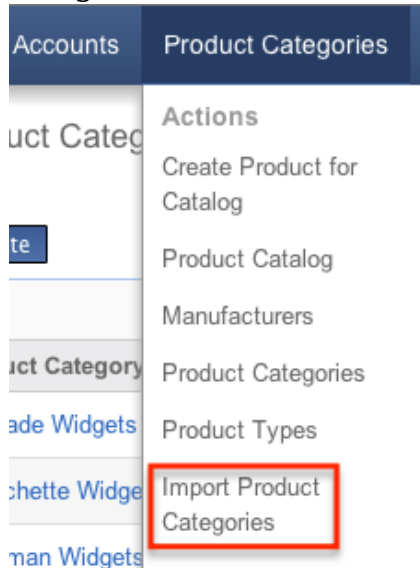
A screenshot of the 'Product Category' edit view layout. At the top left, there is a 'Save' button highlighted with a red rectangular box, and next to it is a 'Save & Create New' button. Below the buttons are several form fields: 'Product Category: *' with a text input field; 'Parent Category:' with a dropdown menu and 'Select' and 'Clear' buttons; 'Description:' with a large text area; and 'Order: *' with a text input field.

Importing Product Categories

The import function allows you to push multiple product categories into Sugar using a comma (or other character) delimited file instead of creating them one-by-one. For more information on importing, please refer to the [Import](#) documentation.

Use the following steps to import product categories into Sugar via the Import Product Categories option:

1. Hover on the Product Categories module tab and select "Import Product Categories".



2. In Step 1, select the import file and choose "Create new records only". Click "Next".
3. In Step 2, confirm the import file properties. Click "Next".
4. In Step 3, confirm the field mappings for the import. Click "Next".
5. In Step 5, view the import results.

- The Created Records tab will show all of the new product categories.
- The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
- The Errors tab will show records that were not imported due to errors detected during import.

Product Categories List View

The Product Categories list view displays all product category records. You can view the basic details of each product category within the field columns. You can also click on a category's name to [edit](#) it, or [delete](#) the category by clicking the "Delete" button at the end of the row.

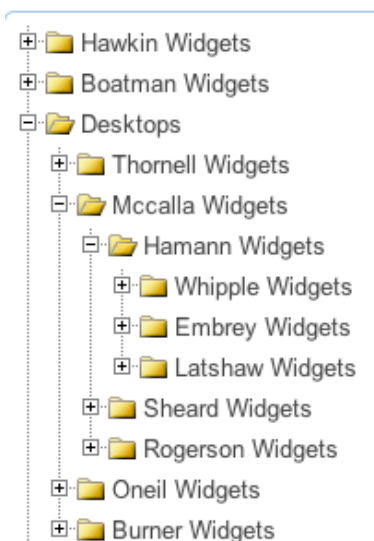
Column Sorting

List view provides the ability to sort all product categories by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time.

Product Category ↕	Description	Order ↕
Desktops	Mac or PC	1

Ordering Product Categories

The Order field in Product Categories is used in conjunction with the Parent Category [field](#) to define the subordinate and parent category options when viewing the Product Category tree when editing the Product Category field of a [Product Catalog](#) record.



Within each group, the Order field allows you to organize what order the subordinate categories display under the parent category, with 1 being the highest on the list and moving down as the order number increases.

Editing Product Categories

Product Categories may be edited at any time to update or add information to the record. You can make changes to existing product category records via the Product Category edit view. Edit view is available within the Product Categories module, below the list view, and includes all of the category fields you should need.

Embrey Widgets Delete

(1 - 20 of 43)

Desktops

Save Save & Create New

Product Category: *

Parent Category: Select Clear

Description:

Order: *

Deleting Product Categories

If a product category is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from the Product Catalog list view.

Use the following steps to delete a product category via the list view:

1. Navigate to a Product Categories list view.
2. Locate the category that you would like to delete.
3. Click "Delete" on the corresponding category's row.

Product Category	Description	Order	
Desktops	Mac or PC	1	Delete

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

Product Types

The Product Type module controls the Type dropdown list in the [Product Catalog fields](#). In addition to [product categories](#), Type allows you to define the classification of a product or service that is being offered on a product catalog record.

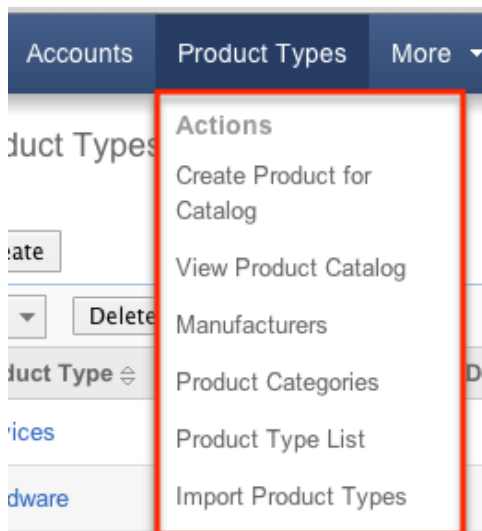
Product Type Fields

The Product Type module contains three stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields.

Field	Description
Product Type	The category's name as it will appear on the Product Category dropdown list
Description	A description or other information about the product
Order	Enter a number to specify the order in which this category will appear in the Product Type dropdown list

Product Types Module Tab

The Product Category module tab can be accessed by clicking the Product Category option in the Admin menu. Click the tab to access the Product Category list view. You may also hover on the tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of product category records you last viewed in the module.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Product for Catalog	Opens the Product Catalog to create a new product for the catalog
View Product Catalog	Opens the Product Catalog list view
Manufacturers	Opens the Manufacturers list view

Product Categories	Opens the Product Categories list view
Product Type List	Opens the Product Types list view
Import Product Types	Opens the import wizard to create or update product types using external data

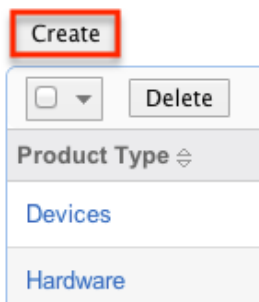
Creating Product Types

Product types can be created either via the Product Type module or by importing types. When creating via the Product Types module, the full edit view layout opens below the Product Type list view and includes all of the fields for your types.

Use the following steps to create a product type via the Product Types module:

1. Navigate to Admin > Product Types.
2. Click on "Create" above the list view.

Product Types



3. Enter appropriate values for the [fields](#) in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
4. Once the necessary information is entered, click "Save". If you would like to create a new type, click "Save & Create New".

Product Type: Support Contract

 A screenshot of the 'Product Type: Support Contract' edit view layout. At the top left, there are two buttons: 'Save' (highlighted with a red box) and 'Save & Create New'. Below the buttons, the form contains the following fields:

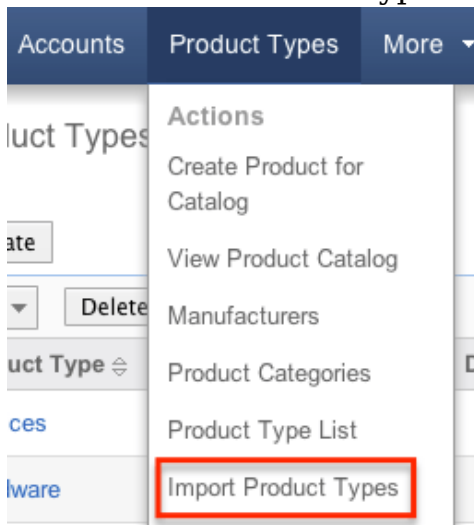
- 'Product Type: *' with a text input field containing 'Support Contract'.
- 'Description:' with a large text area containing 'For customers purchasing support'.
- 'Order: *' with a text input field containing '3' and a tooltip that reads 'Set the order in which this type will appear in the Product Type dropdown lists'.

Importing Product Types

The import function allows you to push multiple product types into Sugar using a comma (or other character) delimited file instead of creating them one-by-one. For more information on importing, please refer to the [Import](#) documentation.

Use the following steps to import product types into Sugar via the Import Product Types option:

1. Hover on the Product Types module tab and select "Import Product Types".



2. In Step 1, select the import file and choose "Create new records only". Click "Next".
3. In Step 2, confirm the import file properties. Click "Next".
4. In Step 3, confirm the field mappings for the import. Click "Next".
5. In Step 5, view the import results.

- The Created Records tab will show all of the new product types.
- The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
- The Errors tab will show records that were not imported due to errors detected during import.

Product Types List View

The Product Types list view displays all product type records. You can view the

basic details of each product type within the field columns. You can also click on a category's name to [edit](#) it, or [delete](#) the category by clicking the "Delete" button at the end of the row.

Column Sorting

List view provides the ability to sort all product types by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time.

Product Type ⇅	Description	Order ⇅
Support Contract	For customers purchasing support	3

Ordering Product Types

The Order field in Product Types defines the order of the different type options when viewing the Type dropdown list of a [Product Catalog](#) record. The Order field allows you to organize what order the dropdown list will display, with 1 being the highest on the list and moving down as the order number rises. When [creating](#) new product type record options, the Order field will automatically increment to the next number in the list, thereby adding the new option to the bottom of the list. The Order field can be overwritten with another number if you would like to manually re-order the options.

Editing Product Types

Product Categories may be edited at any time to update or add information to the record. You can make changes to existing product category records via the Product Category edit view. Edit view is available within the Product Categories module, below the list view, and includes all of the category fields you should need.

Devices 1

(1 - 3 of 3)

Product Type: Support Contract

Product Type: *

Description:

Order: * *Set the order in which this type will appear in the Product Type dropdown lists*

Deleting Product Types

If a product type is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from the Product Types list view.

Use the following steps to delete a product type via the detail list:

1. Navigate to a Product Types list view.
2. Locate the type that you would like to delete.
3. Click "Delete" on the corresponding type's row.

Product Type ⇅	Description	Order ⇅	
Support Contract	For customers purchasing support	3	<input type="button" value="Delete"/>

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

Manufacturers

The Manufacturers module controls and maintains the Manufacturer dropdown list in the [Product Catalog](#) module. This dropdown list allows you to select from a list of the manufacturers you use to classify your products and specify from which manufacturer they are produced.

Manufacturers Fields

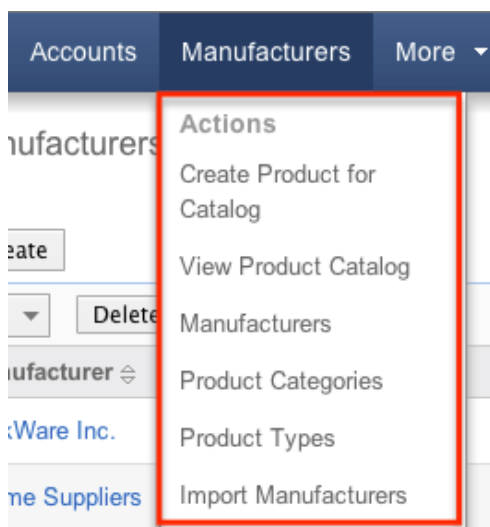
The Manufacturers module contains three stock fields which come out-of-the-box

with Sugar. The below definitions are suggested meanings for the fields.

Field	Description
Manufacturer	The manufacturer's name as it will appear on the Manufacturer ID dropdown list
Status	Choose whether this manufacturer's name should show on the Manufacturer ID dropdown list
Order	Enter a number to specify the order in which this category will appear in the Manufacturer ID dropdown list

Manufacturers Module Tab

The Manufacturers module tab can be accessed by clicking the Manufacturers option in the Admin menu. Click the tab to access the Manufacturers list view. You may also hover on the tab to display the Actions menu. The Actions menu allows you to perform important actions within the module.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Product for Catalog	Opens the Product Catalog to create a new product for the catalog
View Product Catalog	Opens the Product Catalog list view
Manufacturers	Opens the Manufacturers list view

Product Categories	Opens the Product Categories list view
Product Types	Opens the Product Types list view
Import Manufacturers	Opens the import wizard to create or update manufacturers using external data

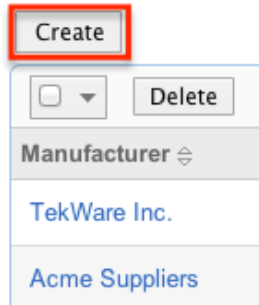
Creating Manufacturers

Manufacturers can be created either via the Manufacturers module or by importing Manufacturers. When creating via the Manufacturers module, the full edit view layout opens below the Manufacturers list view and includes all of the fields for your manufacturers.

Use the following steps to create a manufacturer via the Manufacturers module:

1. Navigate to Admin > Manufacturers.
2. Click on "Create" above the list view.

Manufacturers



3. Enter appropriate values for the [fields](#) in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
4. Once the necessary information is entered, click "Save". If you would like to create a new manufacturer, click "Save & Create New".

Manufacturer: Acme Suppliers

 A screenshot of the manufacturer edit form. At the top, there are two buttons: 'Save' and 'Save & Create New', both highlighted with red rectangular boxes. Below the buttons, the form contains three fields:

- 'Manufacturer: *' with a text input field containing 'Acme Suppliers'.
- 'Status: *' with a dropdown menu set to 'Active' and a tooltip that reads 'Set status to Inactive to remove this manufacturer from the Manufacturer dropdown lists'.
- 'Order:' with a text input field containing '1' and a tooltip that reads 'Set the order this manufacturer will appear in the Manufacturer dropdown lists'.

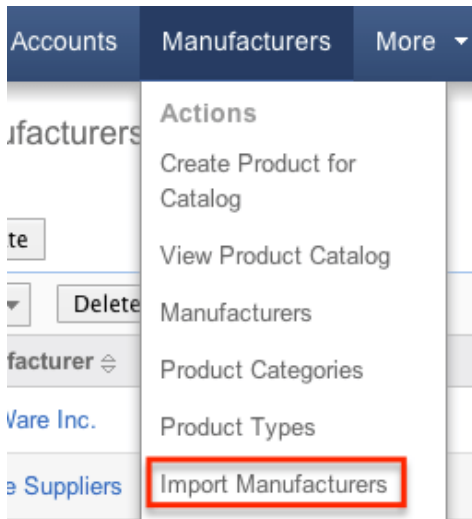
Importing Manufacturers

The import function allows you to push multiple manufacturers into Sugar using a

comma (or other character) delimited file instead of creating them one-by-one. For more information on importing, please refer to the [Import](#) documentation.

Use the following steps to import manufacturers into Sugar via the Import Manufacturers option:

1. Hover on the Manufacturers module tab and select "Import Manufacturers".



2. In Step 1, select the import file and choose "Create new records only". Click "Next".
3. In Step 2, confirm the import file properties. Click "Next".
4. In Step 3, confirm the field mappings for the import. Click "Next".
5. In Step 5, view the import results.

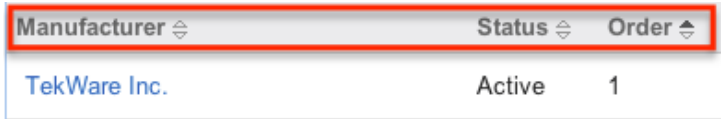
- The Created Records tab will show all of the new manufacturers.
- The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
- The Errors tab will show records that were not imported due to errors detected during import.

Manufacturers List View

The Manufacturers list view displays all manufacturers records. You can view the basic details of each manufacturer within the field columns. You can also click on a manufacturer's name to [edit](#) it, or [delete](#) the manufacturer by clicking the "Delete" button at the end of the row.

Column Sorting

List view provides the ability to sort all manufacturers by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time.



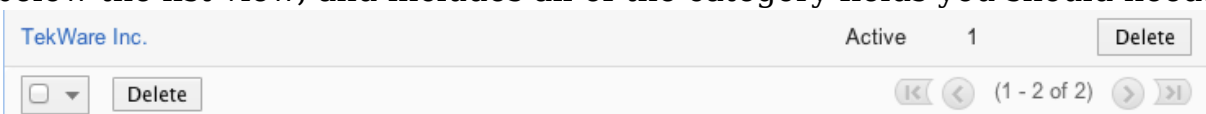
Manufacturer ↕	Status ↕	Order ↕
TekWare Inc.	Active	1

Ordering Manufacturers

The Order field in Manufacturers defines the order of the different type options when viewing the Manufacturer ID dropdown list of a [Product Catalog](#) record. The Order field allows you to organize what order the dropdown list will display, with 1 being the highest on the list and moving down as the order number rises. When [creating](#) new manufacturer record options, the Order field will automatically increment to the next number in the list, thereby adding the new option to the bottom of the list. The Order field can be overwritten with another number if you would like to manually re-order the options.

Editing Manufacturers

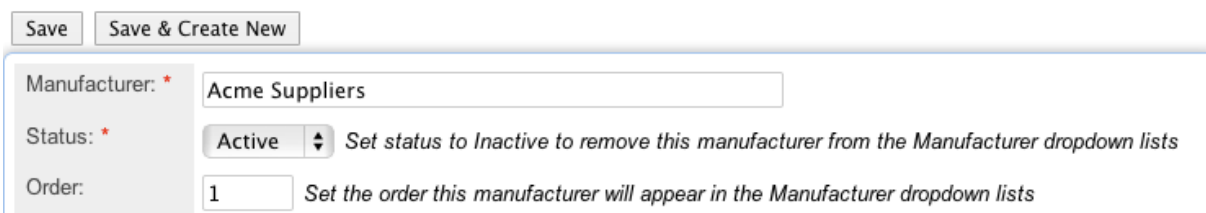
Manufacturers may be edited at any time to update or add information to the record. You can make changes to existing product category records via the Manufacturers edit view. Edit view is available within the Manufacturers module, below the list view, and includes all of the category fields you should need.



TekWare Inc. Active 1 Delete

Delete (1 - 2 of 2)

Manufacturer: Acme Suppliers



Save Save & Create New

Manufacturer: * Acme Suppliers

Status: * Active Set status to Inactive to remove this manufacturer from the Manufacturer dropdown lists

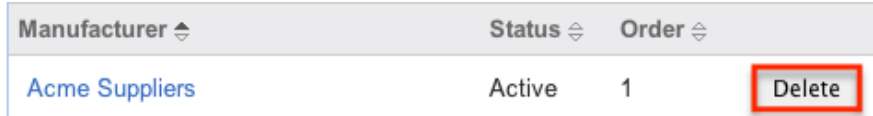
Order: 1 Set the order this manufacturer will appear in the Manufacturer dropdown lists

Deleting Manufacturers

If a manufacturer is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from the Manufacturers list view.

Use the following steps to delete a manufacturer via the list view:

1. Navigate to a Manufacturers list view.
2. Locate the manufacturer that you would like to delete.
3. Click "Delete" on the corresponding manufacturer's row.



The screenshot shows a table with three columns: 'Manufacturer', 'Status', and 'Order'. The first row contains the text 'Acme Suppliers', 'Active', and '1'. A red rectangular box highlights the 'Delete' button located at the end of the first row.

Manufacturer	Status	Order
Acme Suppliers	Active	1

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

Shipping Providers

The Shipping Providers module controls and maintains the Shipping Provider dropdown list in the [Quotes](#) module. This dropdown list allows you to determine how you are going to transport the purchased products or services to the customer.

Shipping Provider Fields

The Shipping Provider module contains three stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields.

Field	Description
Shipping Provider	The provider's name as it will appear on the Shipping Provider dropdown list
Status	Choose whether this provider's name should show on the Shipping Provider dropdown list
Order	Enter a number to specify the order in which this category will appear in the Shipping Provider dropdown list

Creating Shipping Providers

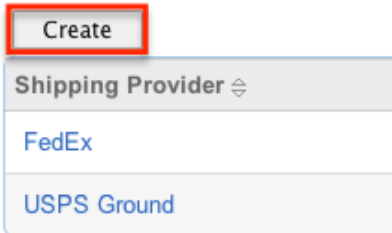
Shipping providers can be created via the Shipping Providers menu through the Admin menu. When creating via the Shipping Providers menu, the full edit view layout opens below the Shipping Providers list view and includes all of the fields for your providers.

Use the following steps to create a shipping provider via the Shipping Providers module:

1. Navigate to Admin > Shipping Providers.
2. Click on "Create" above the list view.

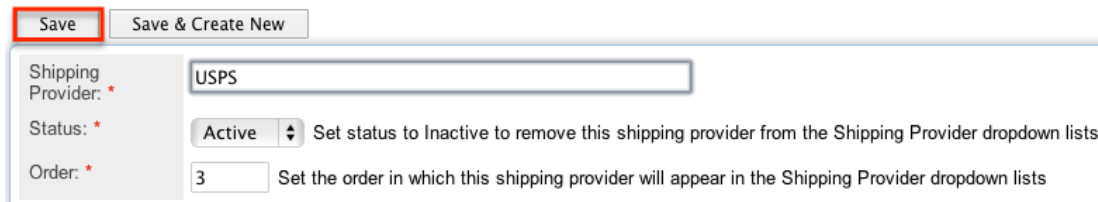
Shipping Provider: Home

Shipping Provider List



3. Enter appropriate values for the [fields](#) in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
4. Once the necessary information is entered, click "Save". If you would like to create a new provider, click "Save & Create New".

Shipping Provider:



Save Save & Create New

Shipping Provider: *

Status: * Set status to Inactive to remove this shipping provider from the Shipping Provider dropdown lists

Order: * Set the order in which this shipping provider will appear in the Shipping Provider dropdown lists

Shipping Providers List View

The Shipping Providers list view displays all shipping provider records. You can view the basic details of each provider within the field columns. You can also click on a provider's name to [edit](#) it, or [delete](#) the provider by clicking the "Delete" button at the end of the row.

Column Sorting

List view provides the ability to sort all shipping providers by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time.



Shipping Provider	Status	Order
FedEx	Active	1

Ordering Shipping Providers

The Order field in Shipping Providers defines the order of the different shipping providers options when viewing the Shipping Provider dropdown list of a quote. The Order field allows you to organize what order the dropdown list will display, with 1 being the highest on the list and moving down as the order number rises. When creating new shipping provider record options, the Order field will automatically increment to the next number in the list, thereby adding the new option to the bottom of the list. The Order field can be overwritten with another number if you would like to manually re-order the options.

Editing Shipping Providers

Shipping providers may be edited at any time to update or add information to the record. You can make changes to existing shipping provider records via the Shipping Providers edit view. Edit view is available within the Shipping Providers menu, below the list view, and includes all of the provider fields you should need.

The screenshot shows the edit view for a shipping provider named 'FedEx'. At the top, there is a header bar with 'USPS Ground' on the left, 'Active' and '2' in the middle, and a 'delete' button on the right. Below this, the title 'Shipping Provider: FedEx' is displayed. There are two buttons: 'Save' and 'Save & Create New'. The main form area contains three fields: 'Shipping Provider: *' with a text input containing 'FedEx', 'Status: *' with a dropdown menu set to 'Active' and a tooltip that says 'Set status to Inactive to remove this shipping provider from the Shipping Provider dropdown lists', and 'Order: *' with a text input containing '1' and a tooltip that says 'Set the order in which this shipping provider will appear in the Shipping Provider dropdown lists'.

Deleting Shipping Providers

If a shipping provider is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from the Shipping Providers list view.

Use the following steps to delete a shipping provider via the detail list:

1. Navigate to the Shipping Providers list view.
2. Locate the provider that you would like to delete.
3. Click "Delete" on the corresponding provider's row.

The screenshot shows a table with three columns: 'Shipping Provider', 'Status', and 'Order'. The first row contains 'FedEx', 'Active', and '1'. A red box highlights the 'delete' button in the first row.

Shipping Provider	Status	Order	
FedEx	Active	1	

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

Tax Rates

The Tax Rates module controls and maintains the Tax Rates dropdown list in the [Quotes](#) module. This dropdown list allows you to apply applicable taxes to quotes so that the grand total is representative of any added tax to the subtotal. Tax rates can be added to the dropdown list as any necessary percentage, so they will be able to include national and international rates.

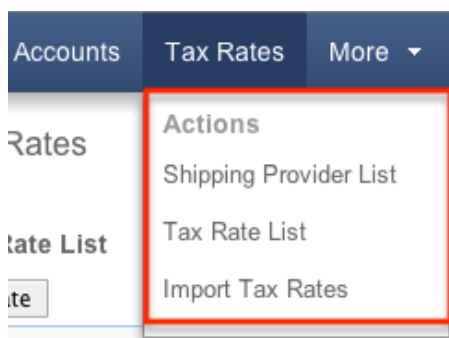
Tax Rate Fields

The Tax Rate module contains four stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields.

Field	Description
Tax Rate Name	The tax rate's name as it will appear on the Tax Rate dropdown list
Percentage	The percentage of the quote's subtotal that will be taxed
Status	Choose whether this tax rate should show on the Tax Rate dropdown list
Order	Enter a number to specify the order in which this rate will appear in the Tax Rate dropdown list

Tax Rates Module Tab

The Tax Rates module tab can be accessed by clicking the Tax Rates option in the Admin menu. Click the tab to access the Tax Rates list view. You may also hover on the tab to display the Actions menu. The Actions menu allows you to perform important actions within the module.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Shipping Provider List	Opens the Shipping Provider list view
Tax Rate List	Opens the Task Rates list view
Import Tax Rates	Opens the import wizard to create or update tax rates using external data

Creating Tax Rates

Tax Rates can be created either via the Tax Rates module or by importing Tax Rates. When creating via the Tax Rates module, the full edit view layout opens below the Tax Rates list view and includes all of the fields for your tax rates.

Use the following steps to create a task rate via the Tax Rates module:

1. Navigate to Admin > Tax Rates.
2. Click on "Create" above the list view.

Tax Rates

Tax Rate List

The screenshot shows the 'Tax Rate List' interface. At the top, there is a 'Create' button highlighted with a red box. Below it is a search bar labeled 'Tax Rate Name' with a dropdown arrow. A single entry is visible: '8.25 - Cupertino, CA'.

3. Enter appropriate values for the [fields](#) in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
4. Once the necessary information is entered, click "Save". If you would like to create a new tax rate, click "Save & Create New".

Tax Rate:

The screenshot shows the 'Tax Rate' edit form. At the top, there are two buttons: 'Save' (highlighted with a red box) and 'Save & Create New'. Below the buttons are four fields:

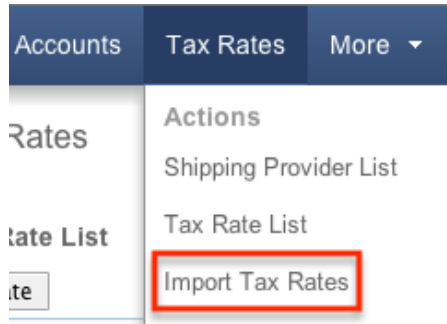
- Tax Rate Name:** * 6.25 - Boston, MA
- Percentage(%):** * 6.25
- Status:** * Active (dropdown menu) Set status to Inactive to remove this tax rate from the Tax Rate dropdown lists
- Order:** * 2 Set the order in which this tax rate will display in the Tax Rate dropdown lists

Importing Tax Rates

The import function allows you to push multiple tax rates into Sugar using a comma (or other character) delimited file instead of creating them one-by-one. For more information on importing, please refer to the [Import](#) documentation.

Use the following steps to import tax rates into Sugar via the Import Tax Rates option:

1. Hover on the Tax Rates module tab and select "Import Tax Rates".



2. In Step 1, select the import file and choose "Create new records only". Click "Next".
3. In Step 2, confirm the import file properties. Click "Next".
4. In Step 3, confirm the field mappings for the import. Click "Next".
5. In Step 5, view the import results.

- The Created Records tab will show all of the new tax rates.
- The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
- The Errors tab will show records that were not imported due to errors detected during import.

Tax Rates List View

The Tax Rates list view displays all tax rate records. You can view the basic details of each rate within the field columns. You can also click on a tax rate's name to [edit](#) it, or [delete](#) the rate by clicking the "Delete" button at the end of the row.

Column Sorting

List view provides the ability to sort all tax rates by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click

the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time.

Tax Rate Name ⇅	Status ⇅	Order ⇅
8.25 - Cupertino, CA	Active	1

Ordering Tax Rates

The Order field in Tax Rates defines the order of the different tax rates options when viewing the Tax Rate dropdown list of a quote. The Order field allows you to organize what order the dropdown list will display, with 1 being the highest on the list and moving down as the order number rises. When creating new Tax Rate record options, the Order field will automatically increment to the next number in the list, thereby adding the new option to the bottom of the list. The Order field can be overwritten with another number if you would like to manually re-order the options.

Editing Tax Rates

Tax Rates may be edited at any time to update or add information to the record. You can make changes to existing tax rates records via the Tax Rates edit view. Edit view is available within the Tax Rates module, below the list view, and includes all of the provider fields you should need.

8.25 - Cupertino, CA	Active	1	delete
⏪ ⏩ (1 - 1 of 1) ⏪ ⏩			

Tax Rate: 8.25 - Cupertino, CA


Tax Rate Name: *	<input type="text" value="8.25 - Cupertino, CA"/>
Percentage(%): *	<input type="text" value="8.25000"/>
Status: *	<input type="button" value="Active"/> Set status to Inactive to remove this tax rate from the Tax Rate dropdown lists
Order: *	<input type="text" value="1"/> Set the order in which this tax rate will display in the Tax Rate dropdown lists

Deleting Tax Rates

If a tax rate is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from the Tax Rates list view.

Use the following steps to delete a tax rate via the list view:

1. Navigate to a Tax Rates list view.
2. Locate the rate that you would like to delete.
3. Click "Delete" on the corresponding rate's row.

Tax Rate Name ⇅	Status ⇅	Order ⇅	
8.25 - Cupertino, CA	Active	1	 delete

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

Last Modified: 09/26/2015 06:25pm

Bug Tracker

Overview

In [Bug Tracker](#), there are two dropdown fields, "Found in Release" and "Fixed in Release", that cannot be edited through normal means. Although these are dropdown fields, they do not show a [dropdown list](#) option in Dropdown Editor to add, remove, and edit the dropdown options.

Display Label:
 System Label:
 Help Text:
 Comment Text:
Drop Down List:
 Default Value:

The release dropdown list is instead controlled by the Releases section of the Admin menu. The release list is more comprehensive than a standard dropdown list, so each list option needs additional information. This documentation will cover how to use the Releases section of the Admin menu and make changes to the list that controls these fields.

Release Fields

The Releases module contains three fields which come out-of-the-box with Sugar. These fields are not found in Studio, and therefore cannot be edited.

Field	Description
Release Version	The version name or number of this release.

Status	Select Active from this dropdown list to display the name in the Release dropdown list. Inactive records will only show in the list view of this page.
Order	Enter a number to specify the order in which the release is displayed in the dropdown list. Numbers can be repeated in this field, so they can either be ranked in order (1,2,3...), in order of importance (1,1,1,2,2,2,3,3,3...), or any other ranking that is used internally.

Release Module Tab

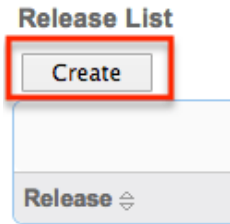
The Releases module tab only appears after clicking on the Releases link from the Admin menu. Click the tab at any point when using the menu to revert to the Releases list view. You may also hover on the tab to display the action of "Releases List" and the Recently Viewed menu. The [Recently Viewed](#) menu displays the list of releases you last viewed in the module.



Creating Releases

Releases can only be created from the Release section of the admin menu. Use the following steps to create a release option for dropdown lists:

1. Click on Admin > Releases.
2. Click on the "Create" button above the list view on the Releases screen.



3. An editable subpanel will open below the list view. Enter the required information on the fields provided.

Release:

Save Save & Create New

Release version: * 1.0

Status: * Active Set status to Inactive to remove this release from the Release dropdown lists

Order: * 1 Set the order this release will appear in the Release dropdown lists

4. Click one of your two save options. Both will store your new record and have it available for use through Sugar. However, the behavior after clicking is dependent on which button used:

- Save : After clicking "Save", the same release option that you created will remain editable for you to make additional changes if need be, after appearing on the list view above.
- Save & Create New : After clicking "Save & Create New", the release appears on the list view, the edit form's "Release Version" field is cleared out, and the "Order" field is increased by one.

Release:

Save Save & Create New

Release version: *

Status: * Active Set

Order: * 2 Set the

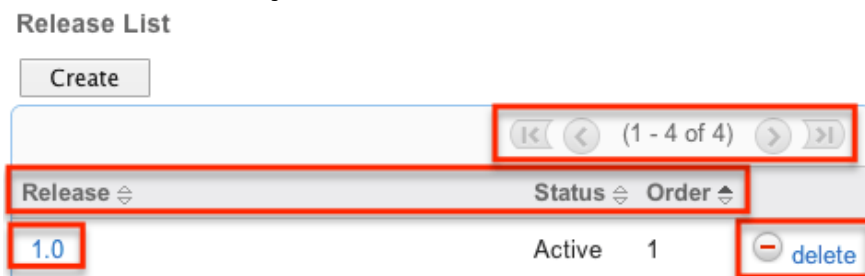
Viewing Releases

All of the release options are shown on a list view in the Releases module. Due to the Releases module only containing three fields, all of the necessary details are shown on this list view. The list view is always available when viewing the Releases module, and specific releases can be selected from the list, but records can also be selected via the Recently Viewed section of the module tab.

Viewing Via Module

To view all of the releases, navigate to Admin > Releases. The list view displays with all currently available releases within Sugar. The list view can be ordered by any of the three [fields](#) within Releases. To see additional releases, use the arrows in the top right of the list view to scroll through available pages. Here, you can see which records of the total amount of releases are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of the list.

From this list, any of the releases can be clicked and either [edited](#) or [deleted](#) .



View Via Recently Viewed

As you work on releases, Sugar will keep track of which releases you have recently viewed. Hover on the [Releases module tab](#) to see a list of your most recently viewed releases and click each name to open the release in the edit view below the list view.



Editing Releases

Changes to releases can be made at the discretion of any admin at any time. To make changes, such as changing the name of the release and how it shows in the Bug Tracker module, whether the release value is active or not, or the order in which the releases display, the release record needs to just be accessed via the list view. Follow these steps to edit releases:

1. Navigate to Admin > Releases.
2. Select the release that you would like to edit by clicking the release name.

Release	Status	Order	
1.0	Active	1	delete
2.0	Active	2	delete
2.5	Active	3	delete
3.0	Active	4	delete

3. This will open the editor below the list view for the specific record where you can make the necessary changes.

Save Save & Create New

Release version: * 1.0

Status: * Inactive Set status to Inactive to remove this release from the Release dropdown lists

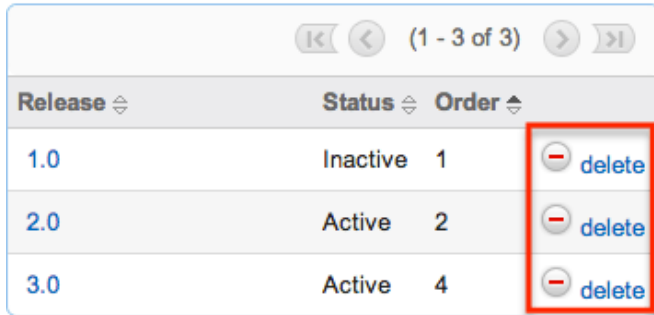
Order: * 1 Set the order this release will appear in the Release dropdown lists

4. Click one of your two save options. Both will store your updates to the record. However, the behavior after clicking is dependant on which button used:
 - Save : After clicking "Save", the same release option that you edited will remain editable for you to make additional changes if need be, after the changes update on the list view above.
 - Save & Create New : After clicking "Save & Create New", the changes to the release appear on the list view, the edit form defaults back to [creating a new record](#) .

Deleting Releases

If a release option is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from the Releases list view. Deleting release options will not delete the bugs that use them. Instead, if a bug's "Found in Release" or "Fixed in Release" field was filled in with the deleted release, the field will now be blank. Use the following steps to delete a release option from the Bug Tracker:

1. Navigate to Admin > Releases.
2. Click the Delete button corresponding to the release that you would like deleted.



Release	Status	Order	
1.0	Inactive	1	- delete
2.0	Active	2	- delete
3.0	Active	4	- delete

3. The page will refresh and the option will now be removed from the list view, as well as any references in the Bug Tracker.

Last Modified: 09/26/2015 06:25pm

Forecast Configuration

Overview

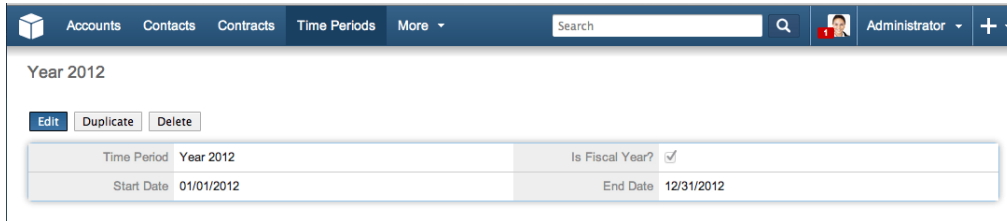
Your sales team has entered the sales opportunities into Sugar; the next step to getting the most out of your CRM system is to use the data from these opportunities to create a sales forecast. Forecasting the sales pipeline allows management to see and plan for future revenue, analyze trends, and understand where current and future business is likely to come from. As an administrator, you will need to configure the fiscal year, time periods, and forecast schedule to allow your users the ability to forecast their sales performance.

Setting the Fiscal Year

1. Log into Sugar as the administrator and navigate to the Admin page.
2. Scroll down to the Forecast section and select "Time Periods".



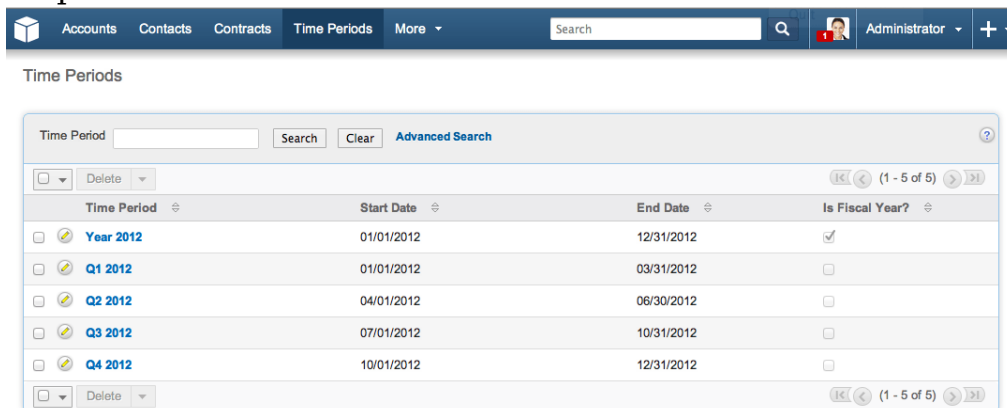
3. Create a new Time Period. Choose a name for the time period that denotes it as a fiscal year (such as "Year 2010"); check the "Is Fiscal Year?" checkbox. Select a start date and end date for the year, then click Save.



Note that some companies use a calendar year (January 1 to December 31) as the fiscal year, while others choose a different start and end date. Sugar gives you the flexibility to define your fiscal year however you'd like, to match your accounting rules.

Setting the Time Periods

1. In the Time Periods section of Admin, hover on the Time Periods tab and choose "Create Time Period".
2. Create a new Time Period. Choose a name for the time period, such as "Q1-2010" for the first quarter of 2010 if you do quarterly forecasting, or "Jan-2010" if you do monthly forecasting. Select the Fiscal Year from the dropdown list to which this time period belongs, and set the Start Date and End Date. Click the Save button to save your work.
3. Continue creating Time Periods for the rest of the fiscal year. You can use the "Duplicate" button to make this task easier.



When you are finished, you can check your work by hovering on the Time Periods tab and choosing "View Time Periods". You can use Advanced Search to search for the time periods for the fiscal year you created to make sure all are present.

Creating the Forecast Schedule

The last step the Administrator needs to perform is to create the Forecast Schedules. You can create an individual forecast schedule, or can create one for a

manager and have the manager's direct reports and indirect reports to participate in the forecast as well. You can create forecast schedules ahead of time, setting them to be "inactive" until the sales group is ready to use them. You can create forecast schedules for every time period you have set up, including Fiscal Year time periods (to create an annual forecast). In order for a user to see a forecast schedule, these items must be true:

1. It must be marked as "Active"
2. The "Forecast Start Date" for the forecast schedule must be Today or earlier
3. The schedule must be assigned to the user, or if it has the "Cascade" flag checked, the user must be in the reporting chain for the assigned user.

To set up a forecast schedule for a user, perform the following steps:

1. As the Admin user, navigate to the Admin page, then to the Forecast area, then to Time Periods.
2. Find the time period you'd like to create the forecast schedule for, then click the name to view it.
3. In the Forecast Schedule subpanel, click "Create".

Q1 2012

4. Fill in the information for Forecast Start Date, Status, and Schedule For. If you would like to create an individual forecast, do not check the "Cascade?" checkbox. Otherwise, check the checkbox to include all users who report to this manager, and their reports, etc. Save the record and return to view Time Periods.

Q1 2012

Last Modified: 11/18/2015 06:40am

Contract Types

Overview

The Contract Types module in Admin > Contract Types enables you to create and manage contract types for the Contracts module. When a contract type is created, it will display in the Type dropdown list in the Contracts module for users to select. Please note that only users with administrator or developer access have the ability to modify what contract types are available and the order in which they appear in the Type dropdown list. This documentation will cover how to use the Contract Types module to create and manage the contract types available for users to choose when creating contract records in Sugar.

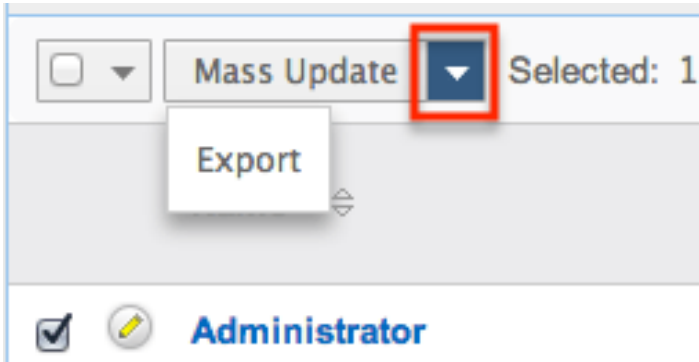
Contract Type Fields

The Contract Types module contains two stock fields which come out-of-the-box with Sugar. Please note that Contract Type fields are not editable via Admin > Studio as the module does not exist in Studio.

Field	Description
Name	The name of the contract type
List Order	A number to specify the order in which the contract type is displayed in the Type dropdown field in the Contracts module

Contract Types Module Tab

The Contract Types module tab appears on the navigation bar once you select "Contract Types" via Admin > Contract Types. Click the tab to access the Contract Types list view. You may also hover on the tab to display the Actions and Recently Viewed menu. The Actions menu allows you to perform important actions within the module. The [Recently Viewed menu](#) displays the list of contract types you last viewed in the module.



The Actions menu allows you to perform the following operations:

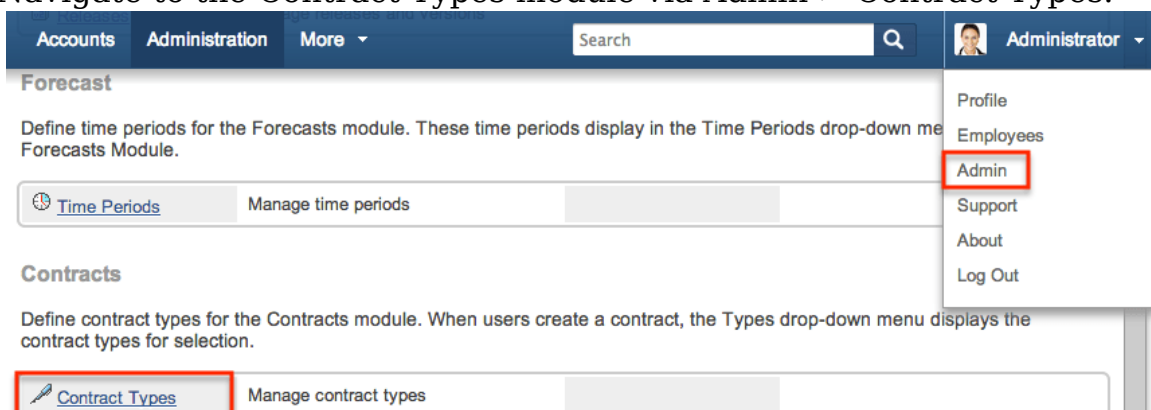
Menu Item	Description
Create Contract Type	Opens the edit view layout to create a new contract type
View Contract Types	Opens the list view layout to search and display contract types

Creating Contract Types

You can create contract types via the Create Contract Type option in the Contract Types module. This opens up the edit view layout which allows you to enter in all the relevant information for the contract type.

Use the following steps to create a contract type via the Contract Types module:

1. Navigate to the Contract Types module via Admin > Contract Types.

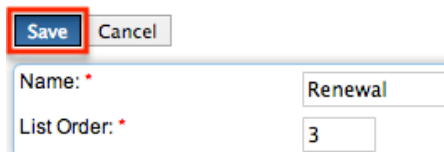


2. Hover on the Contract Types module and select "Create Contract Type".



-
3. Enter appropriate values for the [fields](#) in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
 4. Once the necessary information is entered, click "Save".

Create



Save Cancel

Name: * Renewal

List Order: * 3

Viewing Contract Types

There are various options available for viewing contract type records in Sugar including via Contract Types list view, Contract Types detail view, and Contract Types Recently Viewed menu.

Viewing Via List View

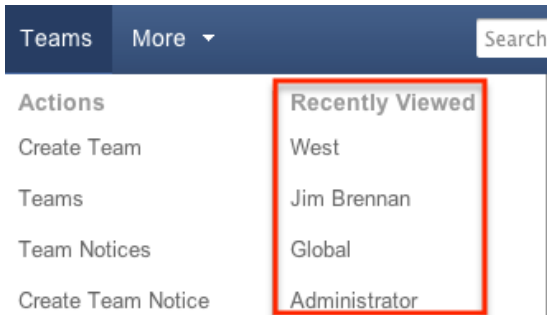
The Contract Types list view displays all contract type records meeting the current search criteria. To access the list view, simply click the [Contract Types module tab](#) . While list view shows key contract type fields, you can click the contract type's name to open the record in detail view to view any related module (e.g. Documents module) records as well. For more information on viewing contract types via list view, please refer to the [Contract Types List View](#) section of this documentation.

Viewing Via Detail View

The Contract Types detail view displays contract type information including all contract type fields followed by the Documents subpanel displaying the contract type's related documents. The detail view can be reached by clicking a contract type record's link from the Contract Types list view. For more information on viewing contract types via detail view, please refer to the [Contract Types Detail View](#) section of this documentation.

Viewing Via Recently Viewed

As you work in the Contract Types module, Sugar will keep track of which contract type records you have recently viewed. Hover on the [Contract Types module tab](#) to see a list of your most recently viewed contract type records and click each name to open the contract type in detail view.



Searching Contract Types

The Contract Types list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Contract Types list view below. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the [Search](#) documentation.

Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.

The buttons and checkboxes available in Basic Search panel have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.

Schedulers

A screenshot of a search form for schedulers. It features a text input field labeled "Job Name" on the left. To the right of the input field are two buttons: "Search" and "Clear".

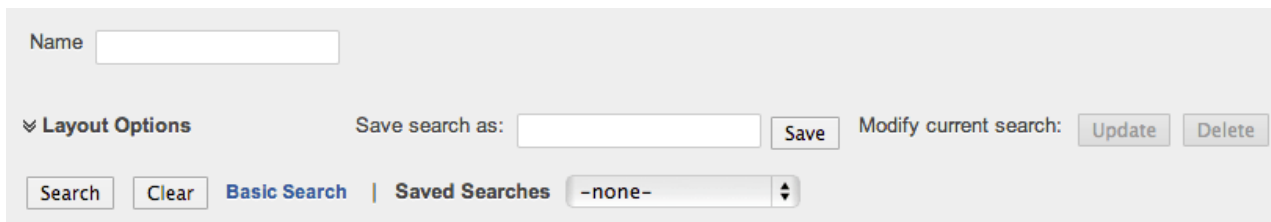
Enter in the appropriate keyword in the basic search Name field then click the Search button. Once the search is complete, the relevant results will populate in the [list view](#) below the search panel. To view all contract type records, simply click "Clear" and then "Search" to perform a blank search with no filters.

Advanced Search

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

The buttons and dropdowns available in Advanced Search have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the [Layout Options](#) section of the Search documentation.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the [Saved Search](#) section of the Search documentation.



The screenshot shows the Advanced Search interface. At the top, there is a text input field labeled "Name". Below it, there is a section titled "Layout Options" with a dropdown arrow. To the right of "Layout Options" is a "Save search as:" field with a "Save" button. Further right is a "Modify current search:" section with "Update" and "Delete" buttons. At the bottom, there are "Search" and "Clear" buttons, followed by a "Basic Search" link, a vertical separator, a "Saved Searches" label, and a dropdown menu currently showing "--none--".

Enter in the appropriate keyword in the advanced search Name field then click the Search button. Once the search completes, the relevant results will populate in the [list view](#) below the search panel. To view all contract type records, simply click "Clear" and then "Search" to perform a blank search with no filters.

Contract Types List View

The Contract Types list view displays all contract type records meeting the current search criteria. You can view the basic details of each contract type within the field columns.

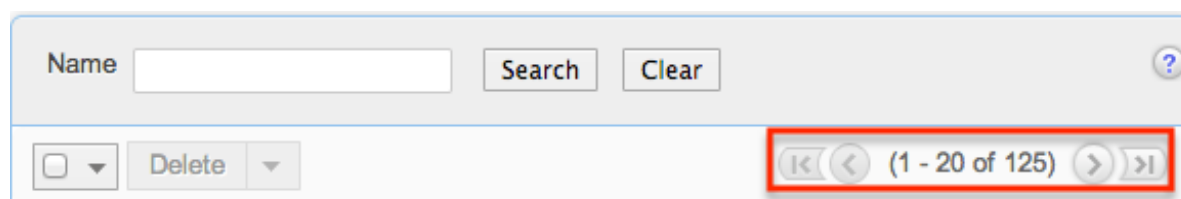
You have the option to change what fields are displayed in list view by configuring

your layout options in the Contract Types Advanced Search. For more information on configuring your list view, please refer to the [Layout Options](#) section of the Search documentation.

Pagination

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

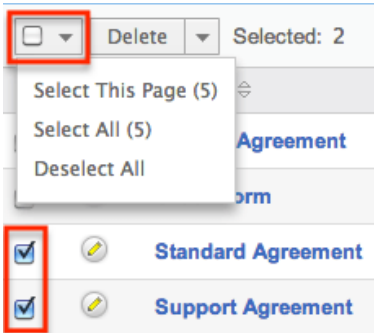
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.



Checkbox Selection

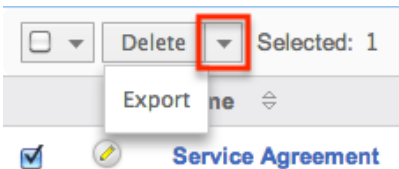
You can perform several actions on contract type records directly from the list view by first selecting the desired records. To select individual contract type records on the Contract Types list view, mark the checkbox on the left of each row. To select or deselect multiple contract type records on the list view, use the options in the checkbox dropdown menu:

- **Select This Page** : Selects all records shown on the current page of contract type results.
- **Select All** : Selects all records in the current search results across all pages of contract type results.
- **Deselect All** : Deselects all records that are currently selected.



Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.



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

Menu Item	Description
Delete	Delete one or more contract types at a time
Export	Export one or more contract types to a CSV file

Column Sorting

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



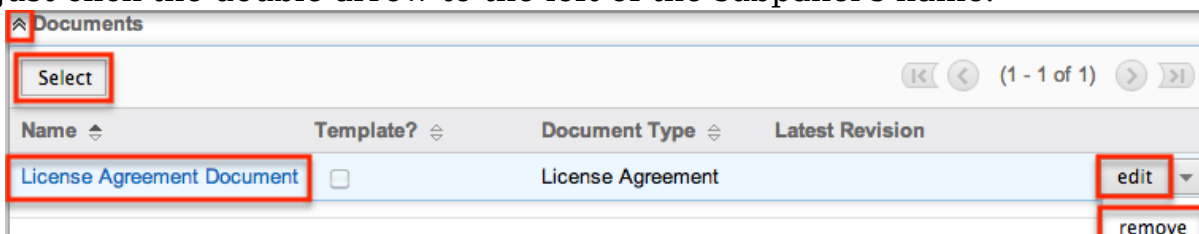
Contract Types Detail View

The Contract Types detail view displays information such as the contract's name and list order. You can also view related documents to the contract type record which appear in a subpanel beneath the contract type fields. The detail view can be reached by clicking the contract type record's link from the Contract Types list view.

Documents Subpanel

Beneath a contract type record's fields is the Documents subpanel containing related document records from the Documents module. Simply click the Select button and the documents pop-up window will open. You can search and select the desired document(s) in the pop-up window to relate to the current contract type record. The related document(s) will appear in the Documents subpanel of the contract type record. Please note that when a contract record is created with a specific contract type, the related documents to the contract type will appear in the Documents subpanel of the contract record as well.

To view the details of the related document record, click the record's name in the subpanel to open it in detail view. You can also delete the contract type's relationship to the document record by clicking "Remove" from the dropdown on the far right of the contract type record's row. To collapse or expand the subpanel, just click the double arrow to the left of the subpanel's name.



Editing Contract Types

Contract types may be edited at any time to update information on the record. You can make changes to existing contract type records via the quick create form in the Contract Types list view. Quick create forms appear as a pop-up window and generally contains fewer fields compared to the full edit view layout. But since the Contract Types module only consists of two fields, both layouts look the same. To access the full edit view layout, simply click the Full Form button in the quick create form.

Service Agreement


Name: * Service Agreement

List Order: * 1

Save Cancel Full Form

Editing Via List View

You can edit contract types via the [list view](#) by clicking the Pencil icon to the left of each contract type's name. A pop-up window will open with the quick create form which mirrors the Contract Types full edit view layout. Update the necessary fields, then click "Save" to preserve the changes.

Name	List Order
 Support Agreement	4

Ordering Contract Types

When creating contract types, you will define the order in which the contract type is displayed in the Type dropdown field in the Contracts module. The numeric value (e.g. 1, 2, 3, etc.) you enter in the List Order field determines the order each contract type will appear on the dropdown list. For example, a contract type with a list order of "1" will be displayed at the top of the dropdown list followed by the next value (e.g. 2), and so forth. Please note that you can change the list order by editing the contract type via the [list view](#) .

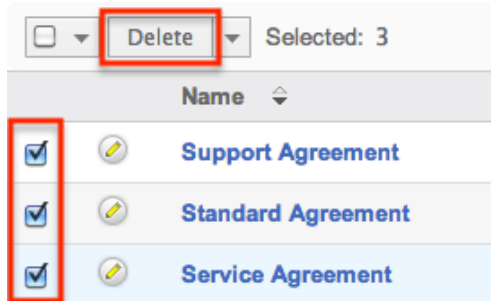
Deleting Contract Types

If a contract type record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from the Contract Types list view. Deleting via the list view allows you to mass delete multiple records at once. Please note that deleting contract type records will not delete the related records (e.g. documents) and will only remove the relationship.

Mass Deleting Via List View

Use the following steps to delete one or more contract type records via the list view:

1. Navigate to the Contract Types list view via Admin > Contract Types.
2. Use the [Basic](#) or [Advanced Search](#) to find the Contract Type records you wish to delete.
3. Select the desired contract type records individually or using the [checkbox dropdown](#)'s options.
4. Choose "Delete" from the Actions menu.



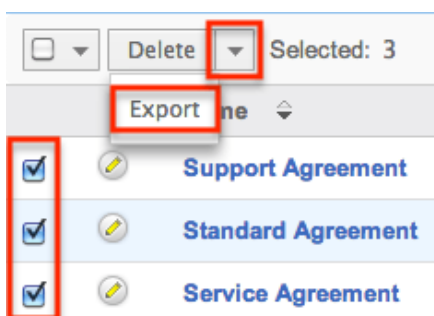
5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

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

Exporting Contract Types

Sugar's Export option allows users to download all fields for the selected contract types to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Contract data with other software such as Microsoft Excel. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of contract type records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Contract Types may be exported from the Contract Types list view by selecting "Export" from the Actions menu. Once the export is complete, a .CSV file will open up with all the Contract Type field values for the selected record(s).



Last Modified: 09/26/2015 06:25pm

Employee Records

Overview

Sugar's Employees module consists of individual people within your organization. The Employees module allows you to see a list of all employees, their contact information, and their employment status in one convenient location. Employee records are typically created when a user record is created, but users with administrative access can also add non-user employees. This means that, typically, all users will be listed as employees, but not all employees are necessarily Sugar users.

As the Employees module contains internal information about your company, not specifically Sugar, it is not subject to [team](#) and [role](#) restrictions.

Employee Fields

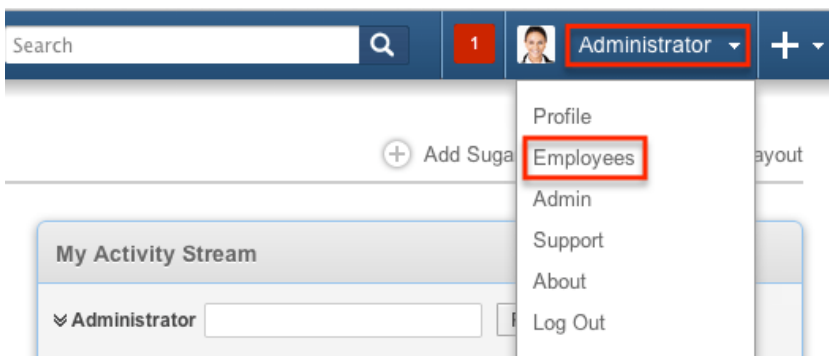
The Employees module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Fields can be altered, added, or removed via Admin > Studio. For more information on configuring fields, please refer to the [Studio](#) documentation in the Administration guide.

Field	Description
City	The city of the employee's address
Country	The country of the employee's address
Department	The department where this employee works
Email Address	The employee's email address
Employee Status	The employee's employment status in the organization, either: Active, Terminated, or Leave of Absence
Fax	The employee's fax number
First Name	The employee's first name
Home Phone	The employee's home phone number
IM Name	The employee's instant message screen name

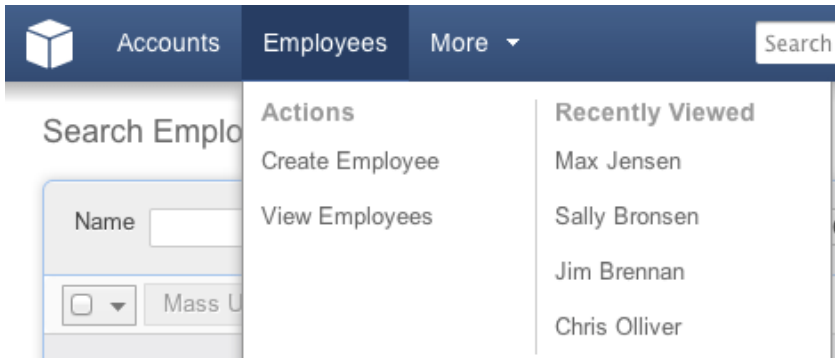
IM Type	The employee's instant message client type
Last Name	The employee's last name
Mobile	The employee's mobile phone number
Notes	A description or other information about this employee
Office Phone	The employee's office phone number and extension
Other	An additional phone number for the employee
Picture	A picture, headshot, or identifying image of the employee
Primary Address	The number and street of the employee's address
Postal Code	The postal code of the employee's address
Reports to	This field list's the employee's manager, if the manager is a Sugar user
State	The state of the employee's address
Title	The employee's job title

Employees Module Tab

The Employees module tab is located on the dropdown bar accessed by clicking your user name in the top right of any Sugar screen. Click the Employees option to access the Employees list view and have the Employees module tab appear.



Once displayed, you may hover on the tab to display the action for Actions and the Recently Viewed menu. The Actions menu allows you to perform important actions within the module. The [Recently Viewed menu](#) displays the list of employees you last viewed in the module.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Employee	Opens the edit view layout to create a new employee
View Employees	Opens the list view layout to search and display employees

Creating Employees

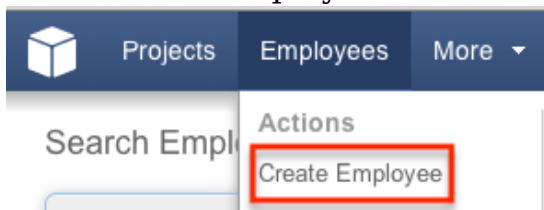
There are various methods for creating employees in Sugar including via the Employees module, the Users module, and duplication. The full edit view layout opens when creating the employee directly from the Employees menu and includes all of the relevant fields for your organization's employees. The edit view layout can be configured via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#) documentation.

Creating Via Employees Module

One of the most common methods of employee creation is via the Create Employee option in the Employees module tab. This opens up the edit view layout which allows you to enter in all the relevant information for the employee.

Use the following steps to create an employee via the Employees module:

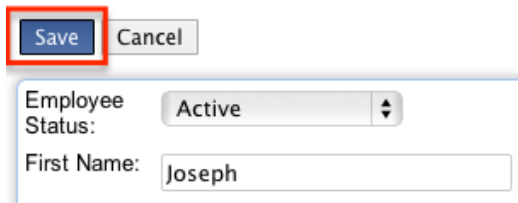
1. Hover on the Employees module and select "Create Employee".



2. Enter appropriate values for the fields in the edit view layout. All required

-
- fields are marked with a red asterisk and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".

Create



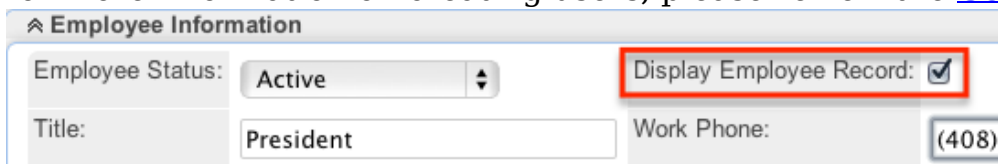
Save Cancel

Employee Status: Active

First Name: Joseph

Creating Via Users Module

When a user is created, an employee record is also created by default using the relevant fields from the user record to be populated on the employee record. The field in the Users module that controls this is the "Display Employee Record" field. For more information on creating users, please review the [Users](#) documentation.



Employee Information

Employee Status: Active

Display Employee Record:

Title: President

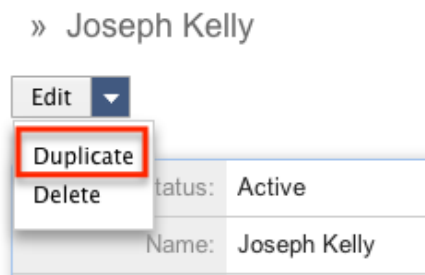
Work Phone: (408) ...

Creating Via Duplication

You can also create a new employee by duplicating an existing employee record. The duplicate option is useful if the employee you are creating has similar information to an existing employee.

Use the following steps to create an employee by duplicating an existing record:

1. Navigate to an employee record's detail view.
2. Select "Duplicate" from the Actions menu.



» Joseph Kelly

Edit

Duplicate

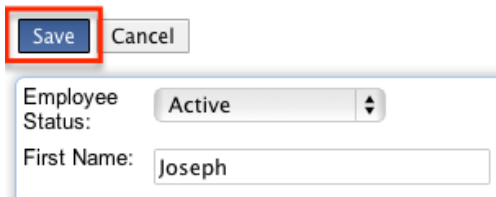
Delete

Status: Active

Name: Joseph Kelly

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

Create



Save Cancel

Employee Status: Active

First Name: Joseph

Viewing Employees

There are various options available for viewing employee records in Sugar including via Employees list view, Employees detail view, and the Employees Recently Viewed menu. Please note that you will only be able to access these views by first clicking on the Employees button after clicking on your user name in the top right side of Sugar.

Viewing Via List View

The Employees list view displays all employee records meeting the current search criteria. To access the list view, simply click the Employees option under your user name on the module tab bar. While list view shows key employee fields, you can click the employee's name to open the record in detail view. For more information on viewing employees via list view, please refer to the [Employees List View](#) section of this documentation.

Viewing Via Detail View

The Employees detail view displays thorough employee information by showing all employee fields. The detail view can be reached by clicking an employee record's link from the Employees list view. For more information on viewing employees via detail view, please refer to the [Employees Detail View](#) section of this documentation

Viewing Via Recently Viewed

As you work, Sugar will keep track of which employees you have recently viewed. Hover on the [Employees module tab](#) to see a list of your most recently viewed employees and click each name to open the employees in detail view.



Searching Employees

The Employees list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Employees list view below. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the [Search](#) documentation.

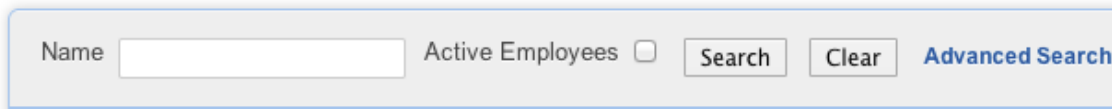
Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.

The buttons and checkboxes available in Basic Search panel have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- Active Employees : Select this box to return only records where Employee Status is Active.

Search Employees



Name Active Employees [Advanced Search](#)

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "Active Employees" and enter an employee's name, Sugar will only return employee records with a matching name that are active. Once the search is complete, the relevant results will populate in the [list view](#) below the search panel. To see all employee records, simply click "Clear" and then "Search" to perform a blank search with no filters.

Administrators can configure what fields appear on the Employees Basic Search via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide

Advanced Search

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

The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- Active Employees: Select this box to return only records where Employee Status is Active.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the [Layout Options](#) section of the Search documentation.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the [Saved Search](#) section of the Search documentation.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "Active Employees" and enter an employee's name, Sugar will only return employee records with a matching name that are active. Once the search is complete, the relevant results will populate in the [list view](#) below the search panel. To see all employee records, simply click "Clear" and then "Search" to perform a blank search with no filters.

Administrators can configure what fields appear on the Employees Basic Search via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Employees List View

The Employees list view displays all employee records meeting the current search criteria. You can view the basic details of each employee within the field columns.

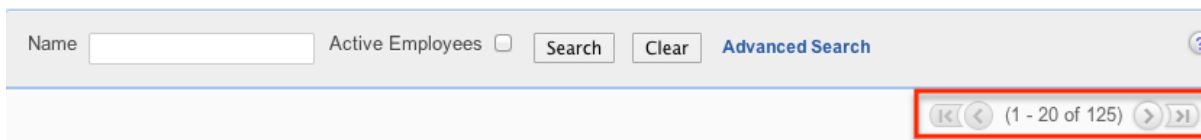
You have the option to change what fields are displayed in the list view by configuring your layout options in the [Employees Advanced Search](#) . For more information on configuring your list view, please refer to the [Layout Options](#) section of the Search documentation. Users with administrator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

Pagination

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

and Last Page buttons allow you to skip to the beginning or the end of your current results.

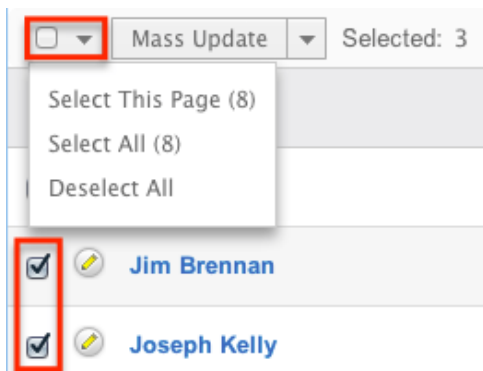
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.



Checkbox Selection

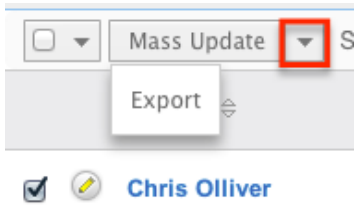
You can perform actions on employee records directly from the list view by first selecting the desired records. To select individual employee records on the Employees list view, mark the checkbox on the left of each row. To select or deselect multiple case records on the list view, use the options in the checkbox dropdown menu:

- **Select This Page** : Selects all records shown on the current page of case results.
- **Select All** : Selects all records in the current search results across all pages of case results.
- **Deselect All** : Deselects all records that are currently selected.



Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform actions on the currently selected records.



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

Menu Item	Description
Mass Update	Mass update one or more employees at a time
Export	Export one or more employees to a CSV file

Column Sorting

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

Employees Detail View

The Employees detail view displays thorough employee information by way of all employee fields grouped into one page.

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


Next or Previous Record

On the upper right of the Employees detail view, there are two buttons that allow you to page through each employee in the Employees list view's current search results. Clicking the Previous button displays the previous employee of the current search results while clicking the Next button displays the next employee of the

current search results. The text in between shows which employee result you are currently viewing within the total number of current results.

» Jim Brennan

(2 of 125)

Employee Status: Active	Picture: 
Name: Jim Brennan	

Editing Employees

Administrators may edit employees at any time to update or add information to the record. You can make changes to existing employee records via the Employees edit view and quick create forms. Edit view is available within the Employees module and includes all of the Employees fields you should need.

Joseph Kelly » Edit

Save Cancel Save and Continue (1)

Employee Status: Active	Picture: Choose File No file chosen
First Name: Joseph	Last Name: * Kelly
Title: President	Office Phone: (408)555-9876
Department: N/A	Mobile: (408)555-1234

Quick create is available for editing employees from the [Employees list view](#) and opens as a pop-up without navigating away from your current page. It generally contains fewer fields, but the Full Form button may be used to access the full edit view should you need to edit additional fields.

Joseph Kelly N/A President joseph@sugar.com (408)555-9876 A

Joseph Kelly

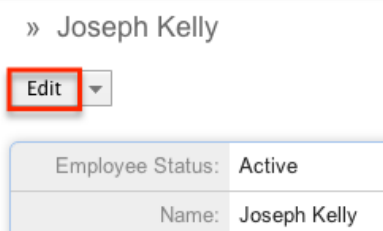
Employee Status: Active	Title: President
First Name: Joseph	Last Name: * Kelly
Department: N/A	Work Phone: (408)555-9876
Reports to: <input type="text"/>	Email Address: <input type="text" value="joseph@sugar.com"/>

Save Cancel Full Form

You may configure both the Employees edit view and quick create via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#) documentation in the Administration guide.

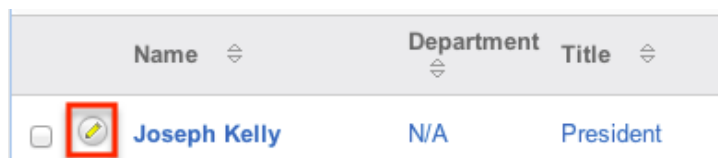
Editing Via Detail View

You can edit employees via the [detail view](#) by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve your changes.



Editing Via List View

You can edit employees via the [list view](#) by clicking the Pencil icon to the left of each employee's name. A pop-up window will open with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve your changes.



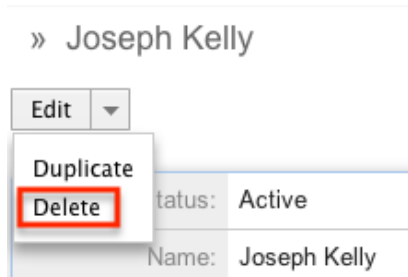
	Name	Department	Title
<input type="checkbox"/>	Joseph Kelly	N/A	President

Deleting Employees

If an employee record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from the Employee's detail view. Deleting employee records will also delete the User record that this employee was related to.

Use the following steps to delete an employee record via the detail view:

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

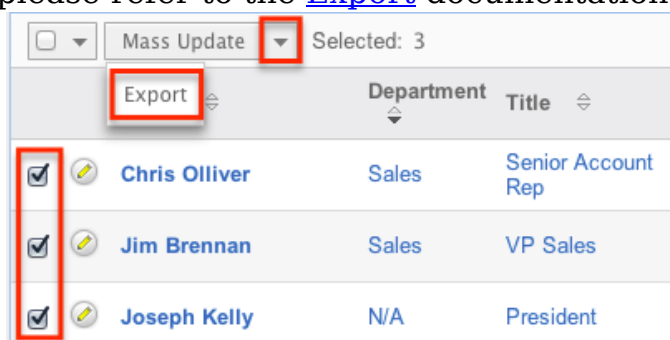


3. A pop-up message will display asking for confirmation and alerting you that the User record will also be deleted. Click "Ok" to proceed.

Exporting Employees

Sugar's Export option allows administrators to download all fields for the selected employees to their computers as a CSV (comma-separated values) file. This may be useful when needing to use Employee data with other software such as Microsoft Excel. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of employee records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Employees may be exported from the Employees list view by selecting "Export" from the Actions menu. For more information on exporting records in Sugar, please refer to the [Export](#) documentation.



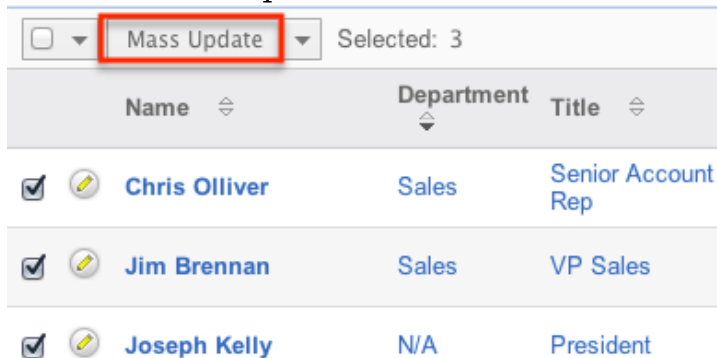
Mass Updating Employees

Mass Updating allows administrators to make the same change to multiple employee records at once from the Employees list view. Administrators can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the [Studio](#) documentation in the Administration guide. Due to the PHP memory limitations on the server, there may be occasions when the application times out while mass updating a large number

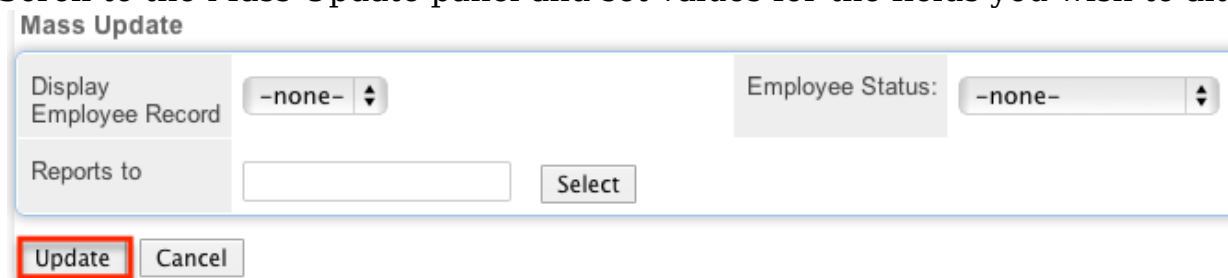
of employee records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Use the following steps to mass update employee records from the list view:

1. Navigate to the Employees list view by clicking the Employees module tab.
2. Use the list view's [Basic](#) or [Advanced Search](#) to find employees you wish to modify.
3. Select the desired employees individually or using the [checkbox dropdown's](#) options.
4. Choose "Mass Update" from the Actions menu.



5. Scroll to the Mass Update panel and set values for the fields you wish to alter.



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

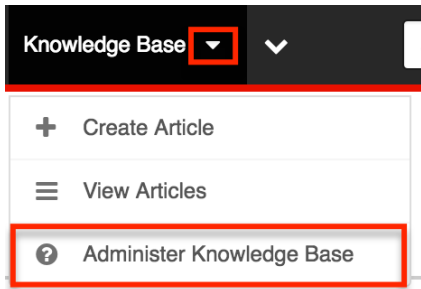
Last Modified: 09/26/2015 06:25pm

Knowledge Base Administration

Overview

Sugar's Knowledge Base module provides the ability to create, maintain, and publish articles. The Knowledge Base Administration module provides admin and developer users the ability to maintain articles and the available tags. You can access Knowledge Base Administration from the module tab of the Knowledge

Base module.



This documentation will cover how to use the Knowledge Base Administration module as well as the various actions and options available from within the module. For more information on creating and editing articles, please refer to the

Admin Actions Menu

The Actions menu in Knowledge Base Administration allows you to perform the following operations:

Menu Item	Description
Create New Tag	Add a new tag.
Delete Tag	Delete an existing tag. Must have no articles assigned to the tag.
Rename Tag	Rename an existing tag.
Move Selected Articles	Move one or more articles to a different tag.
Apply Tags To Articles	Apply one or more tags to one or more articles.
Delete Selected Articles	Delete an existing article.

Tag Tree

Tags are similar to folders and enable you to categorize articles according to specific criteria, such as a topic, to make locating articles easier. When you tag an article, the system creates a link between the tag and the article which resides in the Sugar database. An article can be linked with more than one tag. Similarly, a tag can be linked with multiple articles.

The tag tree can be seen on the left side of the page next to the list view.

Knowledge Base Admin

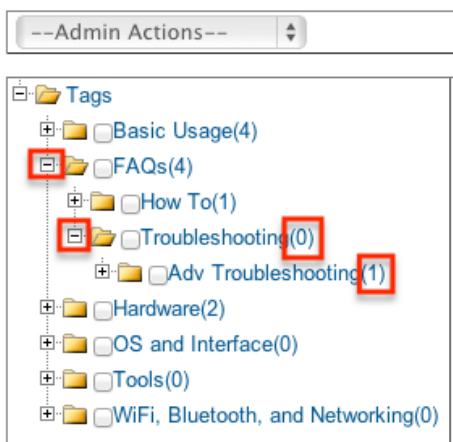


Tags in Sugar will display in the tree structure with the count of articles in that tag next to the tag name in parentheses. For example : Basic Usage tag has four articles with that tag.

Nested Folders

Tags can be parent tags or child tags. Parent tags are the top most category and child tags are nested within parent tags. Click the plus sign next to a tag name in order to expand out any children tags underneath it.

Knowledge Base Admin

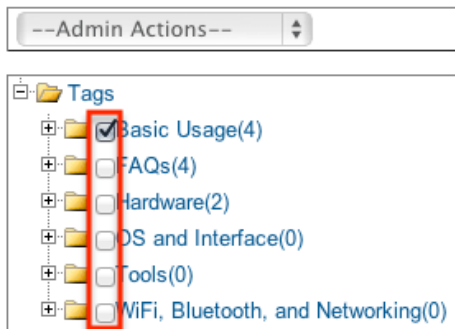


You can have multiple child tags for a parent and you can nest tags for many levels. The article count for each tag only includes articles explicitly assigned to the tag and does not include any articles assigned to child tags. Notice in the screen above, Adv Troubleshooting tag has one article assigned, but the direct parent of this tag, Troubleshooting, has zero.

Checkbox Selection

Each tag in the tag tree has a checkbox next to the tag name.

Knowledge Base Admin



The tag checkbox is used for the Delete Tag action only. For more information on how to delete tags, please refer to the [Deleting Tags](#) section in this documentation. Note : Selecting a checkbox for a tag does not select the articles in that tag. To select articles, please refer to the [Checkbox Selection](#) section under the Articles List View in this documentation.

Articles List View

The Knowledge Base Administration list view displays all articles for the selected tag from the tag tree. You can view the basic details of each article within the field columns.

Pagination

List view displays the current tag results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. To the right you can see which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of your current results. By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.

The screenshot shows the Articles List View interface. At the top right, there is a pagination control with buttons for First Page, Previous Page, (1 - 20 of 21), Next Page, and Last Page. Below the pagination control is a table with the following columns: Title, Frequency, Approver Name, Author, and Date Created. The table contains two rows of data.

<input type="checkbox"/>	Title	Frequency	Approver Name	Author	Date Created	
<input type="checkbox"/>	Resetting the device	23	admin	will	03/19/2013 04:34pm	
<input type="checkbox"/>	Troubleshooting Computer Problems	19	will	will	03/20/2013 09:46am	

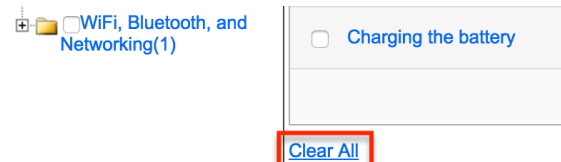
Checkbox Selection

You can perform several actions on articles directly from the list view by first selecting the desired records. To select individual articles on the Knowledge Base Administration list view, mark the checkbox on the left of each row.

- **Select This Page** : Selects all records shown on the current page of results.

<input checked="" type="checkbox"/>	Title	Frequency
<input checked="" type="checkbox"/>	Resetting the device	2
<input checked="" type="checkbox"/>	How to change the language	2

- **Clear All** : Deselects all records that are currently selected.





Column Sorting

List view provides the ability to sort all of the current results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time.

Frequency	Approver Name	Author
2	admin	will

Edit Button

You can edit articles via the list view by clicking the Pencil icon to the right of each row. The article will open directly to the edit view. Update the necessary fields, then click "Save" to preserve the changes.

Author	Date Created	
will	2016-04-18 07:15	
will	2016-04-18 07:15	

Creating New Tags

Knowledge Base Administration allows admin users to create new tags to categorize articles by. Use the following steps to create a new tag from Knowledge Base Administration:

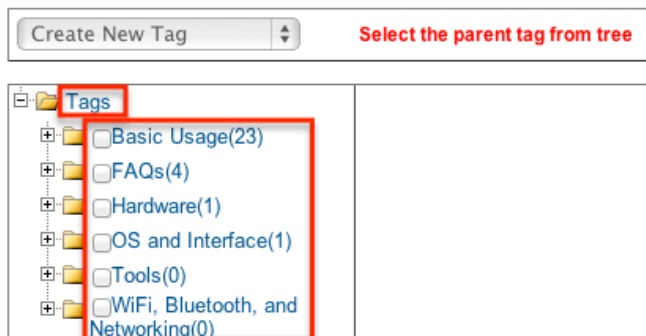
1. Select "Create New Tag" from the Admin Actions menu.

Knowledge Base Admin



2. Select the desired parent tag from the tag tree.

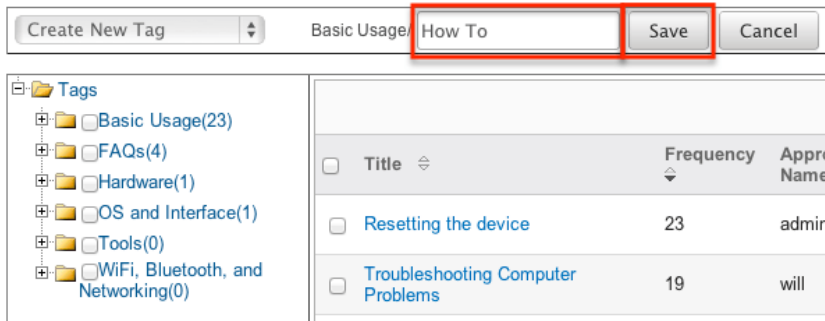
Knowledge Base Admin



If the new tag needs to be at the root level of the tag tree then select "Tags" at the top of the tree as the parent.

3. Enter in a new tag name and click "Save".

Knowledge Base Admin



4. The tag will then show as a child of the selected tag. The Create New Tag and parent tag remain selected. This allows you to continue to create new tags under the same tag without having to follow steps one and two again each time.

Deleting Tags

Knowledge Base Administration allows admin users to delete tags that are no longer being used. The tag being deleted must not have any articles on it and any child tags of the tag must also not have any articles, as they will be deleted as well. Users can empty a tag from the Knowledge Base module itself or admin users can utilize the [Move Selected Articles](#) action. Use the following steps to delete a tag from Knowledge Base Administration:

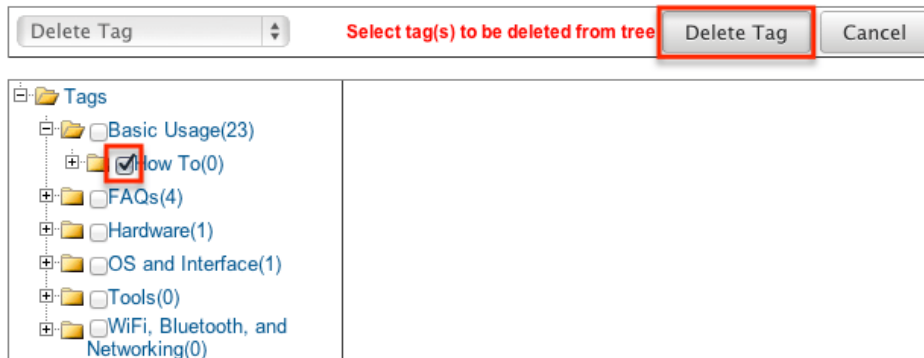
1. Select "Delete Tag" from the Admin Actions menu.

Knowledge Base Admin



2. Click the checkbox next to one or more tags to be deleted and click "Delete"

Knowledge Base Admin



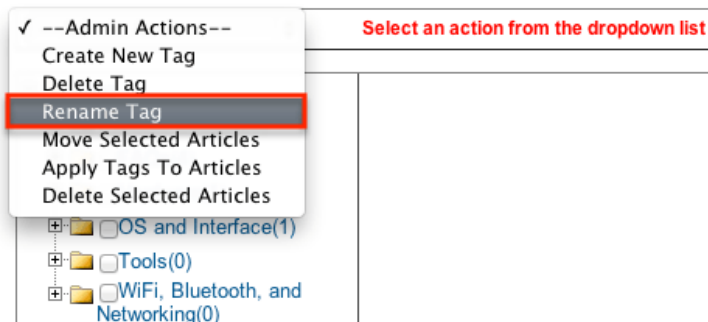
3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Renaming Tags

Knowledge Base Administration allows admin users to rename tags that are already being used. When you rename a tag any article in that tag will remain as well as any parent child relationship with other tags. Use the following steps to rename a tag from Knowledge Base Administration:

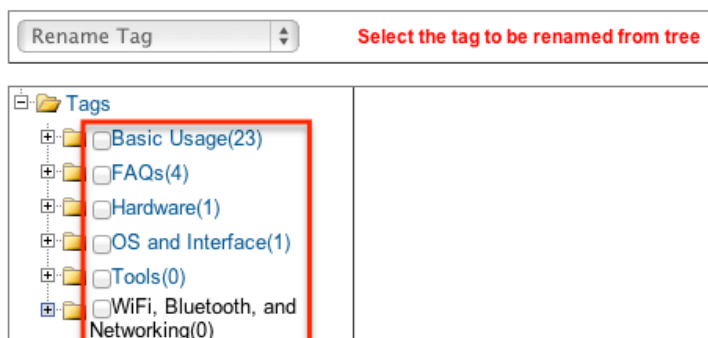
1. Select "Rename Tag" from the Admin Actions menu.

Knowledge Base Admin



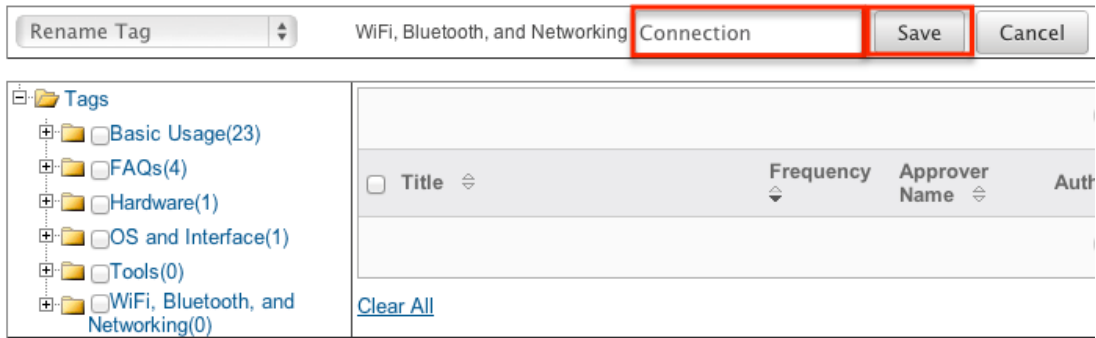
2. Select a tag name to be renamed.

Knowledge Base Admin



3. Enter in a new name for the tag and click "Save"

Knowledge Base Admin

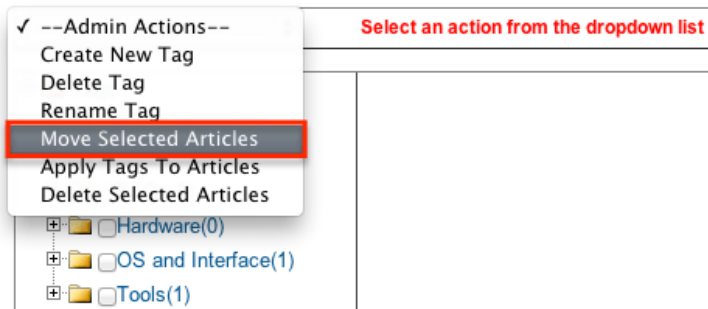


Moving Selected Articles

Knowledge Base Administration allows admin users to move one or more articles from one tag to another. Since articles can exist in many different tags, the move will only move an article from one tag, not all tags that article is on. Use the following steps to move articles from one tag to another in Knowledge Base Administration:

1. Select "Move Selected Articles" from the Admin Actions menu.

Knowledge Base Admin

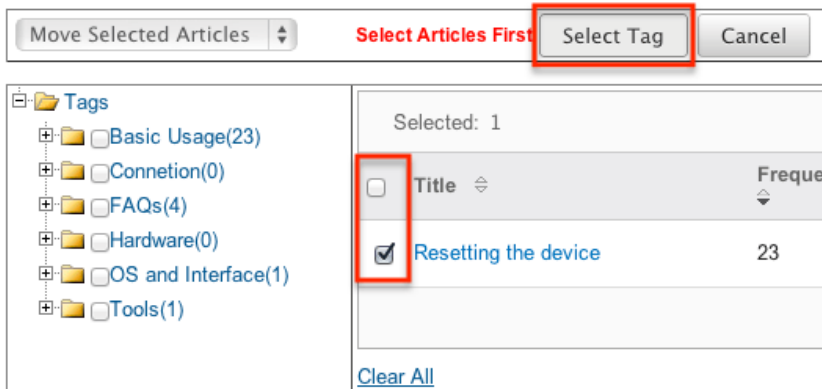


2. Select a tag in the tag tree to show the articles in that tag in the list view.

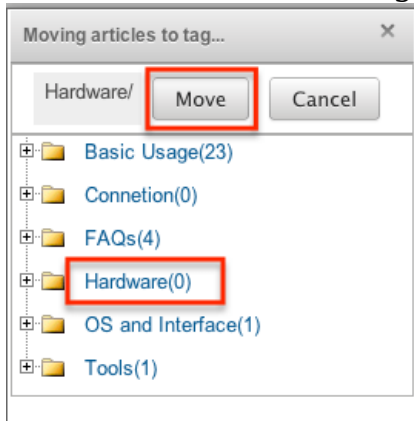
Knowledge Base Admin



3. Select the articles in that tag you would like to move and click "Select Tag".
Knowledge Base Admin



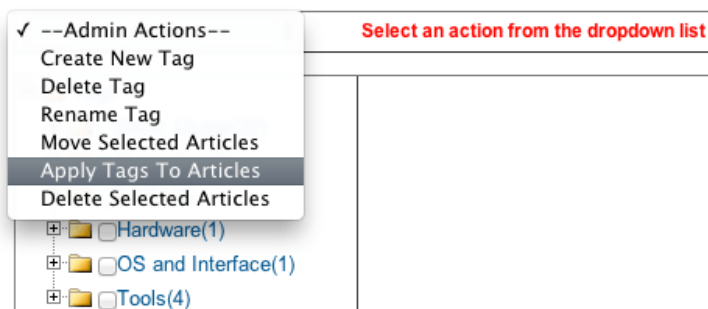
4. Select the destination tag for the articles selected and click "Move"



Applying Tags To Articles

Knowledge Base Administration allows admin users to apply one or more tags to one or more articles. This can be useful after creating a new tag. Instead of going through each article one by one adding tags, you can select the articles and apply the tag in fewer steps. Use the following steps to move articles from Knowledge Base Administration:

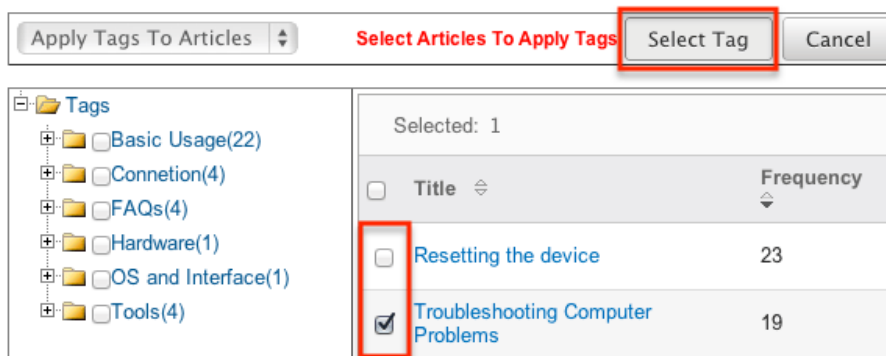
1. Select "Apply Tags to Articles" from the Admin Actions menu.
Knowledge Base Admin



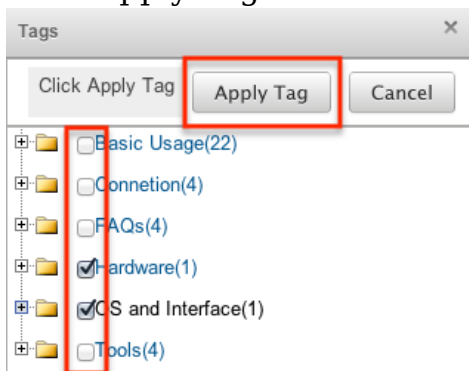
-
2. Select a tag in the tag tree to show the articles in that tag in the list view.
Knowledge Base Admin



3. Select the articles in that tag you would like to move and click "Select Tag".
Knowledge Base Admin



4. Select the checkboxes next to the tags to place on the articles selected and click "Apply Tag"



Deleting Selected Articles

Knowledge Base Administration allows admin users to delete one or more articles. Use the following steps to delete articles from Knowledge Base Administration:

1. Select "Delete Selected Articles" from the Admin Actions menu.

Knowledge Base Admin



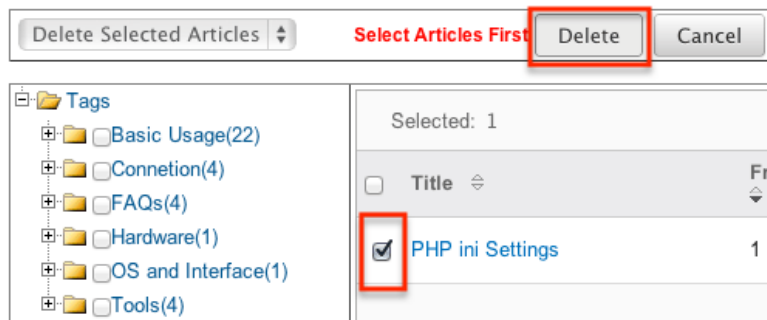
2. Select a tag in the tag tree to show the articles in that tag in the list view.

Knowledge Base Admin



3. Select the articles in that tag you would like to delete and click "Delete".

Knowledge Base Admin



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

Enabling Search on MSSQL

The Knowledge Base module in Sugar comes with a keyword searching ability that relies on the database having full-text searching enabled. Full text search is typically configured with MySQL and Oracle by default, but MSSQL requires some additional steps.

If using MSSQL 2005, 2008, or 2008R2 Express versions, please be sure to use the "Express with Advanced Services" version. The standard Express versions of MSSQL do not come with full-text searching at the database level.

Note : If you installed the standard SQL Express version, you can download the SQL Express with Advanced Services from Microsoft to install full-text Search. MSSQL Standard and Enterprise levels come with full-text searching in the product but is disabled by default during the install process. Run the following query on your Sugar database to determine if full-text searching is installed:

- `SELECT FULLTEXTSERVICEPROPERTY('IsFullTextInstalled')`

If the query above returns a "1", then full-text search is installed. If full text search is not enabled in your instance of MSSQL, but you are running Express with Advanced Services or higher versions, then you will have to modify your installation of MSSQL to include the "Full-Text Search" feature.

Note : For more information on installing or adding features to MSSQL, please refer to Microsoft's documentation.

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Advanced Configuration Options

Overview

Sugar comes with many different ways to configure your system to best meet your needs. Many configuration options are available throughout the application; though, some advanced options are not available through the interface, but can still be configured.

In the root directory of Sugar there are two configuration files: `config.php` and `config_override.php`. These files hold many configuration options within your instance of Sugar. The `config_override.php` file is available for you to add or modify Sugar's configuration. For more information on what options are available to change, please refer to the [Core Settings](#) section in the Developer guide.

Note: Instances running On-Demand do not have access to modify the `config_override.php` file.

System Configuration

Changing values in the config files can change functionality and behaviors in Sugar. We always recommend testing your changes on a development or test system before changing values in a production system. After changing the `config_override.php` file, you should perform a quick repair and rebuild from the

Admin > Repair menu. For more information on the quick repair and rebuild, please refer to the [Repair](#) documentation in the Administration guide.

Configuring File Permissions

Many features in Sugar require the webserver to have the proper file permission settings to be able to read and write files. At a minimum, the following files and directories need to be writable from your web server:

- ./config.php
- ./config_override.php
- ./sugarcrm.log
- ./cache/ and all subdirectories and files
- ./custom/ and all subdirectories and files
- ./data/ and all subdirectories and files
- ./modules/ and all subdirectories and files

Sugar running on Windows with IIS will need the IIS user (IUSR_[computerName]) to have access to these files.

Sugar running on Linux expects the listed files and directories to be owned by the same user running the web server and to also be in the same group. Sugar would then require the following permissions:

- 775 for the directories listed above
- 664 for the config.php file and all files in the directories listed above

When running on Linux, the config.php file in your Sugar instance's root directory contains a setting called `default_permissions`. This setting controls the ownership and accessibility to all files and folders created by Sugar. The following is an example of setting Read, Write, and Execute permissions for the Apache user and the Apache group on Centos operating system:

```
default_permissions' => array(  
    'dir_mode' => 1528,  
    'file_mode' => 432,  
    'user' => 'apache',  
    'group' => 'apache',  
) ,
```

The values for 'dir_mode' and 'file_mode' are decimal equivalent values for the standard octal values entered for permissions. The value 1528 is the decimal equivalent of the octal value 02770 and a value of 432 which is the decimal

equivalent of octal value 0660. These are the recommended directory and file permissions for Linux systems.

Note: If the octal values are entered, they will be interpreted as decimal and will not provide the expected file permission settings.

The 'user' and 'group' values determine the ownership of the files created. When empty, your Apache settings will take precedence to determine file and directory ownership. These values should be set explicitly to the Apache user and group on your server and these values will vary depending on the Apache setup and/or Linux OS you are running. To update these values, please edit the `config_override.php` file in the root directory of your installation and add the following lines:

```
$sugar_config['default_permissions']['user'] = '<your Apache user>';  
    $sugar_config['default_permissions']['group'] = '<your Apache  
group>';
```

Note: These values will take effect for only newly created files, not existing files. If you need to change the file permissions or ownership for existing files, you must execute the changes through the file system.

Allowing POP Email Accounts

Inbound email accounts are setup to work with IMAP protocols by default. If your email provider required POP3 access instead of IMAP, you can add the following line to the `config_override.php` file:

```
$sugar_config['allow_pop_inbound'] = true;
```

This will allow new inbound email accounts to be configured with POP3 or IMAP.

Note: POP3 access is not supported and can cause unintended consequences. IMAP is the recommended protocol to use for inbound email accounts.

Security Options

In Sugar, by default, all administrators have access to administrative tools like the Upgrade Wizard, Module Builder, Module Loader, and Backups. The following sections will show a few different ways to disable these options.

Locking Down Admin Control

If you are managing multiple instances of the Sugar application, you can maintain complete control over the Sugar instances by preventing users with administrative privileges from making any changes. To do this, you can lock down the Upgrade Wizard, Module Builder, and Backups with a single command in the `config_override.php` file:

```
$sugar_config['admin_access_control']=true;
```

Locking Down Module Loader

To ensure that users with administrative privileges do not load sub-standard modules into Sugar, you can restrict the Module Loader to a specific directory on the web server that you control. This allows you to check modules before they are loaded into Sugar. To restrict the module loader, simply add the following lines to the `config_override.php` file:

```
$sugar_config['use_common_ml_dir'] = true;
$sugar_config['common_ml_dir'] =
'/Applications/MAMP/htdocs/sugarcrm/screenedModules';
```

This will prevent any admin users from loading a module from any directory other than the specified directory. Once a module is approved through the necessary channels, the module can be placed in the specified directory for any admin to install when necessary.

New uploads for Module Loader are disabled. Installable modules are restricted to the modules pre-loaded below.

Name	Action
Bug_53944_656-661_PRO_CORP_ENT_ULI.zip	<input type="button" value="Upload"/>

Another method for locking down the module loader is to enable the package scanner. The package scanner is enabled by default for instances hosted On-Demand. If you are running Sugar on-site, you can enable the package scanner by adding the following command in the `config_override.php` file:

```
$sugar_config['moduleInstaller']['packageScan'] = true;
```

When the package scanner is enabled, the module loader will check the files being loaded for various functions that could be damaging to the server or instance of Sugar. For more information on which functions are blacklisted and how to configure the package scanner, please refer to the [Module Loader Restrictions](#) document in the Developer guide.

Locking Down Backups

To prevent admin users from running a backup of the Sugar files, you can add this

the following line to the `config_override.php` file:

```
$sugar_config['hide_admin_backup'] = true;
```

Enabling Sites as Referers

To prevent Cross Site Request Forgery (XSRF) attacks, Sugar has a list of acceptable sites that are allowed as a referer to Sugar. If you receive a "Possible Cross Site Request Forgery (XSRF) Attack Detected" message from an approved site trying to access Sugar, you can add that approved site's URL to the list of valid referers by adding the following line to the `config_override.php` file:

```
$sugar_config['http_referer']['list'][] = 'my.site.com';
```

This line will add the specified site to the list of approved sites. If you have multiple sites that need added, you may add this line for each site required.

Performance

If the performance of your Sugar instance begins to degrade, there are some configuration options you can enable to lighten the load on your system. The following options may cause Sugar's performance to increase, but some performance gains will come with a loss of functionality.

Recommended Server Settings

Sugar recommends a PHP memory limit of at least 512MB. This value may need to be increased depending on how your users utilize Sugar. For example, operations such as mass update and imports may require additional memory depending on your instance size and configuration. To change this limit, edit the setting within `php.ini`:

```
memory_limit = 512M
```

In addition, `display_errors` should always be set to "off". Enabling this option can result in adverse behavior for your users. To turn this setting off, edit the option within `php.ini`:

```
display_errors = off
```

When making changes to either of these settings or any other settings within `php.ini`, you must restart the web server before the settings will take effect.

Limiting System Resources

Sugar allows non-admin users to be restricted to how many queries they can run per action. By default the limit for all modules is set to 1000 queries. This prevents user-initiated processes from taking up too many system resources. If an operation is performed by a user that attempts too many queries they will see a message returned saying: "Error: Query limit of 1000 reached for Leads module.". To change this limit for all modules, add the following line to the `config_override.php` file:

```
$sugar_config['resource_management']['default_limit'] = 5000; //  
default is 1000
```

Note: Setting the `default_limit` value to 0 will remove the query limit altogether for all modules.

In addition to setting the default for all modules, you can specify certain modules to have a different value. To remove the limit for specific modules only you need to specify the modules and the limit for those modules by adding the following lines to the `config_override.php` file:

```
$sugar_config['resource_management']['special_query_modules'][] =  
'Leads';  
$sugar_config['resource_management']['special_query_modules'][] =  
'Contacts';  
$sugar_config['resource_management']['special_query_limit'] = 0; //  
default is 50000
```

In this example, the Leads and Contacts module will no longer be limited in addition to any other modules in the `special_query_modules` array, but all other modules will still adhere to the default limit.

Note: Setting this limit too low can severely restrict users from performing basic actions. Alternatively, removing the limits altogether may let users inadvertently perform operations that significantly impact overall performance.

Changing the Upload Directory

Sugar stores content, such as images, documents, and installable modules, uploaded by users in the upload directory. Some of these documents may be large in size and can cause performance issues. Administrators can move the upload directory to a different location to ensure that enough space is available for uploads without affecting the system. You can change the location of the uploads to a different folder within the sugar directory or use an absolute path to place the

folder anywhere in the file system. You can change this location by adding the following line to the `config_override.php` file:

```
$sugar_config['upload_dir'] = 'd:\upload\';
```

Note: Remember to copy files from the old upload directory into the new upload directory for accessibility. The upload directory should be writable by the user running the webserver.

Changing the Cache Directory

Sugar uses a cache directory to store files (such as compiled templates, aggregated variable definitions, remote mailbox data, various cache files) produced by the system to optimize functionality and enhance system performance. These files can take considerable space, especially in larger systems. You can change the location of the cache to a different folder within the sugar directory or use an absolute path to place the folder anywhere in the file system. You can change this location by adding the following line to the `config_override.php` file:

```
$sugar_config['cache_dir'] = 'd:\cache\';
```

Some of the cache files can be accessed by direct URLs. So if you move the cache directory, you should also ensure that the URL `/cache/` (relative to the main Sugar site URL) on your webserver is configured to refer to the new cache location. For more information on how to configure mappings between URLs and file system directories, refer to your webserver documentation.

Note: The cache directory needs to be created first, or you may receive an Internal Server error. The cache directory should be writable by the user running the webserver.

Configuring Count Queries

By default, list views and subpanels in Sugar return record counts. This can be convenient to know how many records were found for a specific search, but in order to retrieve the record count; Sugar needs to perform additional queries on the database. When there are large amounts of data, these queries can cause performance issues. You can disable these count queries in Sugar by adding the following line to the `config_override.php` file:

```
$sugar_config['disable_count_query'] = true;
```

Instead of seeing the total record count, you will see the current known record

count with a plus sign next to it.

Disabling Related Calculation Fields

When a calculated field in Sugar uses the related function in the Sugar Logic, this will cause the calculated field to be executed when the related module is updated. This can cause a cascading effect through the system to update related calculated fields. When this happens you may receive a 502 Gateway Error. You can disable the related calculation field updates by adding the following line to the `config_override.php` file:

```
$sugar_config['disable_related_calc_fields'] = true;
```

Note: This is a global setting that will affect all modules. If you have a calculated field in Accounts that sums up all Opportunities for the account, setting this value to true will no longer update the opportunity account sum in Accounts until the account record itself is modified. However, if this setting is left disabled, the sum would update any time a related opportunity or the account is modified.

Disabling Automatic Searches

By default, list views in Sugar remember the last search performed by the current user in each module. While this can be convenient, it is sometimes unnecessary. If the last search performed in a module was an extensive search, the next time the user navigates to that module will inadvertently perform the search again. This can have a negative impact on performance in Sugar.

Set the following values in the `$sugar_config['save_query']` value in the `config_override.php` file to configure different options for saving list view queries:

Value	Description
all	Populates the last search and executes it Note: This is the default behavior in Sugar.
no	Discards the previous search and executes a search with no criteria
populate_only	Populates the last search, but does not execute it

For example:

```
$sugar_config['save_query'] = 'populate_only';
```

Using a Custom Page For Campaign Trackers

When sending campaigns through Sugar, tracker URLs are used for images, links, and the opt-out link in the campaign. When the recipient of the campaign clicks one of these links they are by default taken to the Sugar instance that sent the campaign. Many organizations may want to use a custom page to send recipients to instead of using Sugar, or when running Sugar onsite it may be behind a firewall and not accessible to the recipients of the campaign. Use the following steps to create a custom landing page to use for tracker URLs while still properly recording the activity in Sugar.

1. Create an index.php page on the desired web server that is open to the Internet.
2. Add the following code to the custom index.php page to ensure all campaign activities are properly recorded in Sugar.

```
<?php
    if ($_REQUEST['entryPoint'] == 'removeme' ||
$_REQUEST['entryPoint'] == 'campaign_trackerv2' ||
$_REQUEST['entryPoint'] == 'image') {
        if (strlen($_REQUEST['identifier']) == 36) {
            $ch = curl_init();
            if (strlen($_REQUEST['track']) > 0) {
                curl_setopt($ch, CURLOPT_URL,
"http://sugar_url/index.php?entryPoint=" . $_REQUEST['entryPoint'] .
"&identifier=" . $_REQUEST['identifier'] . "&track=" .
$_REQUEST['track']);
                curl_setopt($ch, CURLOPT_HEADER, 1);
                curl_setopt($ch, CURLOPT_SSL_VERIFYPEER, 0);
                curl_setopt($ch, CURLOPT_FOLLOWLOCATION, 0);
                curl_setopt($ch, CURLOPT_RETURNTRANSFER, 1);
                curl_setopt($ch, CURLOPT_USERAGENT,
$_SERVER['HTTP_USER_AGENT']);
                $headers = curl_exec($ch);
                $headerArray = explode("\n", $headers);
                foreach ($headerArray as $value) {
                    if (substr(strtolower($value), 0, 8) == "location")
{
                        header($value);
                    }
                }
            } else {
                curl_setopt($ch, CURLOPT_URL,
```

```
"http://sugar_url/index.php?entryPoint=" . $_REQUEST['entryPoint'] .
"&identifier=" . $_REQUEST['identifier'];
    curl_setopt($ch, CURLOPT_HEADER, 0);
    curl_setopt($ch, CURLOPT_SSL_VERIFYPEER, 0);
    curl_setopt($ch, CURLOPT_FOLLOWLOCATION, 1);
    curl_setopt($ch, CURLOPT_USERAGENT,
$_SERVER['HTTP_USER_AGENT']);
    curl_exec($ch);
}
curl_close($ch);
unset($ch);
}
?>
```

Note: Replace all instances of "http://sugar_url" in the code above with the actual Site URL of your Sugar instance.

3. Finally, specify the external server URL in the Admin > Campaign Email Settings > Location of campaign tracking files option in order for the tracking links to be correctly generated in the campaign emails. For more information on setting this value, please refer to the [Campaign Email Settings](#) section of the Email documentation in the Administration guide.

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