
Sugar Ultimate 7.6 Administration Guide

| | |
|---|----|
| Sugar Ultimate 7.6 Administration Guide | 24 |
| Introduction | 24 |
| Overview | 24 |
| Core Admin Features | 24 |
| Admin Wizard | 25 |
| Overview | 25 |
| Login Screen | 25 |
| Language | 25 |
| Your Information | 26 |
| Your Locale | 27 |
| Team Management | 29 |
| Overview | 29 |
| Teams Module Tab | 29 |
| Team Types | 31 |
| The Global Team | 31 |
| Standard Teams | 31 |
| Private Teams | 32 |
| Team Membership Types | 32 |
| Creating Teams | 33 |
| Creating Via Teams Module | 33 |
| Creating Via Duplication | 34 |
| Adding Users to Teams Via Teams Module | 35 |
| Adding Users to Teams Via Users Module | 36 |
| Viewing Teams | 37 |
| Viewing Via List View | 37 |
| Viewing Via Detail View | 37 |
| Viewing Via Recently Viewed | 38 |
| Viewing Via Dashlets | 38 |
| Viewing Via Reports | 38 |
| Searching Teams | 39 |
| Teams List View | 40 |
| Pagination | 40 |
| Checkbox Selection | 40 |
| Actions Menu | 41 |
| Column Sorting | 41 |
| Teams Detail View | 42 |
| Actions Menu | 42 |
| Users Subpanel | 42 |
| Next or Previous Record | 43 |
| Editing Teams | 44 |
| Editing Via Detail View | 44 |
| Editing Via List View | 44 |
| Editing Via Users Module | 45 |
| Deleting Teams | 45 |
| Deleting Via Detail View | 46 |
| Deleting Via List View | 46 |

| | |
|--|----|
| Removing Users From Teams | 47 |
| Repairing Teams | 48 |
| Role Management | 48 |
| Overview | 48 |
| Roles Module Tab | 49 |
| Creating Roles | 50 |
| Creating Roles Via Role Management | 50 |
| Creating Roles Via Duplication | 50 |
| Setting Module-Level Permissions | 51 |
| Setting Field-Level Permissions | 55 |
| Assigning Users to Roles | 56 |
| Assigning Via Role Management | 57 |
| Assigning Via User Management | 58 |
| Viewing Roles | 59 |
| Viewing Via List View | 59 |
| Viewing Via Detail View | 59 |
| Viewing Via Recently Viewed | 59 |
| Viewing Roles by User | 60 |
| Viewing Via Users Module | 60 |
| Searching Roles | 62 |
| Roles List View | 62 |
| Pagination | 63 |
| Checkbox Selection | 63 |
| Column Sorting | 64 |
| Roles Detail View | 64 |
| Actions Menu | 64 |
| Module-Level Permissions | 65 |
| Field-Level Permissions | 65 |
| Users Subpanel | 66 |
| Editing Roles | 67 |
| Editing Via Detail View | 67 |
| Editing Via List View | 67 |
| Editing Via Users Module | 68 |
| Deleting Roles | 68 |
| Deleting Via Detail View | 68 |
| Mass Deleting Via List View | 69 |
| Password Management | 69 |
| Overview | 69 |
| Password Requirements | 70 |
| Advanced Options | 70 |
| System-Generated Passwords | 71 |
| User Reset Password | 72 |
| CAPTCHA Validation | 72 |
| Honeypot Validations | 73 |
| Email Templates | 73 |
| User-Generated Password Expiration | 74 |

| | |
|-----------------------------|-----|
| Login Lockout | 74 |
| External Authentication | 75 |
| LDAP | 76 |
| SAML | 79 |
| Setting User Passwords | 80 |
| User Management | 80 |
| Overview | 80 |
| User Types | 80 |
| Regular User | 80 |
| System Administrator | 81 |
| Group User | 81 |
| Portal API User | 82 |
| User Fields | 82 |
| Users Module Tab | 87 |
| Creating Users | 88 |
| Creating Via Module Tab | 88 |
| Regular and Admin Users | 89 |
| Group Users | 91 |
| Portal API Users | 92 |
| Creating Via Duplication | 93 |
| Creating Via Import | 94 |
| Viewing Users | 95 |
| Viewing Via Recently Viewed | 95 |
| Viewing Via List View | 95 |
| Viewing Via Detail View | 96 |
| Viewing Via Dashlets | 96 |
| Viewing Via Reports | 96 |
| Searching Users | 97 |
| Basic Search | 97 |
| Advanced Search | 98 |
| Users List View | 99 |
| Checkbox Selection | 99 |
| Actions Menu | 99 |
| Pagination | 100 |
| Column Sorting | 100 |
| Users Detail View | 101 |
| Actions Menu | 101 |
| Tabs | 102 |
| User Profile | 102 |
| Advanced | 102 |
| Access | 102 |
| Subpanels | 103 |
| Editing Users | 104 |
| Editing Via Detail View | 104 |
| External Accounts | 104 |
| Editing Via List View | 106 |

| | |
|--|------------|
| Deleting Users | 106 |
| Exporting Users | 107 |
| Mass Updating Users | 107 |
| Resetting User Preferences | 108 |
| Resetting User Passwords | 109 |
| Reassigning Records | 111 |
| Sugar Connect | 113 |
| Overview | 113 |
| License Management | 114 |
| Download Key | 114 |
| Editing the License Key | 115 |
| License Validation | 116 |
| License Expiration | 116 |
| Re-validating the License | 116 |
| Manual Validation | 117 |
| Sugar Updates | 118 |
| Online Documentation | 119 |
| System | 121 |
| Overview | 121 |
| System Settings | 122 |
| User Interface | 123 |
| Proxy Settings | 124 |
| Customer Self-Service Portal | 125 |
| SkypeOut | 125 |
| Tweet to Case | 125 |
| Advanced | 126 |
| Logger Settings | 127 |
| View Log | 128 |
| Locale | 129 |
| User Interface | 129 |
| System Currency | 130 |
| Export Settings | 130 |
| Database Collation | 131 |
| Currencies | 131 |
| Updating Conversion Rates | 132 |
| Languages | 133 |
| Search | 133 |
| Enabling Modules for Global Search | 134 |
| Activating Full-Text Search | 134 |
| Indexing Full-Text Search | 135 |
| Connectors | 137 |
| Setting Connector Properties | 137 |
| Enabling Connectors | 139 |
| Mapping Connector Fields | 140 |
| Managing Connector Search | 141 |
| OAuth Keys | 142 |

| | |
|------------------------------------|-----|
| OAuth Keys Fields | 142 |
| OAuth Keys Module Tab | 143 |
| Creating OAuth Keys | 143 |
| Creating Via OAuth Keys Module | 143 |
| Creating Via Duplication | 144 |
| Viewing OAuth Keys | 145 |
| Viewing Via List View | 145 |
| Viewing Via Detail View | 145 |
| Viewing Via Recently Viewed | 145 |
| Searching OAuth Keys | 147 |
| Basic Search | 147 |
| Advanced Search | 148 |
| OAuth Keys List View | 148 |
| Pagination | 149 |
| Checkbox Selection | 149 |
| Actions Menu | 150 |
| Column Sorting | 150 |
| OAuth Keys Detail View | 151 |
| Actions Menu | 151 |
| Next or Previous Record | 151 |
| Tokens | 152 |
| Editing OAuth Keys | 152 |
| Editing Via Detail View | 153 |
| Editing Via List View | 153 |
| Deleting OAuth Keys | 154 |
| Deleting Via Detail View | 154 |
| Mass Deleting Via List View | 154 |
| Exporting OAuth Keys | 155 |
| Mass Updating OAuth Keys | 155 |
| Import Wizard | 156 |
| Upgrade Wizard | 156 |
| Backups | 156 |
| Repair | 157 |
| Diagnostic Tool | 158 |
| Tracker | 160 |
| Scheduler | 162 |
| PDF Manager | 162 |
| Mobile | 162 |
| Configuring SugarCRM Mobile | 162 |
| Configuring Mobile Browser Access | 163 |
| Enabling Modules for Mobile Access | 163 |
| Enabling Offline Mobile Access | 164 |
| Repair | 164 |
| Overview | 164 |
| Quick Repair and Rebuild | 165 |
| Upgrade Teams | 166 |

| | |
|---|------------|
| Expand Column Width | 167 |
| Rebuild .htaccess File | 167 |
| Rebuild Config File | 167 |
| Rebuild Sugar Logic Functions | 168 |
| Rebuild Relationships | 168 |
| Rebuild Schedulers | 168 |
| Rebuild Sugar Dashlets | 170 |
| Rebuild WorkFlow | 170 |
| Rebuild Javascript Languages | 170 |
| Rebuild JS Compressed Files | 170 |
| Rebuild Sidecar Files | 171 |
| Rebuild JS Grouping Files | 171 |
| Rebuild Minified JS Files | 171 |
| Rebuild Sprites | 172 |
| Repair JS Files | 172 |
| Repair Non-Lowercase Fields | 172 |
| Repair Teams | 172 |
| Repair Roles | 173 |
| Repair Inbound Email Accounts | 174 |
| Remove XSS | 174 |
| Repair Activities | 174 |
| Enable/Disable Seed Users | 175 |
| Clear Additional Cache | 175 |
| Schedulers | 175 |
| Overview | 175 |
| Schedulers Fields | 175 |
| Default Schedulers | 176 |
| Check Inbound Mailboxes | 178 |
| Clean Jobs Queue | 178 |
| Create Future TimePeriods | 179 |
| Process Author Scheduled Job | 179 |
| Process Workflow Tasks | 179 |
| Prune Database on 1st of Month | 180 |
| Prune Old Record Lists | 180 |
| Prune Tracker Tables | 180 |
| Remove Diagnostic Tool Files | 181 |
| Remove Temporary Files | 181 |
| Remove Temporary PDF Files | 181 |
| Run Email Reminder Notifications | 182 |
| Run Nightly Mass Email Campaigns | 182 |
| Run Nightly Process Bounced Campaign Emails | 182 |
| Run Report Generation Scheduled Tasks | 183 |
| Sugar Heartbeat | 183 |
| Update tracker_sessions Table | 183 |
| Schedulers Module Tab | 183 |
| Creating Schedulers | 184 |

| | |
|---------------------------------|-----|
| Creating via Schedulers Module | 184 |
| Creating via Duplication | 185 |
| Viewing Schedulers | 186 |
| Viewing via List View | 186 |
| Viewing via Detail View | 186 |
| Viewing via Recently Viewed | 186 |
| Searching Schedulers | 188 |
| Schedulers List View | 189 |
| Pagination | 189 |
| Checkbox Selection | 189 |
| Actions Menu | 190 |
| Favorite Designation | 190 |
| Column Sorting | 191 |
| Schedulers Detail View | 191 |
| Actions Menu | 191 |
| Favorite Designation | 192 |
| Next or Previous Record | 192 |
| Job Log | 192 |
| Editing Schedulers | 193 |
| Editing via Detail View | 194 |
| Editing via List View | 194 |
| Deleting Schedulers | 195 |
| Deleting via Detail View | 195 |
| Mass Deleting via List View | 195 |
| Exporting Schedulers | 196 |
| Mass Updating Schedulers | 196 |
| Favoriting Schedulers | 197 |
| Favoriting via List View | 197 |
| Favoriting via Detail View | 198 |
| Advanced Options | 198 |
| Setting up Cron Scheduler | 200 |
| Setting Up in Unix/Linux | 200 |
| PDF Manager | 200 |
| Overview | 201 |
| PDF Manager Fields | 201 |
| PDF Manager Module Tab | 202 |
| Creating PDF Templates | 202 |
| Creating Via PDF Manager Module | 203 |
| Creating Via Duplication | 203 |
| Creating Content | 204 |
| Viewing PDF Templates | 205 |
| Viewing Via List View | 205 |
| Viewing Via Detail View | 206 |
| Viewing Via Recently Viewed | 206 |
| Searching PDF Templates | 206 |
| PDF Manager List View | 207 |

| | |
|---------------------------------------|-----|
| Pagination | 207 |
| Checkbox Selection | 208 |
| Actions Menu | 208 |
| Column Sorting | 209 |
| PDF Manager Detail View | 209 |
| Actions Menu | 209 |
| Next or Previous Record | 210 |
| Editing PDF Templates | 210 |
| Editing Via Detail View | 210 |
| Editing Report PDF Template | 211 |
| Deleting PDF Templates | 211 |
| Deleting Via Detail View | 211 |
| Mass Deleting Via List View | 212 |
| Adding a Header Image to PDF Template | 212 |
| Previewing PDF Templates | 213 |
| Web Logic Hooks | 215 |
| Overview | 215 |
| Web Logic Hook Fields | 215 |
| Web Logic Hooks Module Tab | 216 |
| Creating Web Logic Hooks | 216 |
| Creating Via Web Logic Hooks Module | 217 |
| Creating Via Duplication | 217 |
| Viewing Web Logic Hooks | 218 |
| Viewing Via List View | 218 |
| Viewing Via Record View | 219 |
| Viewing Via Recently Viewed | 219 |
| Searching Web Logic Hooks | 219 |
| Module Search | 219 |
| Creating a Filter | 220 |
| Saving a Filter | 221 |
| Web Logic Hooks List View | 222 |
| Checkbox Selection | 222 |
| Total Record Count | 223 |
| Mass Actions Menu | 224 |
| Column Sorting | 224 |
| Column Selection | 225 |
| Preview | 225 |
| Record Actions Menu | 226 |
| More Web Logic Hooks | 226 |
| Right Hand Side Drawer | 227 |
| Web Logic Hooks Record View | 227 |
| Actions Menu | 227 |
| Next or Previous Record | 228 |
| Sharing Web Logic Hooks | 228 |
| Viewing Web Logic Hook Change Logs | 229 |
| Editing Web Logic Hooks | 229 |

| | |
|-----------------------------------|-----|
| Editing Inline Via Record View | 230 |
| Editing Via Record View | 230 |
| Editing Via List View | 230 |
| Deleting Web Logic Hooks | 231 |
| Deleting Via Record View | 231 |
| Deleting Via List View | 231 |
| Mass Deleting Via List View | 232 |
| Exporting Web Logic Hooks | 233 |
| Mass Updating Web Logic Hooks | 233 |
| Finding Duplicate Web Logic Hooks | 235 |
| Merging Web Logic Hooks | 236 |
| Merging Via List View | 236 |
| Email | 238 |
| Overview | 238 |
| Email Settings | 238 |
| Outgoing Mail Configuration | 238 |
| Email Options | 240 |
| Email Security Settings | 240 |
| Related Contacts Emails | 241 |
| Campaign Email Settings | 241 |
| Email Archiving | 242 |
| Enabling Email Archiving | 242 |
| Using Email Archiving | 243 |
| Inbound Email | 244 |
| Inbound Email Fields | 245 |
| Inbound Email Module Tab | 247 |
| Creating Inbound Email Records | 249 |
| Creating Group Mail Accounts | 250 |
| Creating Bounce Handling Accounts | 251 |
| Creating Via Duplication | 252 |
| Viewing Inbound Email Records | 253 |
| Viewing Via List View | 253 |
| Viewing Via Detail View | 253 |
| Viewing Via Recently Viewed | 253 |
| Inbound Email List View | 255 |
| Modifying the Case Macro | 255 |
| Pagination | 255 |
| Checkbox Selection | 256 |
| Action Buttons | 256 |
| Column Sorting | 257 |
| Inbound Email Detail View | 257 |
| Action Buttons | 257 |
| Editing Inbound Email Records | 259 |
| Editing Via Detail View | 259 |
| Editing Via List View | 259 |
| Deleting Inbound Email Records | 260 |

| | |
|---------------------------------------|-----|
| Deleting Via Detail View | 260 |
| Mass Deleting Via List View | 260 |
| Creating Cases From Email | 262 |
| Email Queue | 262 |
| Viewing Via List View | 263 |
| Searching Queued Email | 263 |
| Basic Search | 263 |
| Advanced Search | 264 |
| Email Queue List View | 265 |
| Pagination | 265 |
| Checkbox Selection | 265 |
| Actions Menu | 266 |
| Column Sorting | 266 |
| Deleting Queued Email | 267 |
| Mass Deleting Via List View | 267 |
| Mass Updating Queued Email | 267 |
| Sending Queued Email | 268 |
| Developer Tools | 269 |
| Overview | 269 |
| Studio | 270 |
| Module Builder | 270 |
| Module Loader | 271 |
| Sugar Portal | 271 |
| Dropdown Editor | 271 |
| Adding Dropdown Lists | 271 |
| Viewing Dropdown Lists | 273 |
| Editing Dropdown Lists | 274 |
| Editing Sales Stages | 276 |
| Editing Time Intervals | 278 |
| Editing Role-Based Availability | 278 |
| Rename Modules | 280 |
| Display Modules and Subpanels | 281 |
| Configure Navigation Bar Quick Create | 283 |
| Workflow Management | 283 |
| Studio | 284 |
| Overview | 284 |
| Navigation | 284 |
| Main Panel | 284 |
| Modules Panel | 285 |
| Footer | 286 |
| Editing Labels | 287 |
| Fields | 288 |
| Field Types | 288 |
| Field Options | 290 |
| Creating Fields | 298 |
| Editing Fields | 300 |

| | |
|---|-----|
| Deleting Fields | 301 |
| Cloning Fields | 302 |
| Relationships | 304 |
| Relationship Types | 305 |
| Creating Relationships | 307 |
| Editing Relationships | 309 |
| Deleting Relationships | 310 |
| Layouts | 312 |
| Layout Types | 313 |
| Layout Options | 315 |
| Sync And Copy (Legacy Modules) | 316 |
| Editing Layouts | 317 |
| Editing Record View Layout | 317 |
| Creating Role-Based Record View Layouts | 320 |
| Copying a Role-View From a Customized Role-View Layout | 321 |
| Restoring Customized Role-Views to the Default Role-View Layout | 322 |
| Restoring the Default Role-View to the System Default Layout | 322 |
| Editing List View Layout | 323 |
| Editing Convert Lead Layout | 326 |
| Subpanels | 327 |
| Subpanel Options | 328 |
| Editing Subpanels | 328 |
| Mobile Layouts | 330 |
| Mobile Layout Types | 331 |
| Mobile Layout Options | 331 |
| Editing Mobile Layouts | 332 |
| Using Sugar Logic | 335 |
| Functions | 336 |
| Fields | 343 |
| Related Field | 343 |
| Rollup | 344 |
| Viewing Layout History | 344 |
| Restoring Layout Defaults | 346 |
| Resetting Modules | 346 |
| Exporting Customizations | 347 |
| Module Builder | 348 |
| Overview | 348 |
| Navigation | 349 |
| Main Panel | 349 |
| Packages Panel | 350 |
| Footer | 350 |
| Packages | 351 |
| Creating Packages | 351 |
| Deploying Packages | 352 |
| Deleting Packages | 353 |
| Modules | 354 |

| | |
|----------------------------------|-----|
| Module Types | 355 |
| Module Options | 355 |
| Creating Modules | 356 |
| Creating Modules Via Package | 356 |
| Creating Modules Via Duplication | 357 |
| Modifying Modules | 359 |
| Modifying Labels | 359 |
| Fields | 360 |
| Field Types | 360 |
| Field Options | 363 |
| Creating Fields | 370 |
| Editing Fields | 371 |
| Deleting Fields | 373 |
| Cloning Fields | 374 |
| Relationships | 376 |
| Relationship Types | 377 |
| Creating Relationships | 380 |
| Editing Relationships | 381 |
| Deleting Relationships | 382 |
| Layouts | 383 |
| Layout Types | 384 |
| Layout Options | 385 |
| Editing Layouts | 386 |
| Editing Record View Layout | 386 |
| Editing List View Layout | 388 |
| Mobile Layouts | 391 |
| Mobile Layout Types | 391 |
| Mobile Layout Options | 392 |
| Editing Mobile Layouts | 392 |
| Available Subpanels | 395 |
| Subpanel Options | 396 |
| Editing Subpanel Layout | 396 |
| Using Sugar Logic | 399 |
| Functions | 399 |
| Fields | 406 |
| Related Field | 406 |
| Rollup | 407 |
| Viewing Layout History | 408 |
| Restoring Layout Defaults | 409 |
| Deleting Modules | 409 |
| Module Loader | 410 |
| Overview | 410 |
| Module Loader Layout | 411 |
| Module Loader Fields | 411 |
| Uploading Packages | 413 |
| Installing Packages | 413 |

| | |
|---|-----|
| Uninstalling Packages | 414 |
| Installing Role-Based Customizations | 416 |
| Importing Role-Based Custom Record Views | 417 |
| Importing Role-Based Custom Dropdown Lists | 417 |
| Sugar Portal | 421 |
| Overview | 421 |
| Configure Portal | 421 |
| Theme Portal | 423 |
| Layouts | 424 |
| Record View | 424 |
| List View | 425 |
| Workflow Management | 425 |
| Overview | 425 |
| Workflow Fields | 426 |
| Workflow Module Tab | 427 |
| Creating Workflows | 428 |
| Creating Via Workflow Module | 428 |
| Creating Via Duplication | 429 |
| Creating Workflow Conditions | 430 |
| Creating "After Time Elapsed" Workflow Conditions | 431 |
| Creating "When Record Saves" Workflow Conditions | 431 |
| Creating Workflow Alerts | 432 |
| Creating Workflow Actions | 435 |
| Workflow Action Types | 436 |
| Viewing Workflows | 438 |
| Viewing Via List View | 438 |
| Viewing Via Detail View | 438 |
| Viewing Via Recently Viewed | 438 |
| Searching Workflows | 439 |
| Basic Search | 439 |
| Advanced Search | 440 |
| Workflows List View | 441 |
| Pagination | 441 |
| Checkbox Selection | 441 |
| Column Sorting | 442 |
| Workflow Detail View | 442 |
| Actions Menu | 442 |
| Next or Previous Record | 443 |
| Conditions Subpanel | 443 |
| Alert Subpanels | 444 |
| Actions Subpanel | 445 |
| Editing Workflows | 445 |
| Editing Via Detail View | 446 |
| Editing Via List View | 446 |
| Deleting Workflows | 446 |
| Deleting Via Detail View | 446 |

| | |
|---|-----|
| Mass Deleting Via List View | 447 |
| Workflow Alert Templates | 448 |
| Alert Template Fields | 448 |
| Creating Alert Templates | 449 |
| Creating Alert Templates Via Workflows Module | 449 |
| Creating Alert Templates Via Duplication | 451 |
| Inserting Variables | 452 |
| Viewing Alert Templates | 453 |
| Viewing Alert Templates Via List View | 453 |
| Viewing Alert Templates Via Detail View | 454 |
| Viewing Alert Templates Via Emails Module | 454 |
| Editing Alert Templates | 454 |
| Deleting Alert Templates | 455 |
| Time Intervals for Time Elapsed Workflows | 455 |
| Workflow Sequence | 457 |
| Products and Quotes | 458 |
| Overview | 458 |
| Product Catalog | 458 |
| Product Catalog Fields | 459 |
| Product Catalog Module Tab | 461 |
| Creating Products For Catalog | 462 |
| Creating Via Product Catalog | 462 |
| Creating Via Duplication | 463 |
| Importing Products for Catalog | 463 |
| Viewing Products In Catalog | 464 |
| Viewing Via List View | 464 |
| Viewing Via Record View | 465 |
| Viewing Via Recently Viewed | 465 |
| Searching Product Catalog | 465 |
| Module Search | 466 |
| Creating a Filter | 467 |
| Saving a Filter | 468 |
| Global Search | 469 |
| Product Catalog List View | 469 |
| Checkbox Selection | 470 |
| Total Record Count | 470 |
| Mass Actions Menu | 471 |
| Column Reordering | 472 |
| Column Resizing | 472 |
| Column Sorting | 473 |
| Column Selection | 473 |
| Preview | 474 |
| Record Actions Menu | 474 |
| More Product Catalog | 475 |
| Right Hand Side Drawer | 475 |
| Intelligence Pane | 476 |

| | |
|--|-----|
| Product Catalog Record View | 477 |
| Actions Menu | 477 |
| Next or Previous Record | 478 |
| Intelligence Pane | 478 |
| Editing Products | 480 |
| Editing Inline Via Record View | 480 |
| Editing Via Record View | 481 |
| Editing Inline Via List View | 481 |
| Deleting Products | 482 |
| Deleting Via Record View | 482 |
| Deleting Via List View | 482 |
| Mass Deleting Via List View | 483 |
| Exporting Products | 484 |
| Mass Updating Products | 484 |
| Recalculating Calculated Values | 486 |
| Finding Duplicate Products | 486 |
| Merging Products | 488 |
| Merging Via List View | 488 |
| Sharing Products | 489 |
| Downloading Product Information as a PDF | 490 |
| Emailing Product Information as a PDF | 490 |
| Viewing Product Change Logs | 491 |
| Product Categories | 492 |
| Product Category Fields | 492 |
| Product Categories Module Tab | 493 |
| Creating Product Categories | 494 |
| Creating Via Product Categories Module | 494 |
| Creating Via Duplication | 495 |
| Importing Product Categories | 495 |
| Viewing Product Categories | 496 |
| Viewing Via List View | 496 |
| Viewing Via Record View | 497 |
| Viewing Via Recently Viewed | 497 |
| Viewing Via Reports | 497 |
| Searching Product Categories | 498 |
| Module Search | 498 |
| Creating a Filter | 499 |
| Saving a Filter | 501 |
| Global Search | 501 |
| Product Categories List View | 502 |
| Checkbox Selection | 502 |
| Total Record Count | 503 |
| Mass Actions Menu | 503 |
| Column Reordering | 504 |
| Column Resizing | 504 |
| Column Sorting | 505 |

| | |
|---|-----|
| Column Selection | 505 |
| Preview | 506 |
| Record Actions Menu | 506 |
| More Product Categories | 507 |
| Right Hand Side Drawer | 507 |
| Ordering Product Categories | 508 |
| Intelligence Pane | 508 |
| Product Categories Record View | 509 |
| Actions Menu | 509 |
| Next or Previous Record | 510 |
| Intelligence Pane | 510 |
| Editing Product Categories | 511 |
| Editing Inline Via Record View | 511 |
| Editing Via Record View | 511 |
| Editing Inline Via List View | 512 |
| Deleting Product Categories | 512 |
| Deleting Via Record View | 512 |
| Deleting Via List View | 513 |
| Mass Deleting Via List View | 513 |
| Exporting Product Categories | 514 |
| Finding Duplicate Product Categories | 515 |
| Merging Product Categories | 516 |
| Merging Via List View | 516 |
| Sharing Product Categories | 518 |
| Downloading Product Category Information as a PDF | 518 |
| Emailing Product Category Information as a PDF | 519 |
| Viewing Product Category Change Logs | 520 |
| Product Types | 520 |
| Product Type Fields | 520 |
| Product Types Module Tab | 521 |
| Creating Product Types | 522 |
| Importing Product Types | 523 |
| Product Types List View | 523 |
| Column Sorting | 523 |
| Ordering Product Types | 524 |
| Editing Product Types | 524 |
| Deleting Product Types | 525 |
| Manufacturers | 525 |
| Manufacturers Fields | 525 |
| Manufacturers Module Tab | 526 |
| Creating Manufacturers | 526 |
| Importing Manufacturers | 527 |
| Manufacturers List View | 528 |
| Column Sorting | 528 |
| Ordering Manufacturers | 528 |
| Editing Manufacturers | 529 |

| | |
|---|-----|
| Deleting Manufacturers | 529 |
| Shipping Providers | 530 |
| Shipping Provider Fields | 530 |
| Shipping Providers Module Tab | 530 |
| Creating Shipping Providers | 531 |
| Shipping Providers List View | 531 |
| Column Sorting | 532 |
| Ordering Shipping Providers | 532 |
| Editing Shipping Providers | 532 |
| Deleting Shipping Providers | 532 |
| Tax Rates | 533 |
| Tax Rate Fields | 533 |
| Tax Rates Module Tab | 533 |
| Creating Tax Rates | 534 |
| Importing Tax Rates | 535 |
| Tax Rates List View | 535 |
| Column Sorting | 536 |
| Ordering Tax Rates | 536 |
| Editing Tax Rates | 536 |
| Deleting Tax Rates | 537 |
| Bug Tracker | 537 |
| Overview | 537 |
| Release Fields | 537 |
| Release Module Tab | 538 |
| Creating Releases | 538 |
| Viewing Releases | 539 |
| Viewing Via Module | 539 |
| Editing Releases | 540 |
| Deleting Releases | 541 |
| Opportunities Configuration | 541 |
| Overview | 542 |
| Configuring Opportunities | 543 |
| Moving to Opportunities With Revenue Line Items | 543 |
| Effects of the Change | 543 |
| Moving to Opportunities Only | 544 |
| Effects of the Change | 544 |
| Forecast Configuration | 545 |
| Overview | 545 |
| Configuring Forecasts | 546 |
| Time Periods | 546 |
| Ranges | 548 |
| Two Ranges | 548 |
| Three Ranges | 549 |
| Custom Ranges | 549 |
| Scenarios | 551 |
| Worksheet Columns | 551 |

| | |
|---------------------------------------|-----|
| Editing Forecast Configurations | 552 |
| Contract Types | 552 |
| Overview | 552 |
| Contract Type Fields | 553 |
| Contract Types Module Tab | 553 |
| Creating Contract Types | 554 |
| Viewing Contract Types | 554 |
| Viewing Via List View | 555 |
| Viewing Via Detail View | 555 |
| Viewing Via Recently Viewed | 555 |
| Searching Contract Types | 555 |
| Basic Search | 556 |
| Advanced Search | 556 |
| Contract Types List View | 557 |
| Pagination | 557 |
| Checkbox Selection | 558 |
| Actions Menu | 558 |
| Column Sorting | 559 |
| Contract Types Detail View | 559 |
| Documents Subpanel | 559 |
| Editing Contract Types | 560 |
| Editing Via List View | 560 |
| Ordering Contract Types | 560 |
| Deleting Contract Types | 561 |
| Mass Deleting Via List View | 561 |
| Exporting Contract Types | 561 |
| Employee Records | 562 |
| Overview | 562 |
| Employee Fields | 562 |
| Employees Module Tab | 563 |
| Creating Employees | 564 |
| Creating Via Employees Module | 565 |
| Creating Via Users Module | 565 |
| Creating Via Duplication | 566 |
| Viewing Employees | 566 |
| Viewing Via List View | 566 |
| Viewing Via Detail View | 567 |
| Viewing Via Recently Viewed | 567 |
| Searching Employees | 567 |
| Basic Search | 568 |
| Advanced Search | 568 |
| Employees List View | 569 |
| Pagination | 570 |
| Checkbox Selection | 570 |
| Actions Menu | 571 |
| Column Sorting | 571 |

| | |
|---|-----|
| Employees Detail View | 571 |
| Next or Previous Record | 572 |
| Editing Employees | 572 |
| Editing Via Detail View | 573 |
| Editing Via List View | 573 |
| Deleting Employees | 574 |
| Exporting Employees | 574 |
| Mass Updating Employees | 575 |
| Knowledge Base Administration | 576 |
| Overview | 576 |
| Admin Actions Menu | 576 |
| Tag Tree | 577 |
| Nested Folders | 577 |
| Checkbox Selection | 578 |
| Articles List View | 578 |
| Pagination | 579 |
| Checkbox Selection | 579 |
| Column Sorting | 580 |
| Edit Button | 580 |
| Creating New Tags | 580 |
| Deleting Tags | 581 |
| Renaming Tags | 582 |
| Moving Selected Articles | 583 |
| Applying Tags To Articles | 585 |
| Deleting Selected Articles | 586 |
| Enabling Search on MSSQL | 587 |
| Process Author | 588 |
| Overview | 588 |
| Scope | 588 |
| Prerequisites | 589 |
| Core Concepts | 589 |
| Process Author Modules | 589 |
| Basic Visual Notation Elements | 592 |
| Basic Steps to Automate a Business Process | 595 |
| Creating a Process Author Dashboard | 596 |
| Processes Dashlet | 597 |
| Process Definitions Dashlet | 598 |
| Process Email Templates Dashlet | 600 |
| Process Business Rules Dashlet | 602 |
| Process Management List View | 603 |
| Preview | 605 |
| Record Actions Menu | 605 |
| Searching Processes | 607 |
| Unattended Processes | 608 |
| Terminated vs. Cancelled Processes | 610 |
| Importing and Exporting Process Author Module Records | 610 |

| | |
|--|-----|
| Process Author Settings | 612 |
| Process Author Log Viewer | 613 |
| Process Author Scheduler | 614 |
| Process Business Rules | 614 |
| Overview | 614 |
| Process Business Rule Fields | 615 |
| The Process Business Rules Module Tab | 616 |
| Creating Process Business Rules | 617 |
| Designing a Process Business Rule in the Rules Builder | 618 |
| Condition and Conclusion Elements | 619 |
| Operators | 619 |
| Rule Sets | 620 |
| The Rules Builder User Interface | 621 |
| Process Email Templates | 622 |
| Overview | 622 |
| The Process Email Template Module Tab | 623 |
| Creating Process Email Template Records | 624 |
| Designing a Process Email Template from Design View | 626 |
| The Design Toolbar | 627 |
| Using the Field Selector Tool to Insert Custom Variables | 628 |
| Process Definitions | 630 |
| Overview | 630 |
| Prerequisites | 632 |
| Process Definition Fields | 632 |
| Process Definitions Module Tab | 633 |
| Creating Process Definitions | 634 |
| Designing Process Definitions | 635 |
| Editing and Annotating Process Definitions | 636 |
| Sequence Flow | 636 |
| Adding Sequence Connectors | 636 |
| Removing Sequence Connectors | 637 |
| Comments | 638 |
| Editing Tools | 638 |
| Moving and Deleting Design Elements | 639 |
| Adding a Start Event | 641 |
| Adding Multiple Start Events | 642 |
| Adding Intermediate Events | 644 |
| Wait Events | 645 |
| Receive Message Events | 647 |
| Send Message Events | 648 |
| Adding Form Activities | 650 |
| Forms Setting | 651 |
| General Tab | 652 |
| Read-Only Fields Tab | 653 |
| Required Fields Tab | 654 |
| Expected Time Tab | 654 |

| | |
|---|-----|
| Users Setting | 655 |
| Static Assignment | 655 |
| Round-Robin | 656 |
| Self Service | 657 |
| Adding Actions | 657 |
| Business Rule | 659 |
| Assign User | 660 |
| Round Robin | 661 |
| Change Field | 663 |
| Add Related Record | 667 |
| Adding Gateway Elements | 670 |
| Default Sequence Flows | 672 |
| Exclusive Gateways | 673 |
| Divergent Exclusive Gateway | 673 |
| Convergent Exclusive Gateway | 675 |
| Inclusive Gateways | 675 |
| Parallel Gateways | 677 |
| Divergent Parallel Gateway | 678 |
| Convergent Parallel Gateway | 679 |
| Event-Based Gateways | 679 |
| Adding End Events | 679 |
| Do Nothing | 680 |
| Terminate Process | 680 |
| Send Message | 681 |
| Setting Conditions | 682 |
| Creating Conditions for Events and Actions | 682 |
| Logical Operations | 683 |
| Module Field Evaluation | 684 |
| User Evaluation | 685 |
| Mathematical Operations | 689 |
| Fixed Date | 690 |
| Time Span | 691 |
| Sugar Date Variables | 692 |
| Creating Conditions for Activities and Gateways | 693 |
| Form Response Evaluations | 694 |
| Business Rule Evaluations | 697 |
| Configuring Process Termination Settings | 700 |
| Resolving Errors in the Element Errors Panel | 702 |
| Exiting the Visual Designer | 704 |
| Returning to the Visual Designer | 704 |
| Enabling and Disabling Process Definitions | 705 |
| Enabling Process Definitions | 705 |
| Disabling Process Definitions | 706 |
| Advanced Configuration Options | 707 |
| Overview | 707 |
| System Configuration | 707 |

| | |
|--|------------|
| Configuring File Permissions | 707 |
| Allowing POP Email Accounts | 709 |
| Security Options | 709 |
| Locking Down Admin Control | 709 |
| Locking Down Module Loader | 709 |
| Locking Down Backups | 710 |
| Enabling Sites as Referers | 710 |
| Performance | 710 |
| Recommended Server Settings | 711 |
| Limiting System Resources | 711 |
| Configuring a Slave Database | 712 |
| Changing the Upload Directory | 713 |
| Changing the Cache Directory | 713 |
| Configuring Count Queries | 714 |
| Disabling Related Calculation Fields | 714 |
| Disabling Automatic Searches | 714 |
| Using a Custom Page For Campaign Trackers | 715 |
| Configuring Cron for Schedulers | 717 |

Sugar Ultimate 7.6 Administration Guide

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

Last Modified: 01/18/2016 02:20pm

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
- [PDF Manager](#) to create templates controlling the appearance of generated PDF files
- [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

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

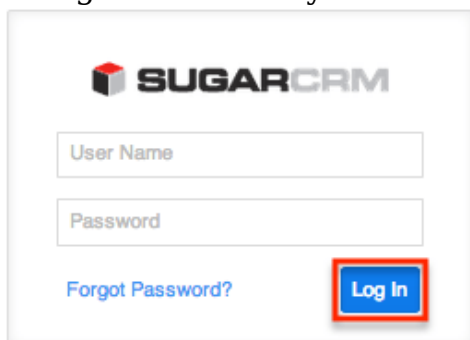
Admin Wizard

Overview

Sugar offers administrators a wide range of configuration options to set up their account. Upon your initial log into Sugar, you will go through configuring some basic settings (i.e. Your Information, Your Locale, etc.) for your user profile. You may skip these steps and configure these settings in your user preferences at a later time. Once your user profile set up is complete, you will be able to navigate to a specific area of Sugar to perform various administrative functions (e.g. importing data, creating users, configuring the application via Studio, etc.) as well. Please note that system administrators can also set up each user's basic settings when creating a user in Sugar. This documentation will cover the various options available when first accessing your Sugar account.

Login Screen

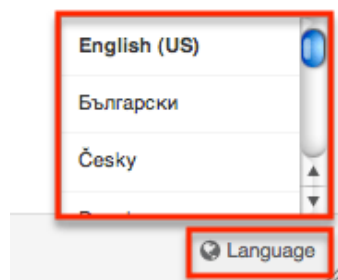
The Sugar login screen is where you enter your login credentials (user name and password) to access your instance. Enter in your instance URL (e.g. <https://example.sugarondemand.com>) on your web browser to load Sugar's login screen. If you do not know your instance URL or login credentials, please 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

User's have the option to choose the primary language they want displayed in Sugar by clicking the Language icon on the bottom right of the Login screen. The Language dropdown list will appear allowing you to select the appropriate language you want displayed in your Sugar account. The out-of-the-box default language 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:

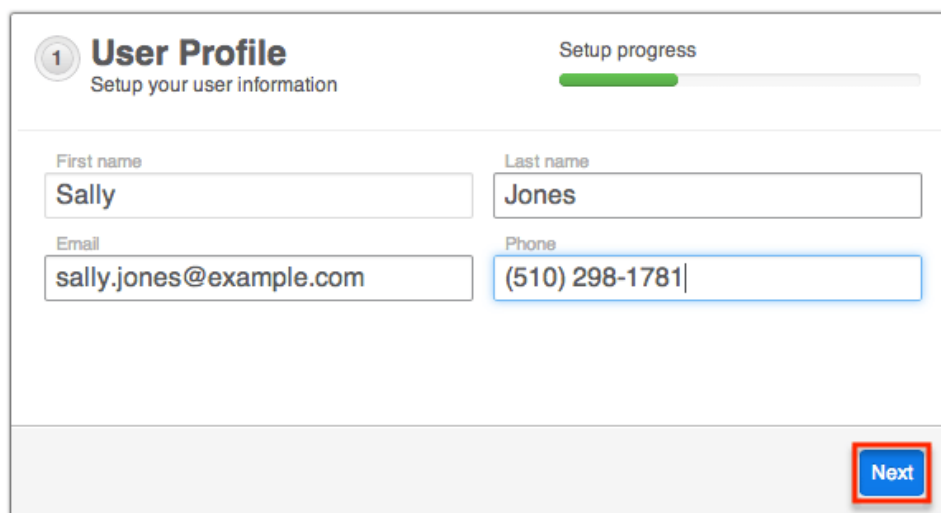
| | |
|----------------------|-----------------|
| Albanian | Italian |
| Arabic | Japanese |
| Brazilian Portuguese | Korean |
| Bulgarian | Latvian |
| Catalan | Lithuanian |
| Chinese | Norwegian |
| Czech | Polish |
| Danish | Portuguese |
| Dutch | Romanian |
| English (UK) | Russian |
| English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

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, and phone) 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.



The screenshot shows a 'User Profile' setup wizard. At the top left, there is a step indicator '1' and the title 'User Profile' with the subtitle 'Setup your user information'. To the right, there is a 'Setup progress' indicator with a green bar. Below this, there are four input fields: 'First name' with the value 'Sally', 'Last name' with the value 'Jones', 'Email' with the value 'sally.jones@example.com', and 'Phone' with the value '(510) 298-1781'. A blue 'Next' button is located at the bottom right of the form.

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

Your Locale

The Your Locale step is where you can configure the date, time, 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.

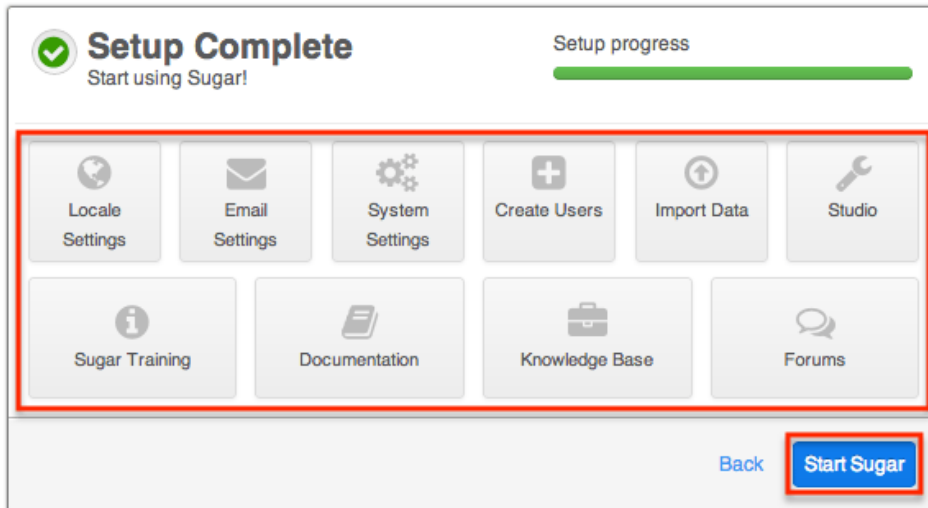
The following options are available to configure your locale settings:

- 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.
- Name Format : Select the format you want the concatenated name fields displayed in Sugar's list view and record view.

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

The screenshot shows the 'User Locale Settings' configuration page. At the top left, there is a section header '2 User Locale Settings' with a subtitle 'Set your time zone, date, and name formats'. To the right of this header is a 'Setup progress' indicator with a green bar. Below the header, there are four dropdown menus arranged in a 2x2 grid: 'Time Zone' (set to 'America/New York (GMT-4:00)'), 'Time Format' (set to '11:00pm'), 'Date Format' (set to '12/23/2010'), and 'Name Format' (set to 'Dr. David Livingstone'). At the bottom right of the form, there are two buttons: 'Back' and 'Next'. The 'Next' button is highlighted with a red rectangular box.

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 "Start Sugar" to go directly into your Sugar account if you wish to configure these settings at a later time.



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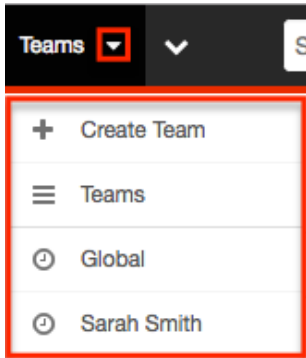
Team Management

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 can be accessed by navigating to the Admin page and clicking "Team Management" in the Users section. Once in the Teams list view, you can click the triangle in the Teams module tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The [Recently Viewed](#) menu displays the list of teams you last viewed in the module. Please note that clicking the module tab allows you to access the Teams list view.



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 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

For every user that is created in Sugar, a corresponding private team is automatically created in the Teams module. By default, the private team name is the user's first and last name. A private team name will be updated any time the corresponding user's profile is edited and re-saved, even if the change was not made to the user's first or last name. For example, the private team for Jane Smith will be automatically named "Jane Smith". If the administrator edits private team "Jane Smith" to "Jane Smith-HR", and then user Jane Smith later updates the phone number on her user profile, Sugar will revert the private team name back to the user's first and last name, "Jane Smith".

If your organization plans to edit private team names, you must disable the automatic update feature. Navigate to Admin > System Settings and select the checkbox next to "Prevent name changes by users to update their Private Team Name". For more information on this setting, please refer to the [System](#) section of the Administration Guide.

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 hierarchy 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 hierarchy.

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 an "Unlink" 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@example.com | |
| Will Westin | will | Member | will@example.com | unlink |

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](#).

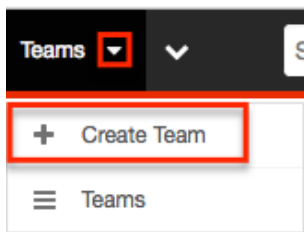
For information on creating Private Teams, please review the [Repairing Teams](#) section of this documentation.

Creating Via Teams Module

The most common way to create a new team is via the Create Team option in the . 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 the Teams module:

1. Navigate to Admin > Team Management.
Note: The [Teams list view](#) will open displaying all existing teams that are currently available.
2. Click the triangle in the Teams module tab and select "Create Team".



3. Enter the appropriate values for fields in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
4. On the team's detail view, [add users](#) that are members of this team.

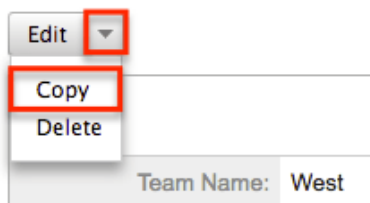
Creating Via Duplication

You can also create a new team by duplicating an existing team. The Copy 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 "Copy".

Teams: West



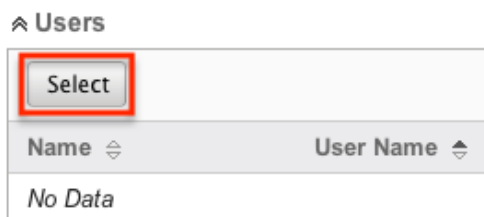
3. The displayed edit view is pre-populated with the original team's values. Update the name field, and description if need be, then click "Save".

-
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.

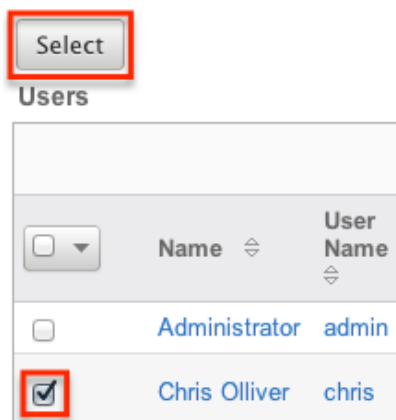
Adding Users to Teams Via Teams Module

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 list view, 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

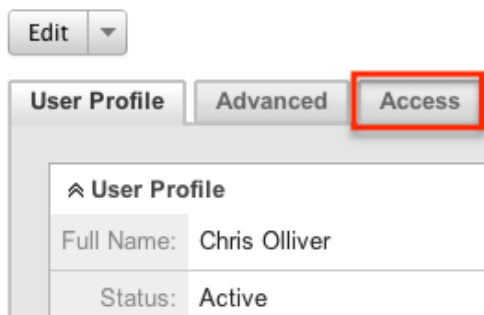
⤴ Users

| Name | User Name |
|---------------|-----------|
| Chris Olliver | chris |

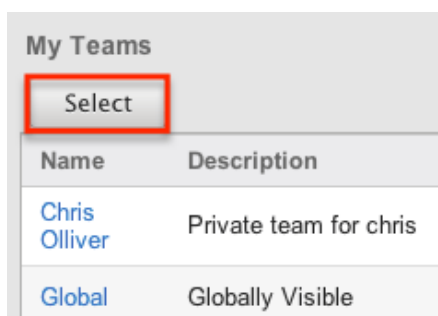
Adding Users to Teams Via Users Module

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
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

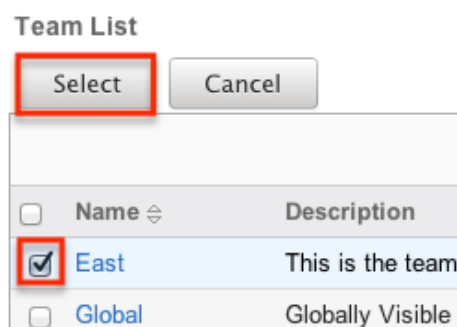


4. Scroll past the role chart to the "My Teams" subpanel and click "Select"

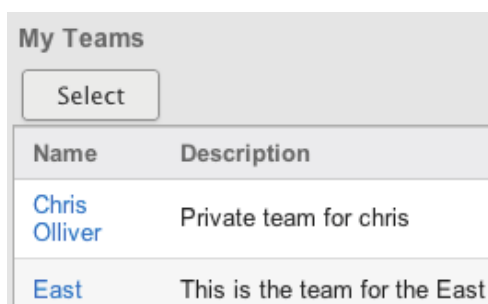


5. Use the popup search menu to search for and select the team(s) you would like to add to this user where you can either click on the team's name or, if

selecting multiple teams, click their corresponding checkboxes and then click "Select"



6. 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



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](#) section of this documentation.

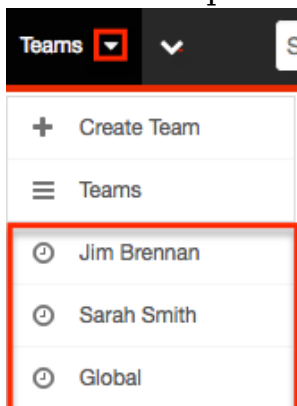
Viewing Via Detail View

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.

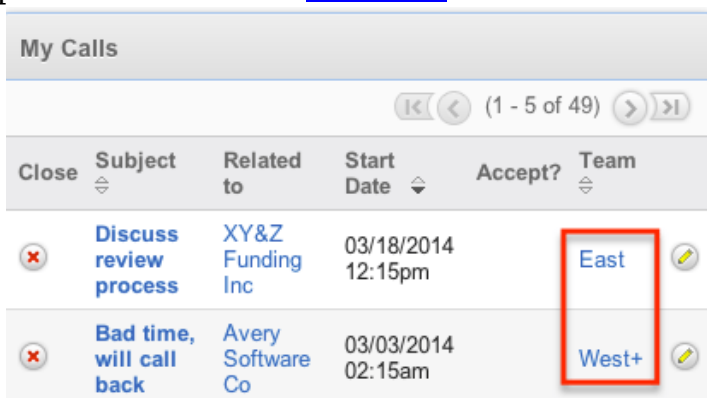
Viewing Via Recently Viewed

As you access different teams, Sugar will keep track of which teams you have recently viewed. Click the triangle in the [Teams module tab](#) to see a list of the 3 records you most recently viewed in the module. Clicking the record's name within the list will open it 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.






| 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 |

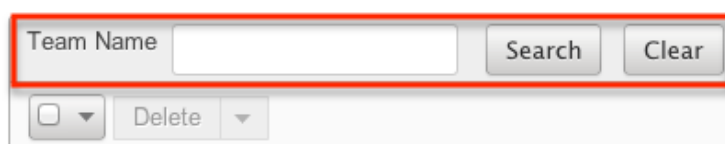
Searching Teams

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](#)



Team Name Search Clear

Delete

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.

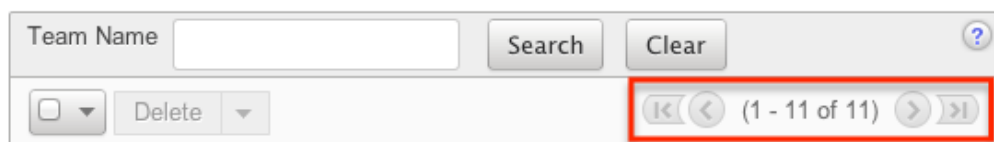
Teams List View

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.

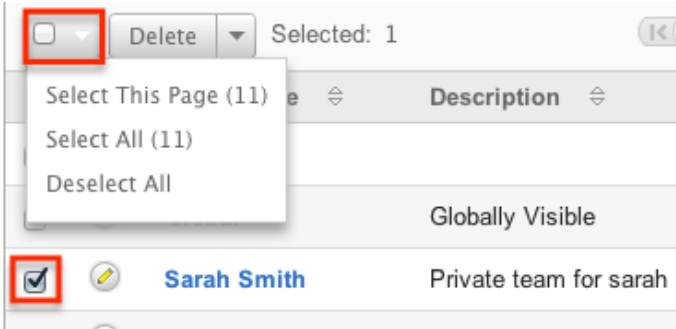
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.



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:

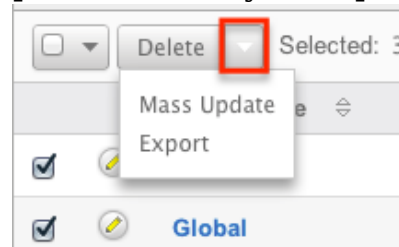
- **Select This Page** : Selects all records shown on the current page of results
- **Select All** : Selects all records in the current search results across all pages of results
- **Deselect All** : Deselects all records that are currently selected



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.



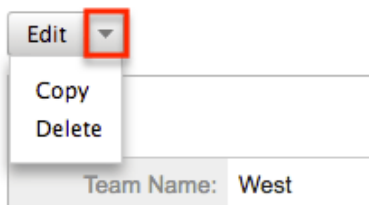
Teams Detail View

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.

Teams: West



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

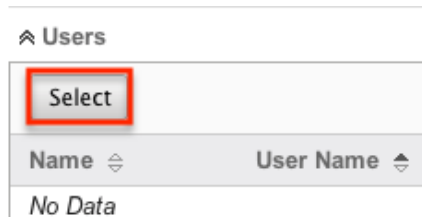
| Menu Item | Description |
|------------------------|--|
| Edit | Edit the name and description of this team |
| Copy | Duplicate this team to create a new team |
| Delete | Delete this team |

Users Subpanel

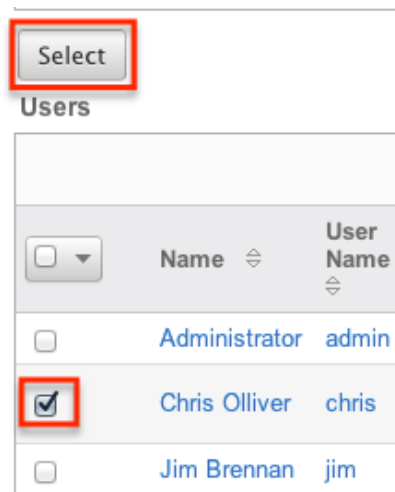
A user has to be associated to a team to be able to take on the team's membership settings. Assigning a user is much like any other many to many relationship in

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 users to a team, follow the following steps:

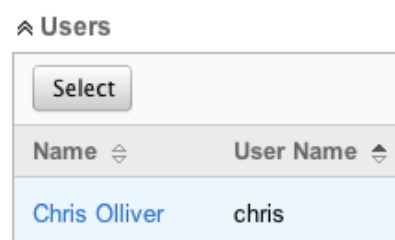
1. Navigate to the detail view of the team that you would like to edit.
2. At the bottom of the page, click "Select User" from the Users subpanel



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: Chris Olliver

Edit ▾

| | |
|--|---------------|
|  | |
| Team Name: | Chris Olliver |

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 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.

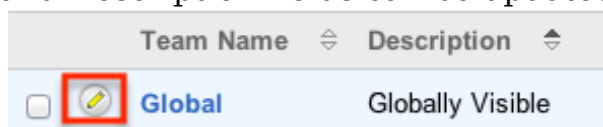
Teams: Chris Olliver

Edit ▾

| | |
|--------------|------------------------|
| | |
| Team Name: | Chris Olliver |
| Description: | Private team for chris |

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.



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.



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

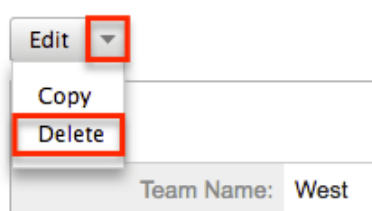
deleted. To delete a private team, first delete the user via the user's detail view, following the steps from [User Management](#).

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: West

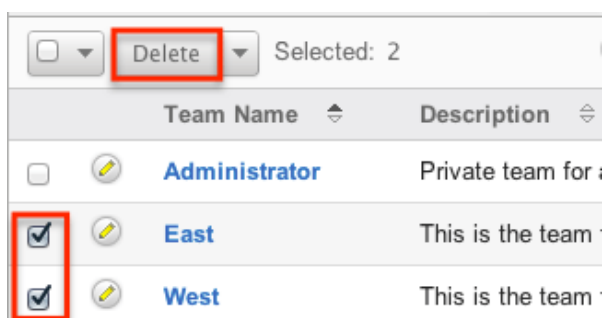


3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

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

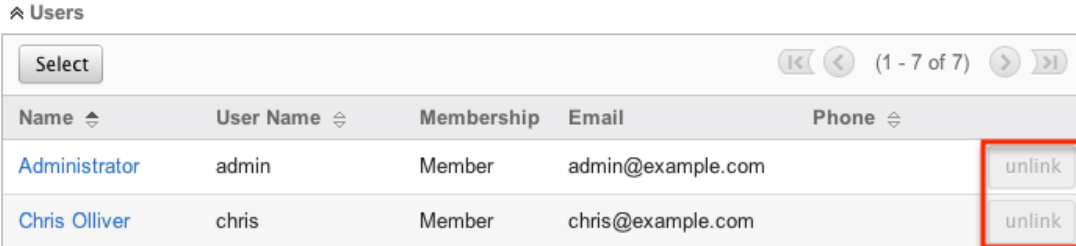
application times out while deleting a large number of team records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

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 "unlink" to the right of the user's row



| Name | User Name | Membership | Email | Phone |
|---------------|-----------|------------|-------------------|--------|
| Administrator | admin | Member | admin@example.com | unlink |
| Chris Olliver | chris | Member | chris@example.com | unlink |

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

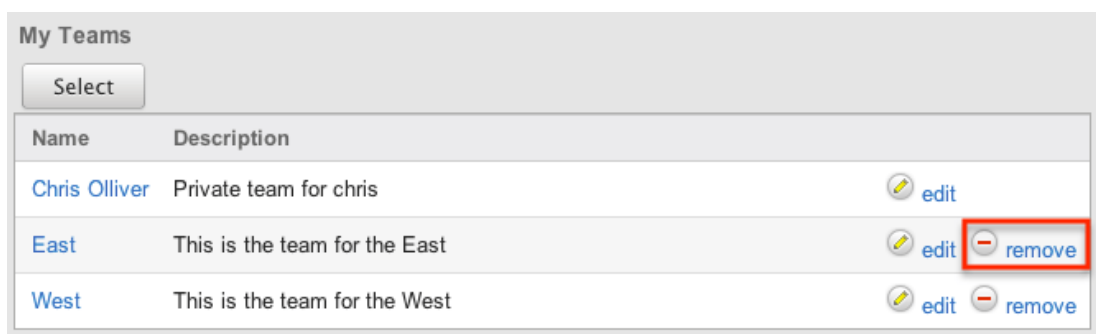
To remove a team from a user, use the following steps:

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

Chris Olliver



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 |

Last Modified: 01/24/2017 08:12pm

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

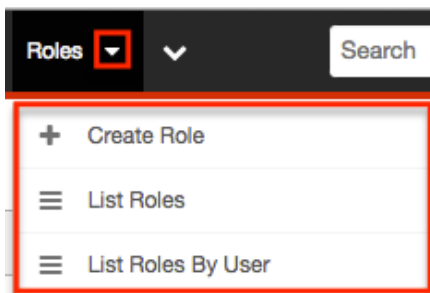
imposed by Role Management. For more information on System Administrator users, please review the [User Management](#) documentation.

Note: Roles are only able to allow or deny access to the entire Forecasts module. Because the data used in the Forecasts module makes use of data in the Opportunities, Products, Quotas, Worksheet and TimePeriod modules, the Forecasts module does not respect the module or field-level ACLs specified in these modules. For example, the opportunities data that is shown in the Forecasts module worksheets will be shown and editable regardless of whether or not the user has access to the Opportunities module or has field-level restrictions in that module.

In addition, 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 can be accessed by navigating to the Admin page and clicking "Role Management" in the Users section. Once in the Roles list view, you can click the triangle in the Roles module tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The [Recently Viewed menu](#) displays the list of roles you last viewed in the module. Please note that clicking the module tab allows you to access the Roles list view.



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

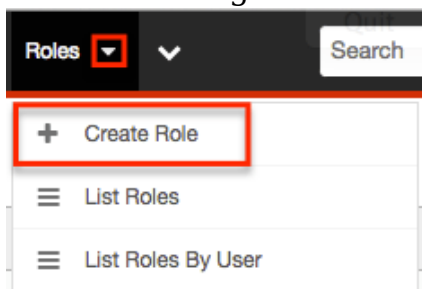
There are two methods that can be used to create roles in Sugar: via the Create Role option or by duplicating and then editing an existing role. After initially creating the role, the administrator will need to set the necessary module and field permissions, and assign users to the role.

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 the Roles module:

1. Navigate to the Admin > Role Management.
Note: The [Roles list view](#) will open, displaying all existing roles that are currently available.
2. Click the triangle in the Roles module tab and select "Create Role".



3. Enter the appropriate values for fields in the edit view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.
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.

- Click the Actions menu and select "Duplicate".
Customer Support Administrator



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

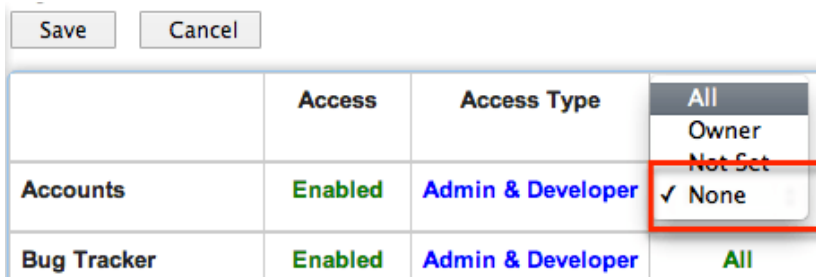
Setting Module-Level Permissions

The Role Chart is comprised 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 points between the columns and module roles define 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:

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



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

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

Please scroll below this table for an explanation of each configuration option listed in "Standard Cell Options":

| 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 | Restrict users from deleting or merging records in this module. This role setting affects merge functionality in Sugar because "Merge" deletes existing records that are not rolled up to the primary record. |
| Edit | All Owner Not Set None | Restrict users from editing or creating records in this module. This role setting affects the create functionality because the process of creating a record functions the same way as editing. |
| Export | All Owner Not Set None | Restrict users from exporting data from this module to their local computers. This role |

| | | |
|-------------|---------------------------------|--|
| | | setting affects usage of the Sugar API, which is the framework used for external connections, such as the Outlook Plug-in. For more information on exporting, please review the Export documentation. |
| Import | All Not Set None | Restrict users from importing data into this module. This role setting affects usage of the Sugar API, which is the framework used for external connections, such as the Outlook Plug-in. For more information on importing, please review the Import documentation. |
| List | All Owner Not Set None | Restrict a user's ability to see records in a list view or subpanel. A module's list view will not be visible for users where "List" is set to "None". |
| Mass Update | All Not Set None | Restrict users from using the Mass Update functionality in this module. The Mass Update option will not be visible on the list view's actions menu when "Mass Update" is set to "None". |
| View | All Owner Not Set None | Restrict access to the record view of specific records. If "View" is set to "None", the module's list view will display record names that are not hyperlinked to the corresponding record view. Users with View permission will be able to click on the record names |

| |
|---|
| from list view to see the record's details. |
|---|

| |
|---|
| Note: If a module's View setting is "None" or "Owner", the access level for "Edit" and "List" must be set to the same value. This will ensure desired functionality for SugarCRM Mobile and other API-based applications. |
|---|

The "Access" column provides the following options:

- **Enabled** : The user is allowed access to this module in Sugar.
- **Not Set** : The user is neither restricted nor granted access to this module. When permission is "Not Set" the user will default to having "Enabled" access in Sugar.
- **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.

Note: To ensure proper functionality, a user's access to the Revenue Line Items and Opportunities modules should be consistently configured. The user should not have access to one module without access to the other.

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** : The user is neither restricted nor granted access to this module. When permission is "Not Set" the user will default to having "Normal" access in Sugar.
- **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.
Note: 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.

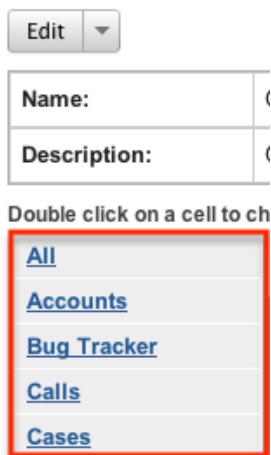
The function specific columns (Edit, Delete, etc.) provide the following options:

- All : The user will be able to perform this action on any and all records that can be accessed in Sugar.
- Owner : The user will only be able to perform this action if he or she is the "Assigned To" user on the record.
- Not Set : The user is neither restricted nor granted access to this function. When permission is "Not Set" the user will default to having "All" access in Sugar.
- None : The user is not able to perform this action while using this module in Sugar.

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:

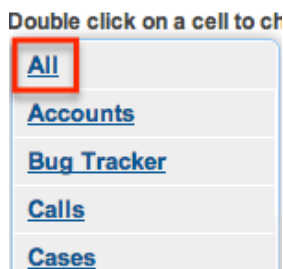
1. Navigate to Admin > Role Management
2. Select the module you would like to edit the field-level permissions for from the far left list



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 <input type="checkbox"/> Owner Read/Owner Write <input type="checkbox"/> None | Created By [+] | Not Set |
| Employees [+] | | 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



The field-level access options are explained below:

- Not Set : The user is neither restricted nor granted 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 record view (for Sidecar modules) or edit view (for Legacy modules) layout.
- 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 record view (for Sidecar modules) or edit view (for Legacy modules) layout 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 in Sugar.
- 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 appear on the layout (e.g. Record View) but will display "No Access" for Sidecar modules (e.g. Accounts). For Legacy modules (e.g. Quotes), the field will not appear on any layout and will display a blank space for the edit view and detail view layouts.

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.

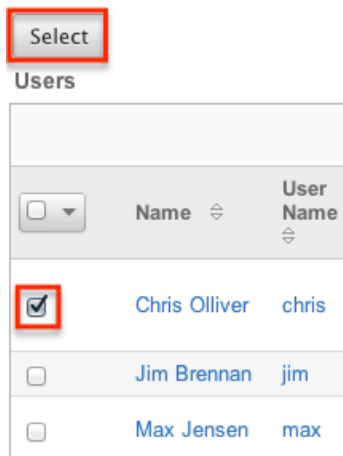
Assigning Via Role Management

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

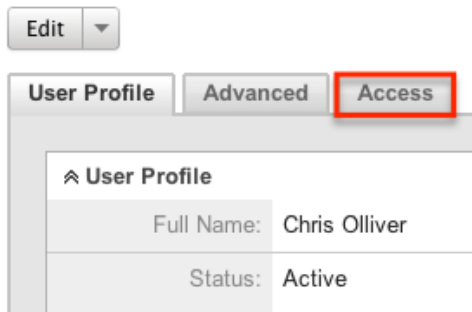
⌄ Users

| Select User | |
|---------------|-------------|
| Name ⌄ | User Name ⌄ |
| Chris Olliver | chris |

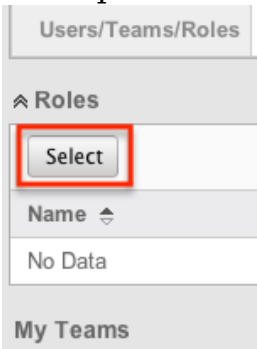
Assigning Via User Management

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:

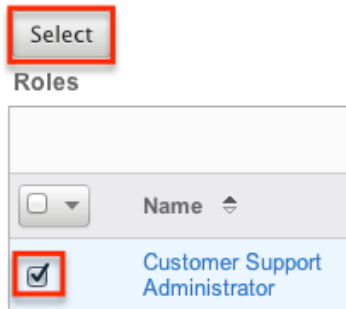
1. Navigate to Admin > User Management
2. From the Users list view, open the user record that you would like to edit
3. From the user's detail view, click on the "Access" tab



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"



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

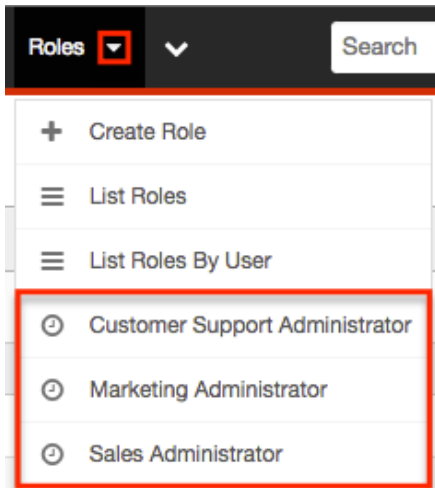
The Roles list view displays all role records meeting the current search criteria. To access the list view, simply navigate Admin > Role Management. Alternately, if you are looking at a role's detail view, you can click the Roles module tab to return to the list view. You can click the role's name to 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.

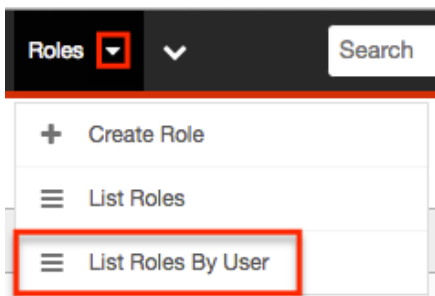
Viewing Via Recently Viewed

As you access different roles, Sugar will keep track of which roles you have recently viewed. Click the triangle in the [Roles module tab](#) to see a list of the 3 roles you most recently viewed in the module. Clicking the role's name within the list will open it in detail view.



Viewing Roles by User

Role Management offers the option to view all roles assigned to specific users. Click the triangle in the Roles module tab and select "List Roles By User" to view these roles.



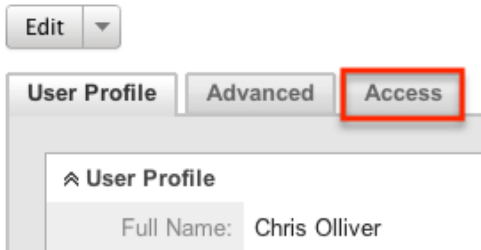
You will be redirected to the [Users](#) module and a screen will appear with a dropdown list with all users' names included. Select the user you would like to view and a chart will show which is a compilation of all of the roles listed for the user in the Roles subpanel, at the bottom of the page.



| | Access | Access Type | Delete | Edit |
|-------------|---------|-------------------|--------|------|
| Accounts | Enabled | Admin & Developer | All | All |
| Bug Tracker | Enabled | Admin & Developer | All | All |
| Calls | Enabled | Normal | All | All |

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

The screenshot shows the 'Access' tab selected. Below the tabs, there is a table with a red border. The table has five columns: 'Access', 'Access Type', 'Delete', and 'Edit'. The first column is unlabeled but contains the module names. The table data is as follows:

| | 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

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.

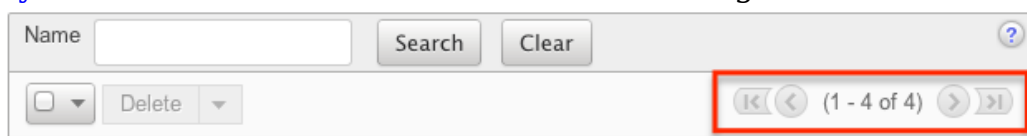
Roles List View

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.

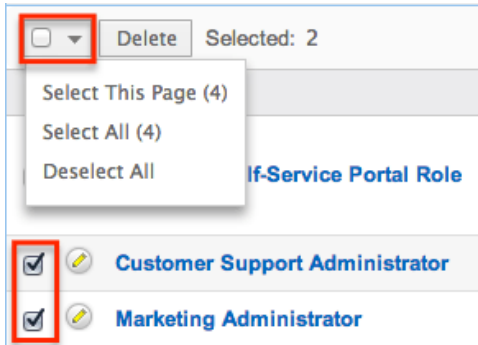
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via the System menu in Admin. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.



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:

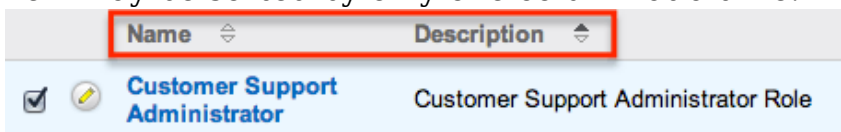
- Select This Page : Selects all records shown on the current page of results
- Select All : Selects all records in the current search results across all pages of results
- Deselect All : Deselects all records that are currently selected



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.

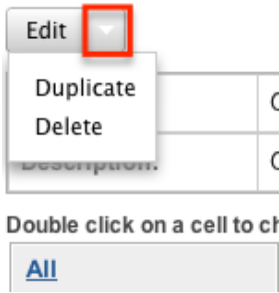


Roles Detail View

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.

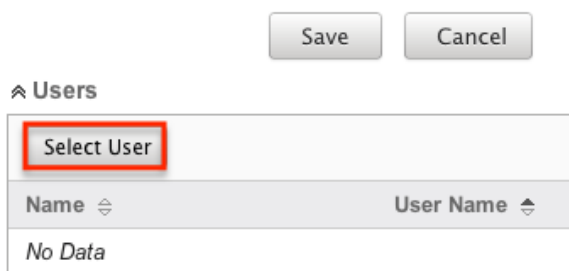
Field Permissions

| | | | | | | | |
|-------------------------------|---------|------------------------------------|---------|--------------------------------------|---------|------------------------------------|---------|
| 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 |

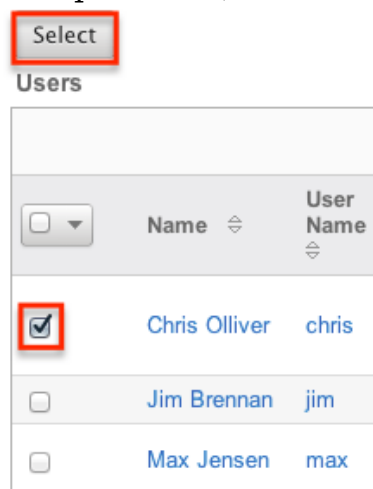
Users Subpanel

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 users 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.



3. 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".



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.

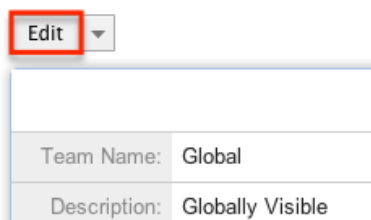
Editing Roles

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.

Teams: Global

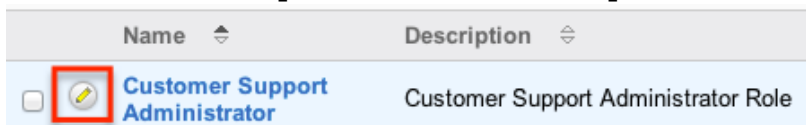


The screenshot shows a user interface for editing a role. At the top left, there is a button labeled "Edit" with a downward arrow, highlighted with a red box. Below this button is a form with two fields: "Team Name: Global" and "Description: Globally Visible".

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.



The screenshot shows a list view of roles. The table has two columns: "Name" and "Description". The first row is highlighted in light blue and contains the role "Customer Support Administrator" with the description "Customer Support Administrator Role". A pencil icon is visible to the left of the role name, highlighted with a red box.

| Name | Description |
|--------------------------------|-------------------------------------|
| Customer Support Administrator | Customer Support Administrator Role |

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.

^ Roles



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

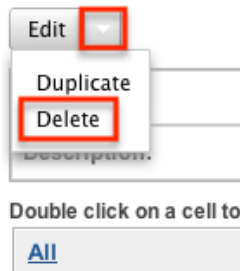
Deleting Roles

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.

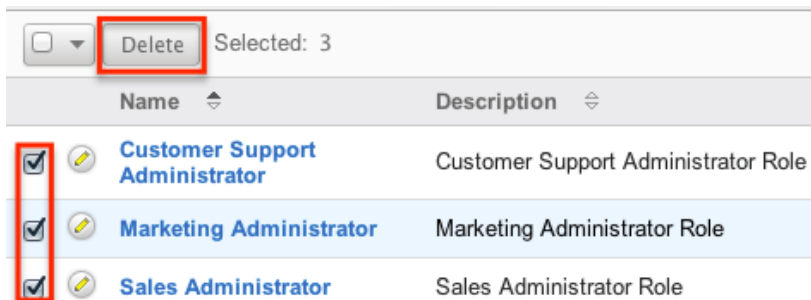


3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

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: 01/25/2017 11:31am

Password Management

Overview

Password Management is used to administer requirements 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"/> |
| ⌵ Hide Advanced Options | |
| Regex Requirement: ⓘ <input type="text"/> | 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 necessary, or click "None" for the password to never expire. Once the temporary password expires, users will see a message upon login, informing them that the password has expired and to create a new password. The user will need to enter the temporary password along with the new password and confirm the password as well.

System-Generated Passwords

Enable System-Generated Passwords Feature : [i](#)

Warning: An SMTP server for outbound emails is not configured in Email Settings. It must be configured in order to send passwords to users. A primary email address is required for each user in order to use this feature.

System-Generated Password Expiration

None
 Password Expires in
 Password Expires upon 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](#)

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.

[^ Forgot Password?](#)

User Name:

Email Address:

Enter the Two Words Below:

which *I VENGED*

Get another CAPTCHA Switch to Sound

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:

Public Key* 6LfYwt4SAAAAAL9n5HszJa2R1XdSPkUh97TJPC Private Key* 6LfYwt4SAAAAABOaGTjJ0a8TT

Honeypot Validations

Honeypots are a non-intrusive method of human form submission confirmation that is more effective than traditional CAPTCHA. Enabling the honeypot validation option will add an invisible input field to the Forgot Password form which only bots reading the HTML will be able to see. When the bots fill in the honeypot field, Sugar knows to disregard the submission since it was not created by a human, thus preventing unauthorized access to your Sugar instance.

Enable reCAPTCHA Validations :

Enable Honeypot Validations:

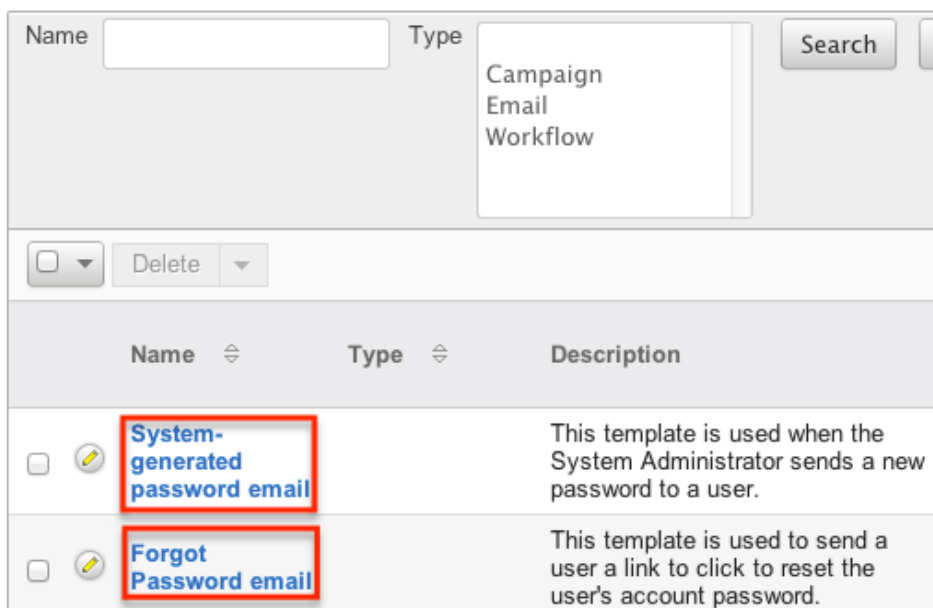
Email Templates

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 appropriate 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.



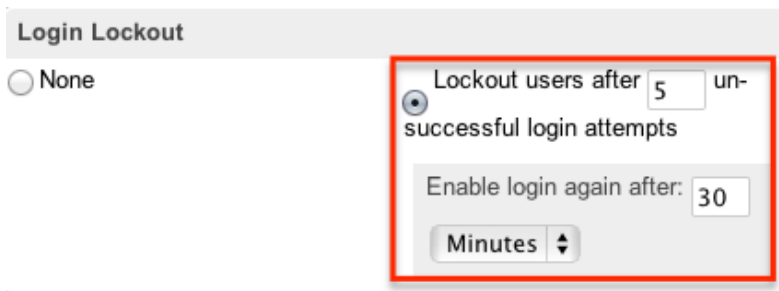
User-Generated Password Expiration

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. Once the password expiration is reached, users will see a message upon login, informing them that their password has expired and to create a new password. The user will need to enter their current password along with their new password and confirm the password as well.

The screenshot shows a configuration form titled 'User-Generated Password Expiration'. It has three radio buttons: 'None', 'Password Expires in', and 'Password Expires upon'. The 'Password Expires in' radio button is selected. Next to it is a text input field containing '60' and a dropdown menu showing 'day(s)'. The 'Password Expires upon' radio button is unselected, and next to it is an empty text input field followed by the word 'logins'.

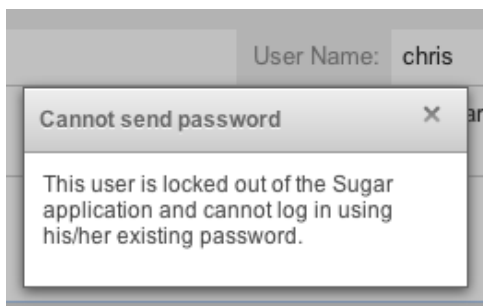
Login Lockout

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 amount of attempts and define the timeframe.



The screenshot shows the "Login Lockout" configuration panel. It features a radio button labeled "None" which is currently unselected. A second radio button is selected, and its associated configuration is highlighted with a red rectangular box. This configuration includes a text input field for "Lockout users after" with the value "5", followed by the text "un-successful login attempts". Below this is another text input field for "Enable login again after:" with the value "30". At the bottom of the highlighted area is a dropdown menu currently set to "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 in to account when External Authentication is active.

LDAP Support
Enable LDAP Authentication

SAML Authentication
Enable SAML Authentication

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

| | |
|---|---------------------------------------|
| Server: <input type="text"/> | Port Number: <input type="text"/> |
| User DN: <input type="text"/> | User Filter: <input type="text"/> |
| Bind Attribute: <input type="text"/> | Login Attribute: <input type="text"/> |
| Group Membership: <input type="checkbox"/> | |
| Authentication: <input type="checkbox"/> | |
| Auto Create Users: <input type="checkbox"/> | |
| Encryption Key: <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 | <p>Check this box to enable the User Name and Password fields.</p> <p>Enter " username@MYSERVER.MYDOMAIN.com" or "domain\\userfirstname.userlastname" 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 | <p>A case-sensitive value, enter userPrincipalName for Active Directory.</p> |
| Enable LDAP Authentication | <p>Uncheck this box if you would like to disable LDAP in your instance.</p> |

| | |
|------------------|--|
| 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 name For example: ou=groups, dc=example, dc=com • Group Name : Enter the group name For example: cn=sugarcrm • User Attribute : A unique identifier used to check if the user is a member of the group For example: uid • Group Attribute : The attribute of the group that will be used to filter against the User Attribute For example: MemberUid |
| 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 | Enter any additional parameters to apply when authenticating users. |

For example: is_user_id=1

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 supports the use of SAML versions 1.1 and 2.0.

To configure SAML, 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.

The screenshot shows the SAML Authentication configuration interface. It includes a title bar 'SAML Authentication', a checkbox for 'Enable SAML Authentication' (checked), and three input fields: 'Login URL', 'SLO URL', and 'X509 Certificate'. The 'X509 Certificate' field is a large text area. At the bottom are 'Save' and 'Cancel' buttons.

Fill in the appropriate options in the following fields, and then click "Save" to commit the changes.

- 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.
- SLO URL : Enter the Single Logout URL.
- X509 Certificate : Enter the SAML X509 certificate public key.

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

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 12:16pm

User Management

Overview

The User Management module provides administrators access to create, edit, activate, and deactivate the profiles of all the users in their Sugar instance. 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 system administrator by default. The system administrator can 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 four types of users in Sugar: Regular User, System Administrator, Group User, and Portal API User. Each user type has different functions and uses in Sugar which 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 and Portal API Users never count against the number of Sugar licenses 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 in case the original admin is 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 non-specific user (e.g. Sales, Support) in the organization. Unlike a Regular or System Administrator user, a Group user does not have access to log in to Sugar. Due to this, they do not have the same profile settings available, including the option to set a password. Since Group users cannot log in to Sugar, they 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 delegated to specific users (e.g., John Smith) in the organization.

Please note that Group users will not appear in the [Employees](#) module. For more information on how to create a Group user, please review the [Group Users](#) section of this documentation.

Portal API User

A Portal API User is similar to a Group User except that it is created specifically to communicate with the Sugar server using the Sugar Portal SOAP API functionality. It is intended only for use with Sugar Portal and is enabled when the Sugar Portal is enabled via Admin > Sugar Portal. It must remain enabled in order for portal users to authenticate. Using legacy Sugar Portal (an external application) also requires the enablement of this user. This user can only be used to authenticate contact credentials against SOAP V1 portal API methods in Enterprise and Ultimate editions. To create a Portal API user, please review the [Portal API Users](#) section of this documentation.

Portal API Users will not appear in the [Employees](#) module and are not counted in the user license agreement. More information about the Sugar Portal can be found in the Sugar Portal documentation. Sugar's API documentation can be found in the Web Services section of the Developer guide.

Note: The Portal API user is not intended to be a free API user for external integrations and has very limited functionality through the SOAP API.

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 User 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 |
| Avatar | 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 |
| 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) Note: The Employee Status and Status fields are managed separately, so consider choosing a new employee status when the Status field 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 |

| | |
|---------------|---|
| Reports to | <p>Use this field to select this users 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.</p> <p>Note: The Employee Status and Status fields are managed separately, so consider choosing a new employee status when the Status field changes.</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 | This is where the admin can decide to grant a regular user System Administrator access to Sugar |

| | |
|------------|--|
| | Note: This field is not editable in studio |
| 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 |
| System 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 |

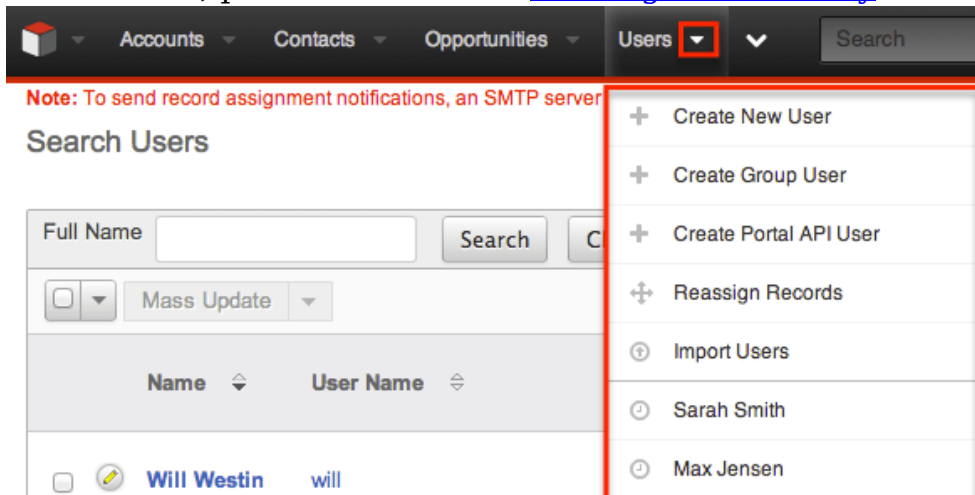
| | |
|-----------------------------|---|
| iCal integration URL | URL in which someone can subscribe to the user's Sugar calendar within iCal or other programs that support iCal integrations |
| Import/Export Character Set | The default character set used for imports, exports, and vCard generation for this user |
| Main Font Size | The default font size in the PDF header when generated by this user |
| Name Display Format | How concatenated name fields will appear for the user, with the ability to control first name, last name, and salutation formatting |
| 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> |
| Preferred Currency | Select the user's default currency, with additional currencies able to be defined in Admin > Currencies |
| 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</p> |

| | |
|-----------------------------------|--|
| | <p>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 column 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 |
| Show Preferred Currency | Mark the checkbox to convert the base currency to user preferred currency in list views and record views |
| 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 | <p>Select the local time zone for this user based on geographical location</p> <p>Note: This Time Zone setting only applies to modules using the Legacy user interface. Modules using the Sidecar user interface will utilize the browser's time zone.</p> |
| User Wizard Prompt | Mark the checkbox to have users go through the New User Wizard upon their first login |

Users Module Tab

Administrators can access the Users module tab via Admin > User Management. Click the triangle in the Users module tab to open 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 |
| Create Portal API User | Opens the edit view layout to create a new Portal API User |
| 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 various 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 users in Sugar including via the Users module, duplication, and import. The edit view layout opens when creating the user directly from the Users menu and includes all of the relevant fields to create a

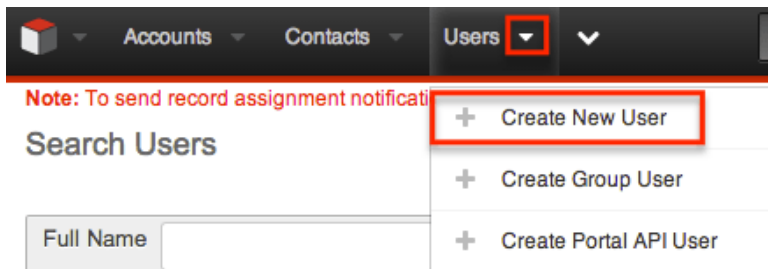
new user. The fields and options on the Create page will vary depending on the [type of user](#) you are creating.

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.

Use the following steps to create a new user:

1. Navigate to Admin > User Management.
2. Click the triangle in the Users module tab to open the Actions menu and select "Create New User".



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.

| Email Address: * | + | 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: *i* Sugar Email Client

o The Advanced tab includes preference-type settings (User Settings, Layout Options, Locale Settings, PDF Settings, Calendar Options) for the user. These are all specific to the user's account and will not affect system-wide settings or other users. Options such as notify on assignment, date and time formats, time zone, preferred currency, etc. are available to configure under this tab.

4. If the system-generated password feature is not enabled in [Password Management](#), a Password tab will appear to the right of the User Profile tab. The administrator can manually enter a password for the user under this tab and provide it to the user. Please note that the password requirements listed on the right will be checked off as the new password meets the required conditions.

User Profile **Password** Advanced External Accounts

Password

New Password

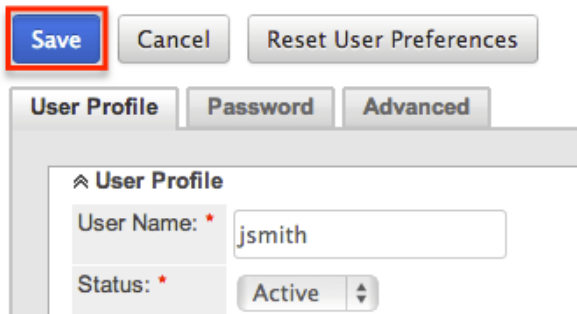
Confirm Password

- ✗ Must contain one upper case letter (A-Z)
- ✗ Must contain one lower case letter (a-z)
- ✗ Must contain one number (0-9)
- ✗ Minimum Length =6

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

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

Create



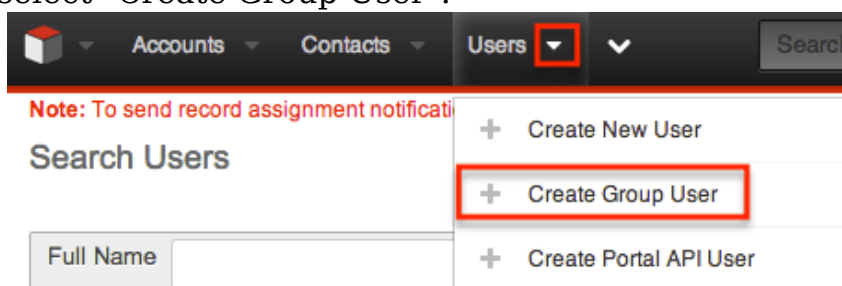
Upon saving, an email will be sent to the user with the user's system generated password (if applicable) and a corresponding Employee record will be created for the user. Once the user is created, the administrator can assign [Teams](#) and [Roles](#) to the user via the [Access](#) tab.

Group Users

A Group user cannot log in to Sugar, but new and existing records can be assigned to the Group user. The Create page for the Group user consists of the User Name, Status, Name, User Type, and Email Address fields. For more information on how to use Group users in Sugar, please review the [Group User](#) section of this documentation.

Use the following steps to create a Group user:

1. Click the triangle in the Users module tab to open the Actions menu and select "Create Group User".



2. Enter a name and user name (e.g. Support) for this user.
3. In the Email Settings section, enter an email address or addresses for the Group user. The group user's primary email address will be marked as "Primary" and you can also mark "Reply-to" if any automatic notifications from Sugar will be sent to this address.
Note: If your organization has a group inbox or alias for a team represented by the group inbox, the email address can be added here for all notifications to be sent to the entire team.
4. Click "Save" to create the user.

Create

Save Cancel Reset User Preferences * Indicates required 1

User Profile

User Profile

User Name: * Support

Status: * Active

Name: * Support

User Type: Group User

Use for assigning items to a group (example: for Inbound Email). This type cannot login through the Sugar web interface.

Email Settings

Email Address: + Primary Reply-to

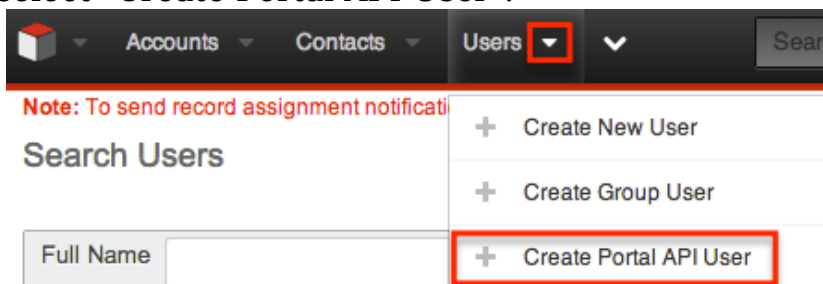
support@example.com -

Portal API Users

A Portal API user cannot log into Sugar via the web interface, 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 Portal API user creation screen only contains five fields. For more information on the use of the Portal API user, please review the [Portal API User](#) section of this documentation.

Use the following steps to create a Portal API user:

1. Click the triangle in the Users module tab to open the Actions menu and select "Create Portal API User".



2. Enter a name and user name for the user.
3. In the Email Settings section, enter an email address or addresses for the API user. The group user's primary email address will be marked as "Primary" and you can also mark "Reply-to" if any automatic notifications from Sugar will be sent to this address.
4. On the Password tab, enter and confirm a password for the user following the password requirements set in Admin > [Password Management](#). This password

will be used to log in through the API for this user.

5. Click "Save" to create the user.

Create

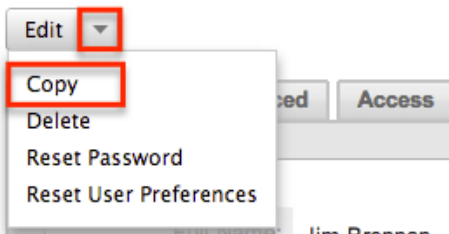
The screenshot shows the 'Create' user interface. At the top, there are buttons for 'Save', 'Cancel', and 'Reset User Preferences'. The 'Save' button is highlighted with a red box. Below the buttons, there are two tabs: 'User Profile' and 'Password'. The 'User Profile' tab is selected and highlighted with a red box. The form contains several fields: 'User Name' (required, value: API), 'Status' (required, value: Active), 'Name' (required, value: API User), and 'User Type' (value: Portal API User). Below these is the 'Email Settings' section, which includes an 'Email Address' field with the value 'api@example.com' and a '+' button highlighted with a red box. There are also 'Primary' and 'Reply-to' radio buttons. A note at the bottom right of the form states: 'Use for the Portal API. This type cannot login through the Sugar web interface.' A legend indicates that an asterisk (*) denotes a required field.

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, etc. For situations such as these, one user can be configured and additional users can be quickly set up using the Copy option 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 password fields.

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

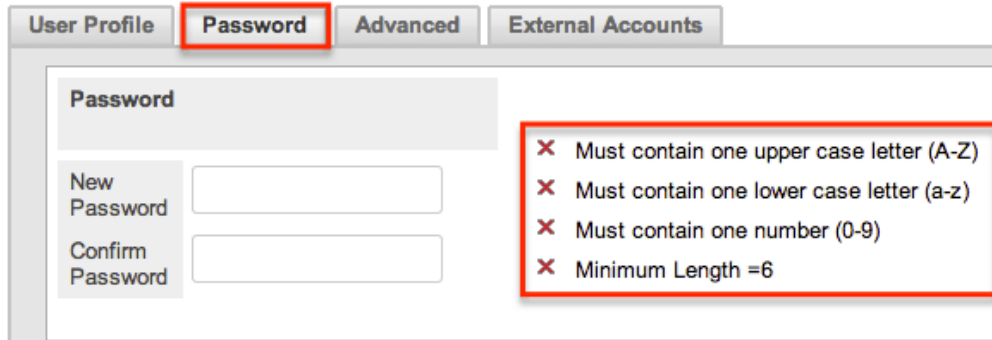
1. Navigate to the detail view of the user you would like to duplicate.
2. Click the Actions menu and select "Copy".



3. The displayed edit view is pre-populated with the original user's values, except for the user name and password.
4. Populate the "User Name" for the new user and edit any other 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](#), a Password tab will appear to the right of the User Profile tab where administrators can manually create a password for the user. Please note that the password requirements listed on the right will be checked off as the new password meets the required conditions.



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

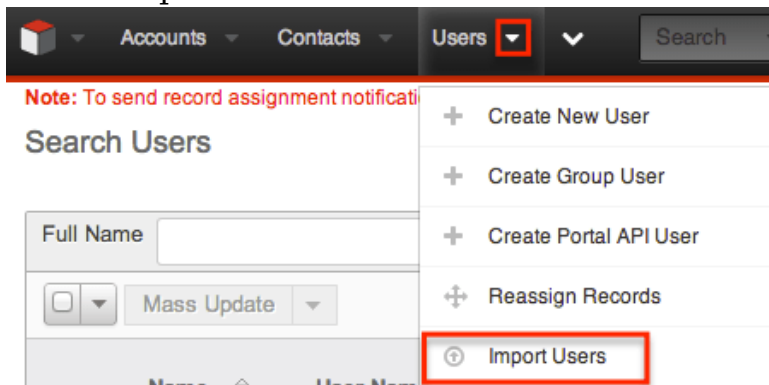
6. Click "Save".

The new user is now created and available for use. This process is applicable for all [user types](#).

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. Click the triangle in the Users module tab to open the Actions menu and select "Import Users".



2. In Step 1, select the source of the data you are importing. Click "Next".

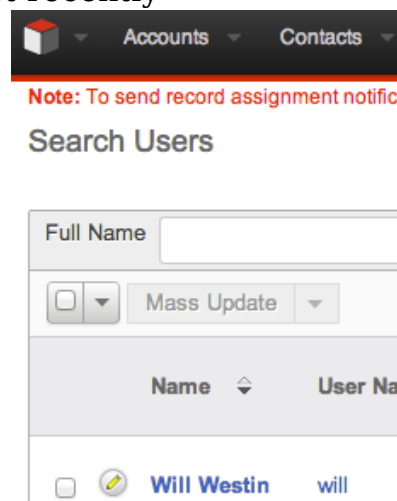
-
3. In Step 2, select the import file and choose "Create new records only". Click "Next".
 4. In Step 3, confirm the import file properties. Click "Next".
 5. In Step 4, confirm the field mappings for the import. Click "Next".
 6. In Step 5, configure any fields you would like to use for duplicate checking.
 7. In Step 6, view the import results.
 - The Created Records tab will show all of the new user 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. Click the Actions menu in 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

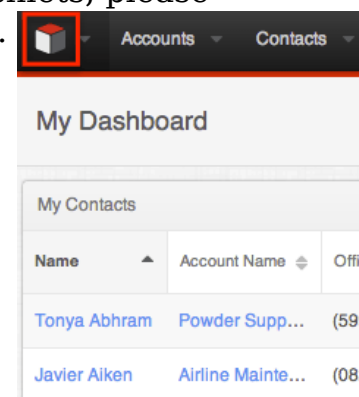
The Users list view displays all user records meeting the current search criteria. To access the list view, navigate to Admin > User Management. While the list view shows key user fields, you can click the user's name to open the record in detail view. For more information on viewing users via list view, 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 also provides the Access tab, which allows [Teams](#) and [Roles](#) to be added for the user. Any admin user can click a user record's link from anywhere in the application, including from the Users list view to access the user's detail view. For more information on viewing the user's 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 and administrators can make changes to the user's profile as necessary. For more information on using dashlets, please refer to the Dashlets section of the [Intelligence Pane](#) documentation.



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, you may either create a report based on the Users module or add links to the Users module in a report based on a module related to Users. Once the report is run, you can view the user record's detail view simply by clicking the user's name in the report results. Please note that you can only access user detail views via the 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 | Type: Rows and Columns Report |
| Modules: Users | Teams: Global |
| Display Columns: User Name, Is Administrator, Status | Assigned to: Administrator |
| Schedule: None | |
| Filters: None | |

| 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

Full Name

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 Users 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 [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 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 Users Advanced Search via Admin > Studio. For more information on editing the Advanced Search layout, please refer to the [Studio](#) documentation.

Users List View

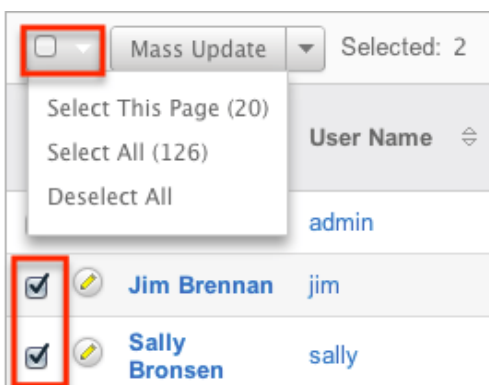
The Users list view displays all user records meeting the current search criteria. You can view the basic details of each user within the columns of fields.

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

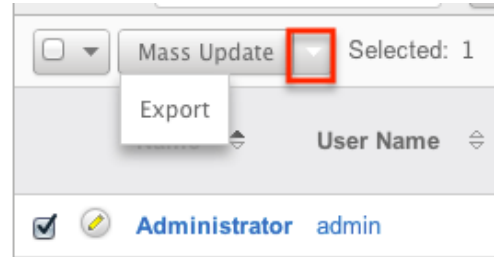
You can perform actions on user records directly from the list view by first selecting the desired records. To select individual user records on the Users list view, mark the checkbox on the left of each row. To select or de-select multiple user records on the list view, use the options in the checkbox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

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



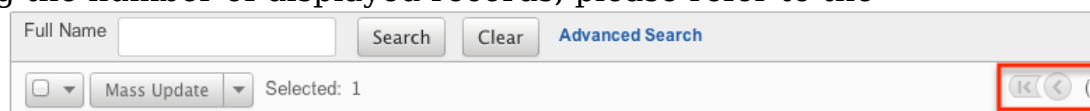
The options in the Actions menu allow you to perform the following operations:

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

| Name | User Name | Title |
|---------------|-----------|---------------|
| Administrator | admin | Administrator |

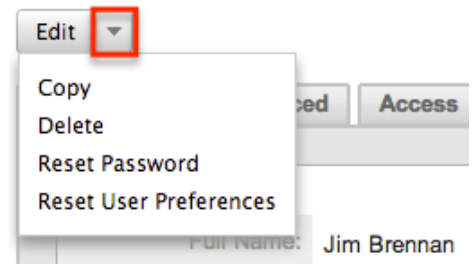
Users Detail View

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 |
| Copy | 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 |

Tabs

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

User Profile

The User Profile tab displays information specific to the user such as the user's name, user type, employment status, contact information, etc. Administrators have the ability to configure the User Profile layout via Admin > [Studio](#). For more information on editing the user's profile in the Users module, please refer to the [Editing Via Detail View](#) section of this documentation.

Advanced

The Advanced tab shows information specific to the user's preferences in Sugar. Information such as the user settings, locale settings, PDF settings, etc. can be easily viewed under this tab. Please note that the layout of this tab cannot be edited in Studio. However, you can edit the information under the tab by clicking the Edit button on the user's detail view. For more information on editing the user's profile, please refer to the [Editing Via Detail View](#) section of this documentation.

Access

The Access tab summarizes the user's Team and Role settings so that it can easily be viewed in one place. The Access table, Roles subpanel, and My Teams subpanel will appear under the tab.

- **Access Table** : The Access table summarizes the set of permissions assigned to the user and allows you to view the type of access they have along with the actions (e.g. View, Edit, Delete, etc.) they can perform in Sugar. This table is very similar to what appears in Admin > Role Management, but this table is not editable in the Users module.

Note: Users with more than one role assigned will have the more restrictive

role setting prevail on the access table. For example, if one role allows the user to delete records in the Contacts module, but the other role does not allow record deletion, the user will not be able to delete records in the Contacts module.

The table will list the modules in rows on the far left with column headers representing the type of action (e.g. Delete, Edit, Export, etc.) users can perform in each module. For more information on role settings, please refer to the [Roles](#) documentation.

| | Access | Access Type | Delete | Edit | Export | Import | List | Mass Update | View |
|----------|---------|-------------|--------|-------|--------|--------|------|-------------|------|
| Accounts | Enabled | Normal | None | Owner | None | None | All | None | All |

- **Roles Subpanel** : The Roles subpanel will list all of the roles assigned to the user along with the description of each role. 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. System administrators can easily assign roles to the user as well as remove roles via the Roles subpanel.
- **Teams Subpanel** : The Teams subpanel will list all of the teams assigned to the user along with the description of each team. The defined permissions determine 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. System administrators can easily assign teams to the user as well as remove teams via the My Teams subpanel. For more information on team settings, please refer to the [Teams](#) documentation.

Subpanels

Subpanels can be added to the Users module by creating relationships via Admin > Studio. All available subpanels will appear at the bottom of the user's detail view. For more information on adding 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.

⤴ User Holidays

| | |
|-----------------|---------------|
| Create | |
| Holiday Date: ⤴ | Description: |
| 01/01/2014 | New Years Day |

Editing Users

The user's profile can be easily edited by the user or the administrator by clicking the Edit button on the user's detail view. In addition, changes to the user's profile can be made via the Users list view as well by clicking the Pencil icon to the left of the user's name. Editing the user's profile from the detail view and list view, opens the full edit view layout which includes all of the relevant fields that can be updated as necessary.

[Will Westin](#) » Edit

The screenshot shows a user profile edit form. At the top, there are three buttons: "Save" (highlighted in blue), "Cancel", and "Reset User Preferences". Below these are four tabs: "User Profile" (highlighted with a red box), "Password", "Advanced", and "External Accounts". The form is divided into two main sections: "User Profile" and "Employee Information".

User Profile Section:

- User Name: * will
- Status: * Active
- User Type: Regular User
- Avatar: [Image of Will Westin]
- First Name: Will
- Last Name: * Westin
- Text below User Type: User can access modules and records based on team security and r

Employee Information Section:

- Employee Status: Active
- Title: Sales Manager East
- Display Employee Record: [Field]
- Work Phone: [Field]

Editing Via Detail View

You can edit users by clicking the Edit button on the upper left of the user's detail view. 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.

The screenshot shows the user detail view for Jim Brennan. At the top left, there is a button labeled "Edit" with a dropdown arrow, which is highlighted with a red box. Below the button are three tabs: "User Profile" (highlighted), "Advanced", and "Access". The "User Profile" section is expanded, showing the following fields:

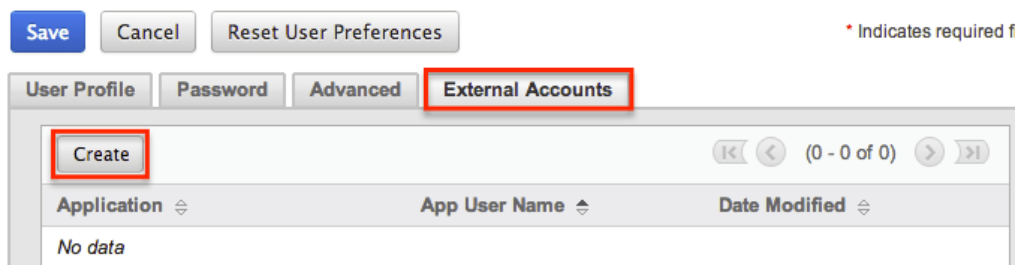
- Full Name: Jim Brennan
- Status: Active

External Accounts

When viewing the edit view of a user, the External Accounts tab appears to the right of the Advanced tab. The External Accounts functionality allows you to connect external applications to Sugar, such as GoToMeeting, Google Drive (Google Docs), and WebEx. To create an external account record, follow the following steps:

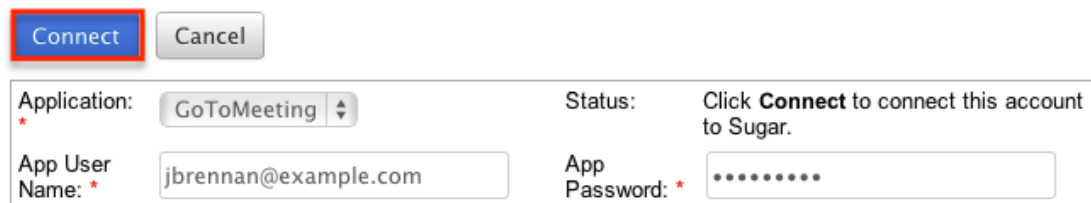
1. Navigate to the [detail view](#) of the user to whom you would like to add the account.
2. Click on the External Accounts tab then click "Create".

Jim Brennan » Edit



The screenshot shows the user edit interface for Jim Brennan. At the top, there are buttons for 'Save', 'Cancel', and 'Reset User Preferences'. A note indicates that an asterisk (*) denotes required fields. Below these are tabs for 'User Profile', 'Password', 'Advanced', and 'External Accounts', with the latter being selected and highlighted with a red box. Under the 'External Accounts' tab, there is a 'Create' button, also highlighted with a red box. To the right of the 'Create' button are navigation icons and a '(0 - 0 of 0)' indicator. Below this is a table header with columns for 'Application', 'App User Name', and 'Date Modified'. The table currently contains the text 'No data'.

3. Select the application you will be connecting to from the Application dropdown field. The fields available to complete will vary depending on the application (GoToMeeting, Google, WebEx) selected. Please note that additional external applications will appear on the list if they are enabled via Admin > Connectors.
4. Enter the necessary information for the external application and click "Connect".



The screenshot shows a 'Connect' dialog box. At the top, there are 'Connect' and 'Cancel' buttons, with 'Connect' highlighted in red. Below the buttons, there are three main sections: 'Application:' with a dropdown menu set to 'GoToMeeting', 'App User Name:' with a text input field containing 'jbreannan@example.com', and 'App Password:' with a masked password field. To the right of these fields, there is a 'Status:' section with the text 'Click **Connect** to connect this account to Sugar.'

Should you wish to prevent users from creating external accounts, you can remove

The out of the box connectors perform the following functions:

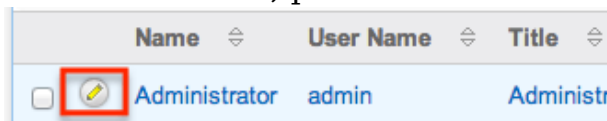
- **GoToMeeting** : The GoToMeeting connector allows you to create meetings in Sugar that are tied to your GoToMeeting account and will show as such on your GoToMeeting account. This allows the user to, after creating the Sugar meeting record, start the GoToMeeting directly from within Sugar's [Meetings](#) 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. The full edit view layout will open allowing you to make any changes to the user's profile as necessary. Once the user's profile has been updated, click "Save" to preserve the changes. For more information on the list view, please refer to the [Users List View](#) section of this documentation.



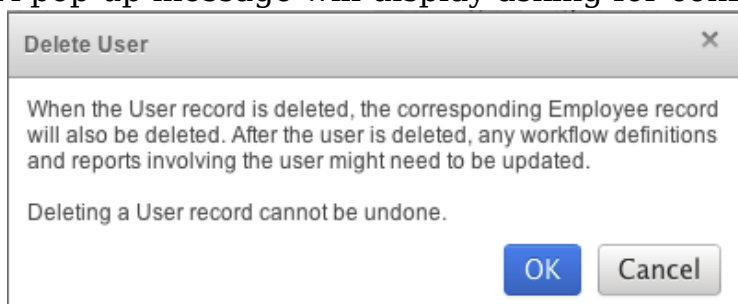
| | Name | User Name | Title |
|---|---------------|-----------|-----------|
|  | Administrator | admin | Administr |

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. Please note that deleting user records will not delete any related records and will only remove the user from appearing in any lists (e.g. Assigned to) 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 to Sugar.

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

1. Navigate to the user's detail view via Admin > User Management.
2. Select "Delete" from the [Actions Menu](#).
3. A pop-up message will display asking for confirmation. Click "OK" to proceed.

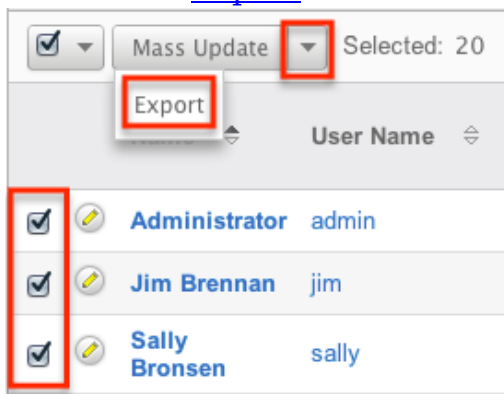


-
4. You will then be presented with the Reassign Records tool. Follow the steps on this page to complete the deletion. For more information on the Reassign Records functionality, please review the [Reassigning Records](#) section of this documentation.
 5. Once your reassignment is complete, the user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

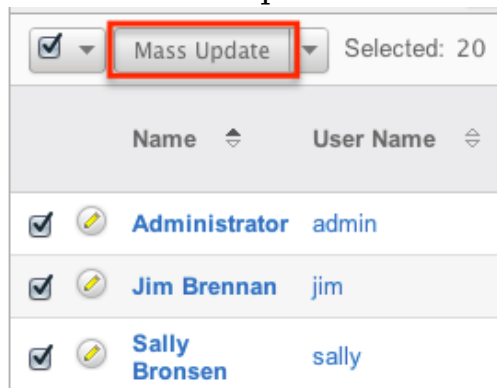
Mass Updating Users

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 via Admin > User Management.
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 user records.

Mass Update

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

Resetting User Preferences

As users make changes while navigating around Sugar, their preferences are

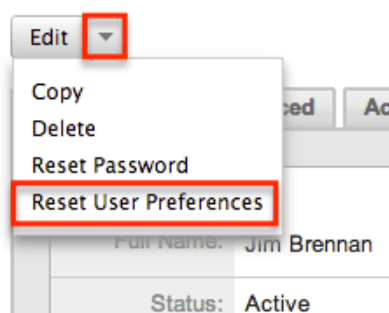
stored in the Sugar database. This includes preferences such as sort orders on list view, previous searches on both basic and advanced searches, and settings in the Advanced tab of the user profile. Users can reset their preferences back to the default out-of-the-box settings, which will revert the user's changes made in Sugar. Please note that this action cannot be undone. 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 select the user (e.g. Jim Brennan) from the list view.
2. Select "Reset User Preferences" from the [Actions menu](#).

Jim Brennan



3. A pop-up 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 necessary. 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 Password option in the 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 system-generated one. Please note that this action cannot be undone.

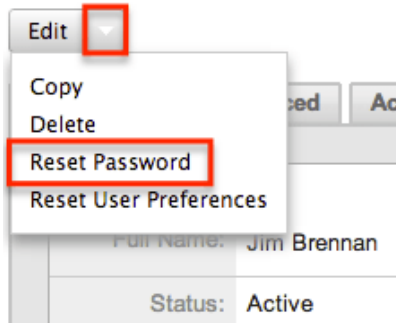
Note: If the user is currently logged in, the changes will not take effect until the

user is logged out and then back in.

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

1. Navigate to the user's detail view via Admin > User Management.
2. Select "Reset Password" from the [Actions menu](#).

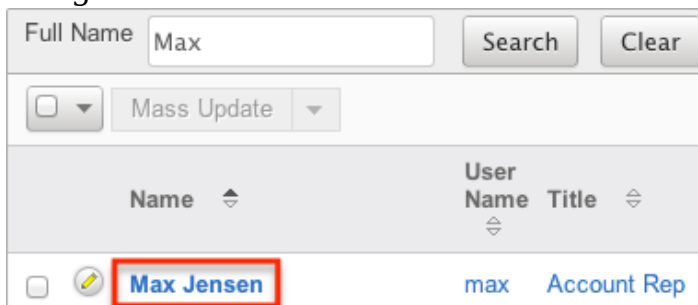
Jim Brennan



3. A pop-up 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 detail view via Admin > User Management.



2. Click the Edit button on the upper left of the detail view.

Max Jensen



3. Click the Password tab and enter the new password for the user.

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

Reassigning Records

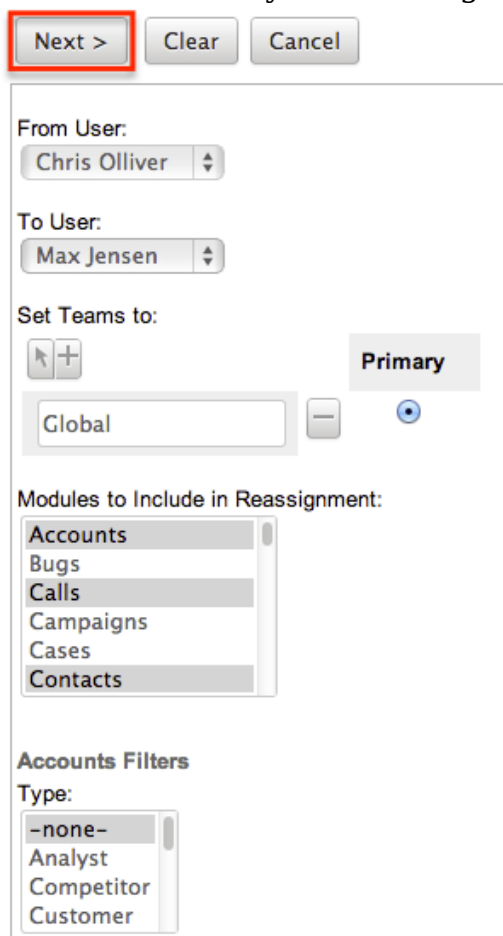
Reassign Records is a tool available in the Users module for administrators to change the Assigned To and Team fields for a specific user's records. This is best used when a user is changing departments, teams, or roles within the organization, or if the user is no longer an employee or using Sugar.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

Use the following steps to reassign records:

1. Navigate to the Users module via Admin > User Management.
2. Click the triangle in the Users module tab to open the Actions menu and select "Reassign Records".

3. Select the user to whom the records are already assigned in the From User field.
4. Select the user to whom the records will be assigned to in the To User field.
Note: You can select the same user in both fields if you are just changing the team for all of the user's records.
5. Select which team(s) the records will be assigned to in the Set Teams to field.
6. Select the module(s) you wish to include in the record reassignment. Multiple modules can be selected by holding down the Control key when using a PC or

the Command key when using a Mac.



Next > Clear Cancel

From User:
Chris Olliver

To User:
Max Jensen

Set Teams to:
Global Primary

Modules to Include in Reassignment:
Accounts
Bugs
Calls
Campaigns
Cases
Contacts

Accounts Filters
Type:
-none-
Analyst
Competitor
Customer

7. Selecting certain modules will display specific filters (e.g. Type) which can be applied to the module. Use these filters if you do not want to include all records assigned to the user.

The list of modules and their filter fields are as follows:

| Module | Filter Field |
|---------------|--------------|
| Accounts | Type |
| Bugs | 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, or have assignment notifications sent out, please click the Include Workflow/Notifications/Audit checkbox.

Note: This process performs a large set of actions at once and may take a long amount of time to complete.

| Assessing Accounts |
|---|
| 8 records from Accounts will be updated. |
| <input checked="" type="checkbox"/> Include Workflow/Notifications/Audit (significantly slower) |

| Assessing Calls |
|--|
| 6 records from Calls will be updated. |
| <input type="checkbox"/> Include Workflow/Notifications/Audit (significantly slower) |

| Assessing Contacts |
|--|
| 23 records from Contacts will be updated. |
| <input type="checkbox"/> 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: 23 affected |

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 12:03pm

Sugar Connect

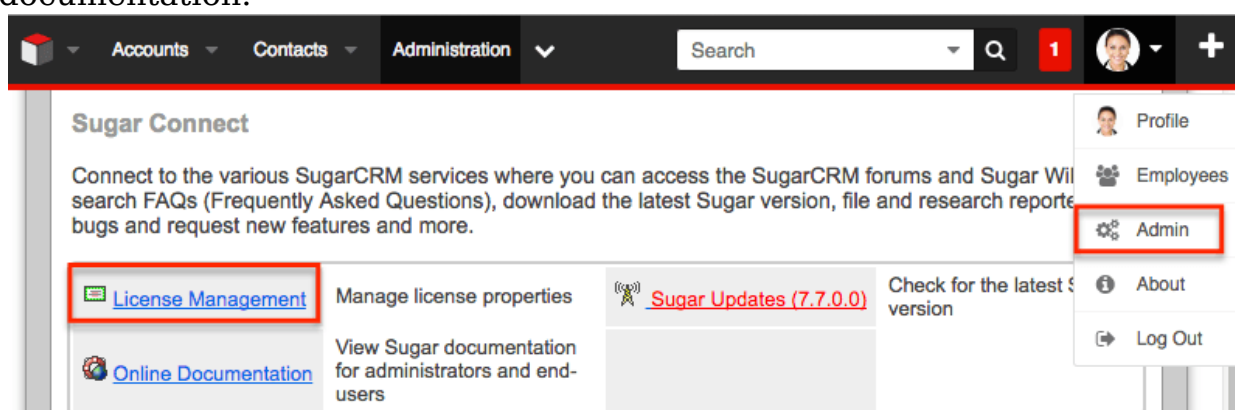
Overview

The Sugar Connect section of the Administration page allows you to connect to various SugarCRM online resources such as License Management, SugarCRM

Support, 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.

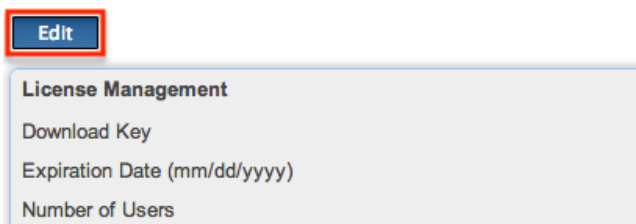
The fields in the License Management panel are as follows:

- **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 a user interface for 'License Management'. At the top left, there is a blue button with the word 'Edit' in white text, which is highlighted with a red rectangular border. Below the button is a light gray rectangular panel. Inside this panel, the title 'License Management' is displayed at the top. Below the title, there are three labels: 'Download Key', 'Expiration Date (mm/dd/yyyy)', and 'Number of Users', each followed by a corresponding input field.

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

| License Management | |
|--|-------------------------|
| Download Key | d167ef950b8234cfac178cl |
| Expiration Date | 02/26/2014 |
| Number of Users | 9999 |
| Number of Offline Client Licenses | 0 |
| Number of Concurrent Self-Service Portal Users | 100 |

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

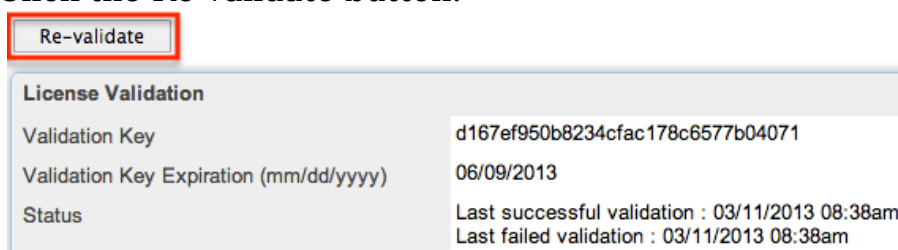
via License Management. For example, if you renew your subscription after the expiration date or if you purchase additional users mid-term, you will have to re-validate the license via Admin > License Management in order to update your Sugar account with the new subscription.

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.

| License Validation | |
|--|--|
| Validation Key | d167ef950b8234cfac178c6577b04071 |
| Validation Key Expiration (mm/dd/yyyy) | 06/09/2013 |
| Status | Last successful validation : 03/11/2013 08:38am Last failed validation : 03/11/2013 08:38am |

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".

Manual Validation

Step 1: Generate a license key information file by clicking the following button.

Then save the file (sugarkey.lic) on your local file system.

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.



Please attach your download key:

No file chosen

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".

Step 3: Transfer the validation key file (sugarvalidationkey.lic) back to the SugarCRM system. Import the validation key using this form below:

Validation Key File(sugarvalidationkey.lic) No file chosen

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.

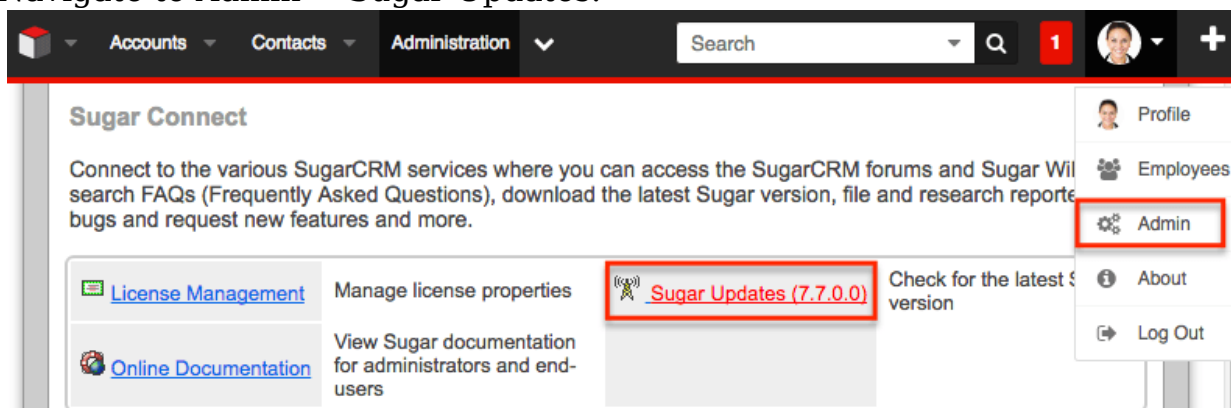
Sugar Updates

The Sugar Updates page allows administrators to check for the latest available Sugar versions. By default, Sugar automatically checks for updates on a periodic

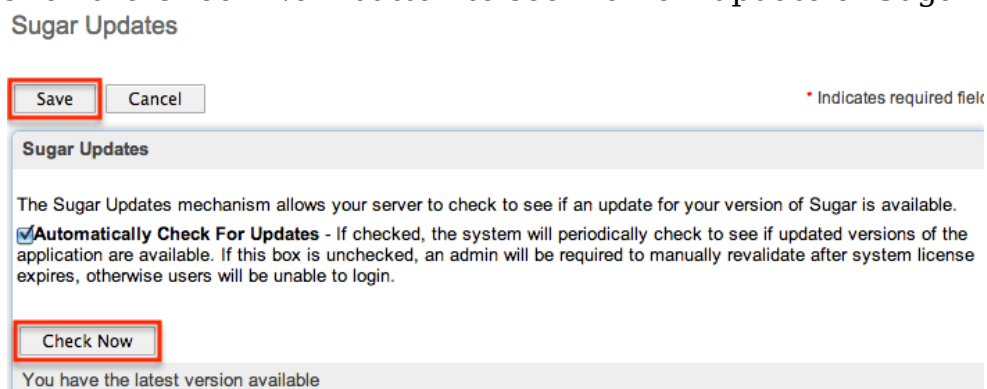
basis to see if any version updates are available for your instance. If a new version update is available, the Sugar Updates link in the Admin page will appear red and display the latest Sugar version next to it. Administrators can uncheck the automatic updates option in the Sugar Updates page if they 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.

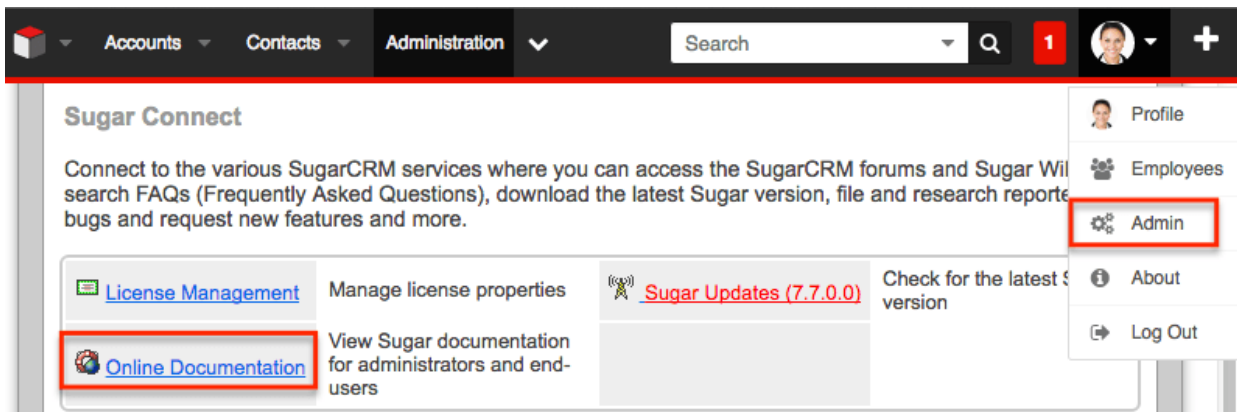


If there is an available version update, a message will appear below the Check Now button with the latest version along with a message to visit support.sugarcrm.com to retrieve and download the latest version. Please note that On-Demand clients are normally upgraded by the SugarCRM team on a predetermined 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.

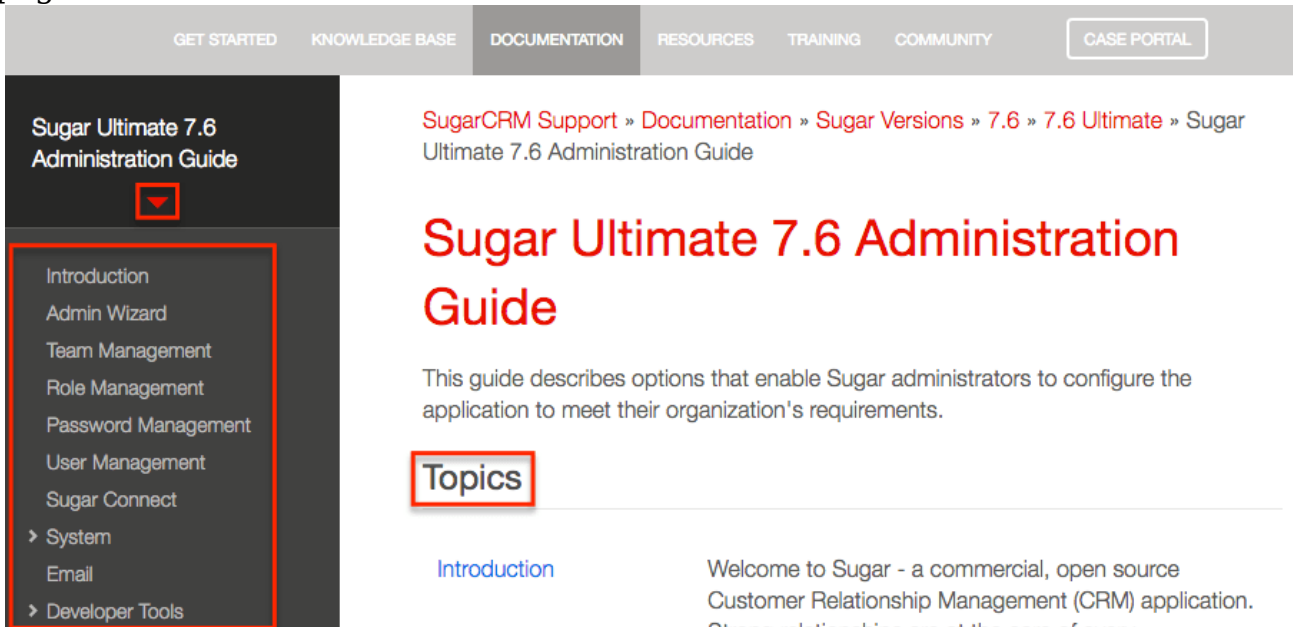
Online Documentation

Administrators can easily access the documentation for their current Sugar version

and edition via Admin > Online Documentation.



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 7.6 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.



Please note that all users can view the online documentation as well by clicking the Support link in Sugar's footer. 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 2.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



7.6 Ultimate Documentation

User Guides

[Application Guide](#)

[Portal Deployment User Guide](#)

[Portal User Guide](#)

Developer Guides

[Developer Guide 7.6](#)

[Schema 7.6.2.1](#)

Administrator Guides

[Administration Guide](#)

[Installation and Upgrade Guide](#)

[Supported Platforms](#)

Release Notes

[Release Notes 7.6.2.1](#)

[Release Notes 7.6.2.0](#)

Additional Guides

[SugarCRM Mobile for Android User Guide](#)

[SugarCRM Mobile for iOS User Guide](#)

[MS Outlook Plug-in User Guide 2.x](#)

[MS Outlook Plug-in Installation Guide 2.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 2.x](#)

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: 05/27/2016 06:36pm

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 |
| OAuth Keys | OAuth key management |
| Import Wizard | Import records easily into the system |
| Upgrade Wizard | Upload and install Sugar upgrades |
| Backups | Back-up web files for your Sugar instance |
| Repair | Check and repair Sugar |
| Diagnostic Tool | Capture system configuration for diagnostics and analysis |
| Tracker | Enable/Disable tracking |
| Scheduler | Set up scheduled events |
| PDF Manager | Manage templates for generated PDF files |
| Mobile | Select modules to appear in the Mobile applications |
| Web Logic Hooks | Configure actions to call out to code hosted outside of your Sugar instance to process specified actions. |

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 panels of related information. Change the values in any of the panels and click "Save" to preserve your changes.

System Settings

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

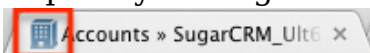
The User Interface pane consists of a group of settings that affect the interface of Sugar. Use the following settings to configure the different aspects of the interface:

- 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: Recommended setting is no more than 50 with lower values recommended when list include many fields.
- 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.

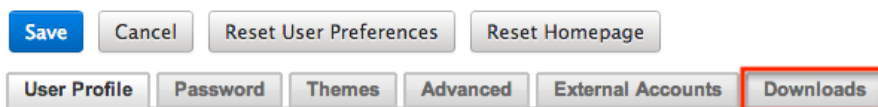


- System Name : The name of this instance of Sugar. Displays in the browser's title bar.A screenshot of a browser title bar. It shows a small red cube icon followed by the text "Home » My Company CRM" and a close button (an 'x' in a square).
- Current Logo : The current logo being used in the bottom 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.
- Collapse all subpanels and disable sticky feature : Select this option to collapse all subpanels in the record view by default and disable automatically expanding previously-expanded subpanels in order to improve performance. Once enabled, users wishing to view subpanel data will need to expand the subpanel each time they return to a module.
 - Note: Only applies to Sidecar modules.

- 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.
 - Note: Only applies to Legacy modules.
- 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 5.
 - Note: Recommended setting is no more than 25 with lower values recommended when subpanels include many fields.
- 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.
 - Note: Only applies to Legacy modules.
- 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.



- 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



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.

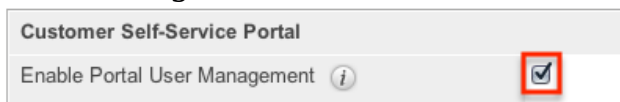
- Proxy Host : The host name or ip address of the proxy server to use.
- Port : The communication port of the proxy server.
- Authentication? : Select this option if the proxy server requires authentication and to reveal the following fields.
- User Name : The user name to authenticate to the proxy server.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



The image shows a 'Proxy Settings' form. At the top, there is a checkbox labeled 'Use proxy server?' which is checked and highlighted with a red square. Below this, there are two input fields: 'Proxy Host*' containing 'myproxy.mysite.com' and 'Port*' containing '8080'. Underneath, there is a checkbox for 'Authentication?' which is also checked. At the bottom, there are two more input fields: 'User Name*' containing 'myusername' and 'Password*' which is masked with dots.

Customer Self-Service Portal

The Customer Self-Service Portal comes with Enterprise and Ultimate versions of Sugar and provides an external-facing website for your customers to view Cases, Bugs, Knowledge Base articles and other data in Sugar. Select the Enable Portal User Management checkbox to enable the portal.

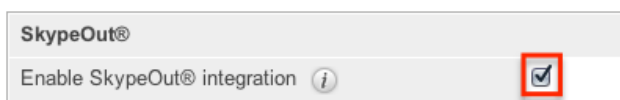


The image shows a 'Customer Self-Service Portal' settings section. It contains a checkbox labeled 'Enable Portal User Management' which is checked and highlighted with a red square.

This setting can also be enabled or disabled via Admin > Sugar Portal. For more information on the Customer Self-Service Portal, please refer to the [Portal User Guide](#).

SkypeOut

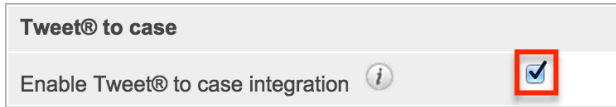
SkypeOut takes any stock or custom field that has a type of Phone and makes it a link that launches Skype to call the phone number. The phone number must be formatted properly to use this feature. It must be "+" "The Country Code" "The Number" (e.g., +1 (555) 555-1234). Select "Enable SkypeOut integration"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



The image shows a 'SkypeOut®' settings section. It contains a checkbox labeled 'Enable SkypeOut® integration' which is checked and highlighted with a red square.

Tweet to Case

The Tweet-to-Case feature allows users to create cases directly from incoming tweets within the Twitter dashlet. Select the Enable Tweet to case integration checkbox to enable this feature. For more information on using the feature, please refer to the [Creating Via Twitter Dashlet](#) section of the Cases documentation.



Note: The Twitter connector must already be set up prior to enabling this feature. For more information on how to configure the Twitter connector, please refer to the [Connectors](#) section of this documentation.

Advanced

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

- **Validate user IP address** : Select this option to validate user's IP address while accessing Sugar. If the IP address of a user changes in mid-session, Sugar will log them out and force them to log back in for security reasons. Note: Some high availability systems, VPNs, and switching Wi-Fi and wired connections may change IP addresses and thus cause your users to be logged out when they have not changed their configuration.
- **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, you 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. Please note that the file upload size is also dependent on the php.ini `upload_max_filesize` and `post_max_size` directives.
- **Portal Session Timeout** : The maximum time in seconds of inactivity for a Sugar Portal session. The session will time out and the customer will be logged out when the time limit is reached with no activity.
 - This value is only used for legacy versions of Sugar Portal available in 6.5 and older.
- **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 (including the header row) 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.
 - Prevent name changes by users to update their Private Team Name : Select this option if private team names may be different from the user's first and last name. By default, Sugar will update a private team name to [Firstname Lastname] any time the corresponding user's profile is edited and re-saved, even if the change was not made to the user's first or last name. Enable this option to ensure that edited private team names do not revert to the system default.

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 inherit 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

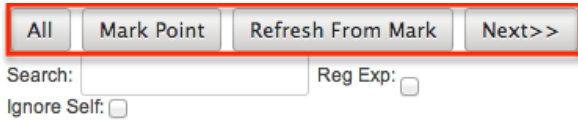
The Sugar log is stored in the root directory of Sugar and is accessible from the operating system. Administrators who do not have access to the operating system running Sugar do have the ability to view the log through Sugar. Select "View Log" from the System Settings screen.

| Logger Settings | |
|--------------------------|---------------------------------------|
| Log File Name | <input type="text" value="sugarcrm"/> |
| Maximum log size | <input type="text" value="10MB"/> |
| Log Level | <input type="text" value="Fatal"/> |
| View Log | |

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

- **All** : View the entire log

-
- Mark Point : Mark a starting point in the current log file
 - Refresh From Mark : View any entries made in the log after the most recent mark
 - Next : View new entries in the current log file



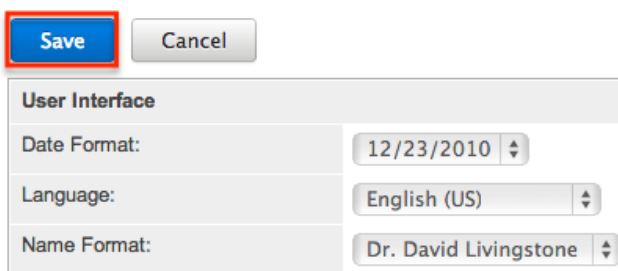
A common method for utilizing these options to debug a problem would be to click "Mark Point", perform the action causing problems, and then select "Refresh From Mark" to see any log entries caused by the action being debugged.

The log file also supports keyword searches. 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 any of the panels and click "Save" to preserve your changes.

Locale



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"/> | 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"/> | 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.

Updating Conversion Rates

Users may use the currencies defined in Admin > Currencies when populating any currency amount field in stock or custom modules. When doing so, the exchange rate for the selected currency is stored on the record itself. The conversion rate stored on each record will update to match the current rate specified in Admin > Currencies under the following scenarios:

- The record undergoes a save event (e.g., mass update, manual save, etc.) and

the record's currency has a different conversion rate defined in Admin > Currencies than is currently saved in the opportunity.

- An administrator updates the currency exchange rate under Admin > Currencies. This will trigger a scheduled job which updates all records saved with that currency to the new rate.

To keep amounts relevant to closed business historically accurate, opportunity and quote records will not update if they are in a closed status. For more information about updating opportunity currency rates, please refer to the [Opportunities](#) documentation in the application guide. For more information about updating quote currency rates, please refer to the [Quotes](#) documentation in the application guide.

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 | |
| Εσπαñολ | |
| Français | |
| עברית | |
| Magyar | |
| Italiano | |
| Lietuvių | |

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

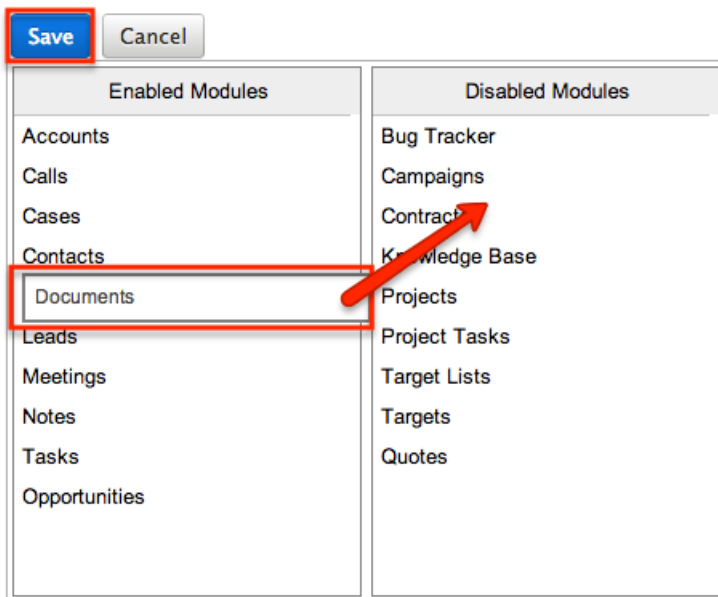
Search

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.

Please note that only modules enabled for Full-Text Search can be referenced in user posts on the activity stream. For more information on referencing record's in posts, please refer to the [Activity Stream](#) documentation in the Application guide.

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;
```

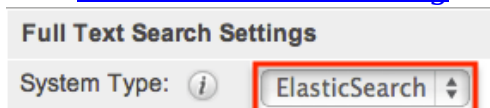
Activating Full-Text Search

Beginning with version 6.5.0 of Sugar, global search is 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. Please note that ElasticSearch is required to be set up when installing Sugar for on-site instances and it is automatically enabled by default for on-demand instances.

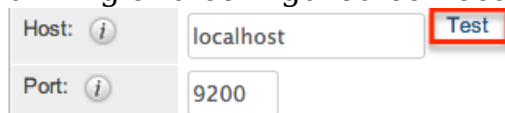
Use the following steps to configure full-text search via Admin > Search:

1. The ElasticSearch server is selected by default for the System Type field.
 - For more information on ElasticSearch, please refer to www.elasticsearch.org.



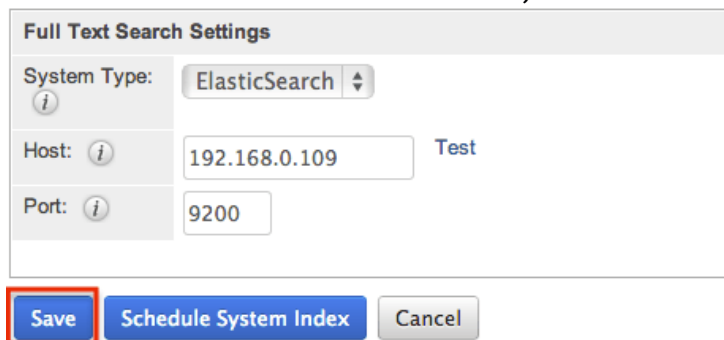
The screenshot shows the 'Full Text Search Settings' dialog box. The 'System Type' dropdown menu is set to 'ElasticSearch', which is highlighted with a red rectangular box.

2. Enter the host name or IP address of the full-text search engine. Defaults to "localhost" assuming you are running the search engine on the same server as Sugar.
3. Enter the port number for Sugar to connect to the search engine. Defaults to 9200, which is ElasticSearch's default.
4. Click "Test" to verify the settings entered and to ensure the search engine is running and configured correctly.



The screenshot shows the 'Full Text Search Settings' dialog box with the 'Host' field set to 'localhost' and the 'Port' field set to '9200'. A red box highlights the 'Test' button next to the host field.

5. A popup message will confirm if the connection was successful or not.
6. If the connection was successful, click "Save" to preserve your changes.



The screenshot shows the 'Full Text Search Settings' dialog box with the 'System Type' set to 'ElasticSearch', 'Host' set to '192.168.0.109', and 'Port' set to '9200'. A red box highlights the 'Save' button at the bottom left.

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.

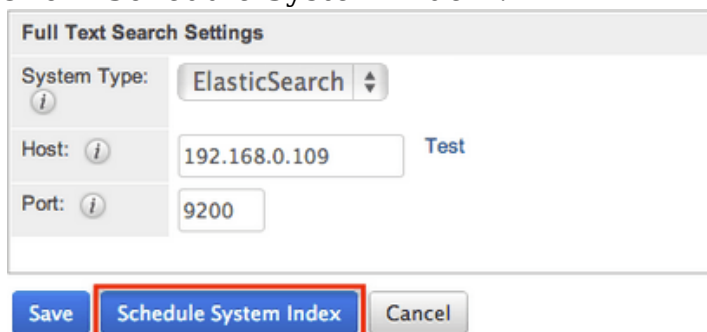
Indexing Full-Text Search

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.

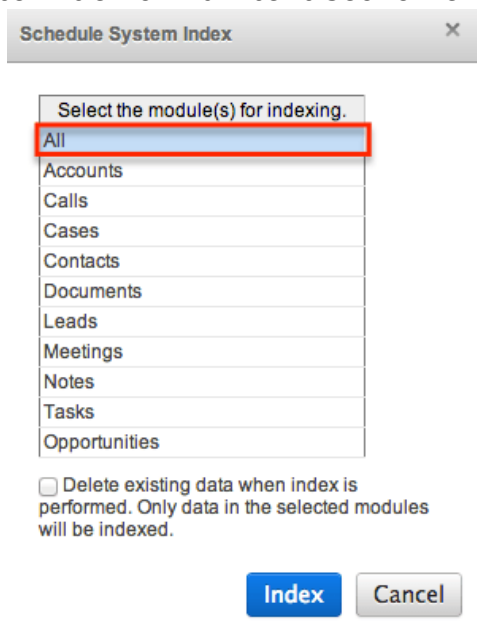
Use the following steps to perform a full system index:

1. Click "Schedule System Index".



The image shows a dialog box titled "Full Text Search Settings". It contains three input fields: "System Type" with a dropdown menu set to "ElasticSearch", "Host" with a text box containing "192.168.0.109" and a "Test" button, and "Port" with a text box containing "9200". At the bottom, there are three buttons: "Save", "Schedule System Index" (highlighted with a red box), and "Cancel".

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.



The image shows a dialog box titled "Schedule System Index". It has a close button (X) in the top right corner. Below the title bar is a text box with the prompt "Select the module(s) for indexing." Below this is a list of modules: "All", "Accounts", "Calls", "Cases", "Contacts", "Documents", "Leads", "Meetings", "Notes", "Tasks", and "Opportunities". The "All" option is highlighted with a red box. At the bottom, there is a checkbox labeled "Delete existing data when index is performed. Only data in the selected modules will be indexed." and two buttons: "Index" and "Cancel".

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

The connector settings page allows administrators to configure and manage the various types of connectors to external data sources which integrate with Sugar. A number of different connectors (e.g., Twitter, Citrix GoToMeetings, etc.) come out-of-the-box with Sugar and are enabled by default to allow users to easily view external data via their instance.

Please note that connectors can be disabled and configured accordingly via Admin > Connectors. Developers in your organization can also create connectors to other data sources, which can be uploaded via Module Loader. For more information on how to upload and install packages in Sugar, please refer to the [Module Loader](#) documentation. You can also search for other available connectors via Sugar Forge (<http://www.sugarforge.org>) and Sugar Exchange (<http://www.sugarexchange.com>)

Connector Settings

| | | | |
|---|--|---|--|
|  | Set Connector Properties Configure the properties for each connector, including URLs and API keys. |  | 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. |
|  | Enable Connectors Select which modules are enabled for each connector. |  | Manage Connector Search Select the connector fields to use to search for data for each module. |

Setting Connector Properties

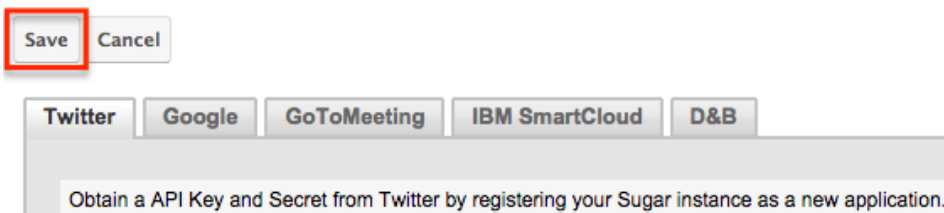
Many connectors use web services and require certain connector properties (e.g. API Key, API Secret) to be configured prior to use. To configure the connector properties, simply click the Set Connector Properties button on the Connector Settings page.



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. The tabs will include the necessary steps or link for you to obtain the information (e.g. API Key, API Secret, 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 |
|----------------|-----------------------|---|
| D&B | D&B Username | The username associated to your D&B account provided by D&B |
| | D&B Application Key | The Application Key provided by D&B |
| | D&B Environment | The D&B environment name |
| 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 |
| Twitter | API Key | The API Key provided by Twitter |
| | API Secret | The API Secret provided |

For the Twitter and D&B tabs, click the Test Connector button on the bottom left of the screen to confirm that the data source is configured correctly. Please note that Sugar's WebEx integration is configured via the External Accounts tab of the user's profile. Since WebEx does not have global properties to configure, it will not appear on the Set Connector Properties page. For more information on configuring the WebEx application, please refer to the [Getting Started](#) documentation in the Application guide.

Enabling Connectors

In order to utilize the connectors in Sugar, administrators should ensure that they are enabled properly. Please note that certain connectors are enabled for the entire application while some allow you to enable specific modules for the connector. To specify which modules are enabled for each connector, click the Enable Connectors button on the Connector Settings page.

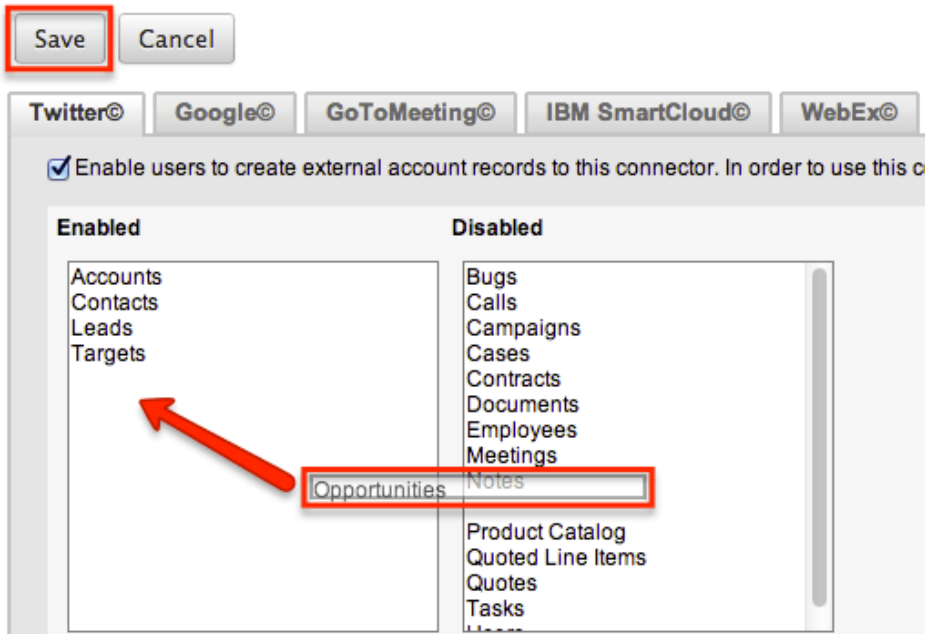


Enable Connectors
Select which modules are enabled
for each connector.

The Enable Connectors page will display a tab for each connector that is available in your Sugar instance. To enable a specific module for the connector, simply drag and drop the desired module from the Disabled column to the Enabled column. Click "Save" to preserve your changes.

Please note that you can enable the connector for any modules (e.g., Accounts, Contacts, etc.) that have a standard record view (for Sidecar modules) or detail view (for Legacy modules) layout in Sugar. For example, the Knowledge Base module does not have a record view layout, so it will not appear as an available module when configuring the Twitter connector.

Connector Settings » Enable Connectors



Mapping Connector Fields

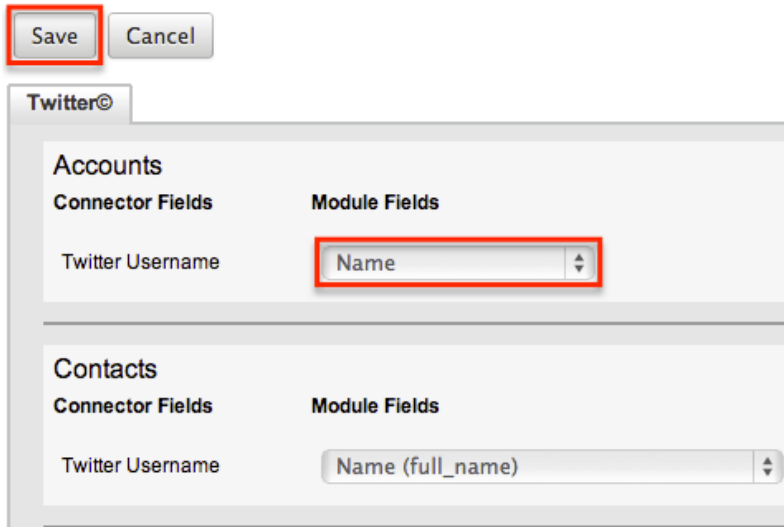
Some connectors query external services based on fields in Sugar. These mappings can be customized to use different fields based on your organizations needs. To configure the field mappings, simply click the Map Connector Fields button on the Connector Settings page.



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 each connector that has field mappings available. Each of the enabled module(s) will display the connector fields and will need to have the corresponding Sugar field selected from the dropdown list. If the connector is enabled for multiple modules, be sure to select the proper fields for each module. Once the field mapping is set up properly, click "Save" to preserve your changes.

Connector Settings » Map Connector Fields



Please note that the connector fields may not always match up with a stock field in Sugar. If you wish to capture and map certain fields from the connector to Sugar, you will need to create new fields via Admin > Studio. For more information on how to create fields in Studio, please refer to the [Studio](#) documentation.

The following fields are available from the default connector mappings:

| Connector | Fields |
|-----------|------------------|
| Twitter | Twitter Username |

The field mapping for Twitter is used to look up and pull the information based on the value in the specific Sugar field. For example, if the Twitter connector is mapped to a custom field (New Twitter field) with a valid Twitter ID, then it will pull the feeds associated to that ID to the Twitter dashlet. Please note that mapping the Twitter username to the Name field will not always result in a match, so it is recommended that you map to a field containing the Twitter ID in the record view. For more information on how to use features related to the Twitter connector, please refer to the [Creating Via Twitter Dashlet](#) section of the Cases documentation.

Managing Connector Search

Connectors that have multiple fields for mapping need to specify which fields are to be used when searching for data in the module. To designate the connector fields for search, click the Manage Connector Search button on the Connector Settings page. Please note that there are no connectors which come out-of-the-box with Sugar that have search fields defined, so no connectors will be available to configure on this page.



Manage Connector Search

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

The Manage Connector Search page will normally display a tab for every connector that needs connector fields defined for search. The available search fields are limited to the input parameters of the connector being used. To enable a field for search, simply drag and drop the desired field from the Available column to the Default column. Once the necessary field(s) have been selected, click "Save" to preserve your changes.

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.

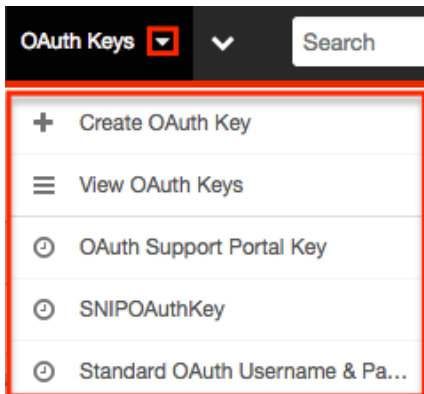
OAuth Keys Fields

The OAuth Keys 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. |
| OAuth Version | The version of the OAuth protocol/framework to use. (OAuth 1.0, OAuth 2.0) |
| Description | A description or other information about the OAuth key. |

OAuth Keys Module Tab

The OAuth Keys module tab appears on the navigation bar once you select "OAuth Keys" from the Administration page. Once in the OAuth Keys list view, you can click the triangle in the OAuth Keys module tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The [Recently Viewed menu](#) displays the list of 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

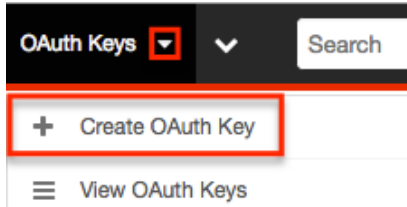
There are various methods for creating OAuth keys in Sugar including via the OAuth Keys module and via duplication. The full edit view layout opens when creating the OAuth keys directly from the OAuth menu and includes all of the relevant fields for your organization's OAuth keys. The quick create form is a shortened version of the OAuth Keys edit view and typically contains fewer fields.

Creating Via OAuth Keys Module

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

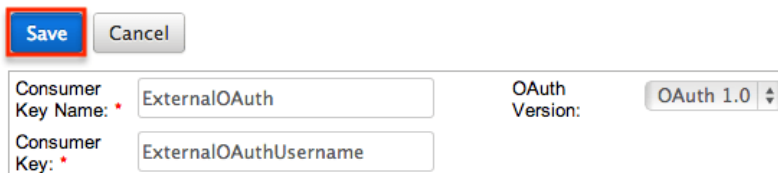
Use the following steps to create an OAuth key via the OAuth Keys module:

1. Navigate to Admin > OAuth Keys.
2. Click the triangle in the OAuth Keys module tab and select "Create OAuth Key".



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 the 'Create' form for an OAuth key. At the top left, there are two buttons: 'Save' (highlighted with a red box) and 'Cancel'. Below the buttons, there are two input fields. The first is labeled 'Consumer Key Name: *' and contains the text 'ExternalOAuth'. The second is labeled 'Consumer Key: *' and contains the text 'ExternalOAuthUsername'. To the right of these fields, there is a label 'OAuth Version:' followed by a dropdown menu showing 'OAuth 1.0'.

Creating Via Duplication

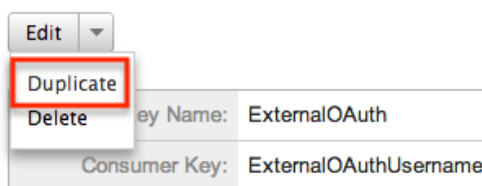
You can also create a new OAuth key by duplicating an existing record. The duplicate option is useful if the key you are creating has similar information to an existing OAuth key.

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

Use the following steps to create an 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



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 OAuth Version: OAuth 1.0

Consumer Key: * ExternalOAuthUsername

Note: When duplicating, the Consumer Key and OAuth Version are not modifiable.

Viewing OAuth Keys

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

Viewing Via List View

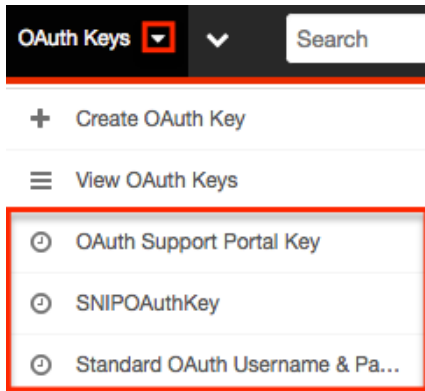
The OAuth Keys list view displays all OAuth key records meeting the current search criteria. To access the list view, simply click the OAuth Keys module tab. While list view shows key OAuth key fields, you can click the key's name to open the record in detail view. For more information on viewing OAuth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

Viewing Via Detail View

The OAuth Keys 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 Keys list view. For more information on viewing OAuth keys via detail view, please refer to the [OAuth Keys Detail View](#) section.

Viewing Via Recently Viewed

As you work in the OAuth Keys module, Sugar will keep track of which OAuth key records you have recently viewed. Click the triangle in the [OAuth Keys module tab](#) to see a list of the 3 records you most recently viewed in the module. Clicking the record's name within the list will open it in detail view.



Searching OAuth Keys

The OAuth Keys 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 Keys 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

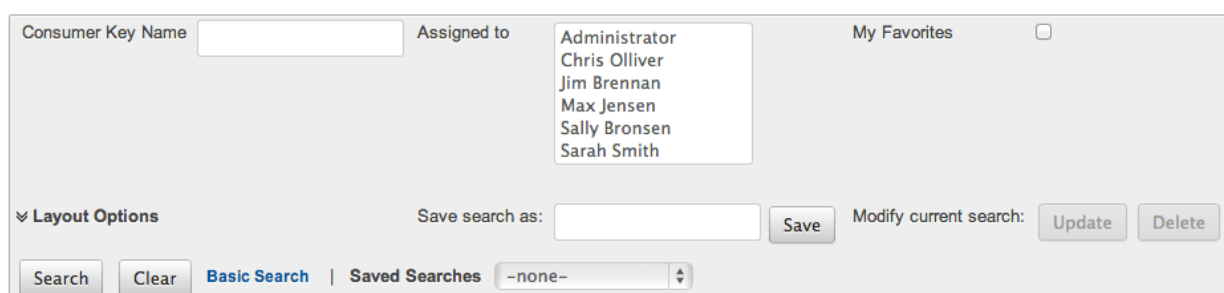
When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all OAuth key records to which you have access, 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.

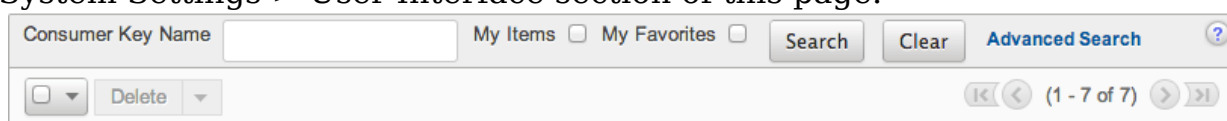
OAuth Keys List View

The OAuth Keys 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 System Settings > User Interface section of this page.

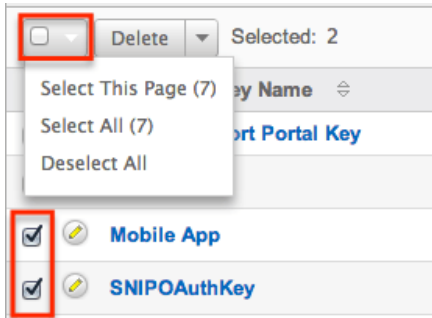


The screenshot shows a search interface for OAuth keys. At the top, there is a text input field labeled "Consumer Key Name". To its right are two checkboxes: "My Items" and "My Favorites". Further right are "Search" and "Clear" buttons, followed by a link for "Advanced Search" with a help icon. Below this is a "Delete" button with a dropdown arrow. On the far right, there is a pagination control showing "(1 - 7 of 7)" with navigation arrows for first, previous, next, and last page.

Checkbox Selection

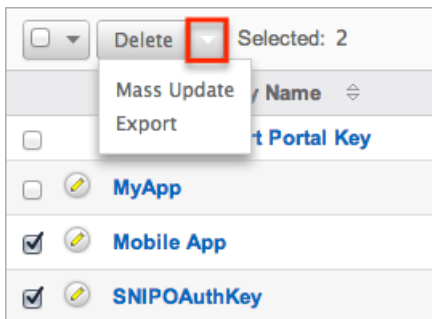
You can perform several actions on OAuth key records directly from the list view by first selecting the desired records. To select individual key records on the OAuth Keys list view, mark the checkbox on the left of each row. To select or deselect multiple key records on the list view, use the options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

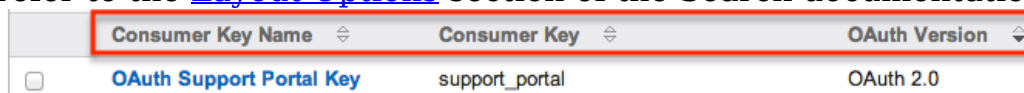


The options in the Actions menu allow you to perform the following operations:

| 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.



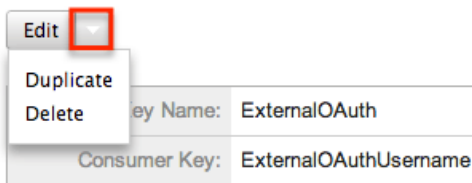
OAuth Keys Detail View

The OAuth Keys 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 Keys 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 System Settings > User Interface section of this page.

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 Keys detail view, there are two buttons that allow you to page through each OAuth key in the OAuth Keys 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

Edit (6 of 7)

Consumer Key Name: ExternalOAuth OAuth Version: OAuth 1.0

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 Keys detail view page. The Tokens subpanel can be collapsed or expanded by clicking the double arrow to the left of the subpanel's name.

⌵ Tokens

| 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.

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 Keys edit view and quick create forms. Edit view is available within the OAuth Keys module and includes all of the key fields you should need.

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

[ExternalOAuth](#) » Edit

Save Cancel

Consumer Key Name: OAuth Version: OAuth 1.0

Consumer Key:

Quick create is available for editing keys from outside the OAuth Keys 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.

Consumer Key Name My Items My Favorites

Delete

| Consumer Key Name | Consumer Key |
|---|----------------|
| <input type="checkbox"/> OAuth Support Portal Key | support_portal |
| <input type="checkbox"/> ExternalOAuth | |

Consumer Key Name:

Consumer Key:

Consumer Secret:

Note: Consumer Key and OAuth Version fields can not be edited after creation. If either of these fields need to be changed, you will have to create a new OAuth key.

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.

| Consumer Key Name | Consumer Key |
|--|--------------|
| <input type="checkbox"/> OAuth Support Portal Key | |
| <input type="checkbox"/>  MyApp | |

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 Keys 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.

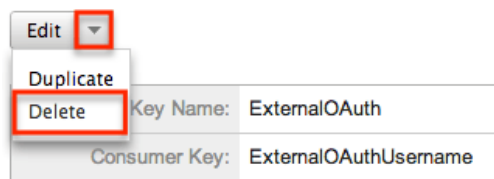
Note: The system generated OAuth Support Portal Key should not be deleted.

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

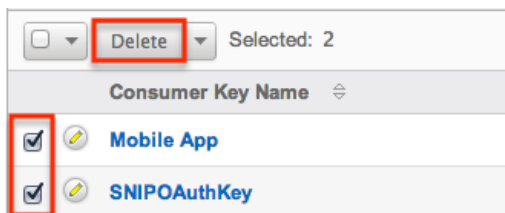


3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

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 Keys list view by clicking the OAuth Keys 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.

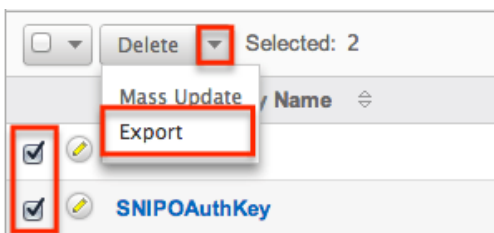
Due to PHP memory limitations on the server, there may be occasions when the

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 Keys list view by selecting "Export" from the Actions menu.

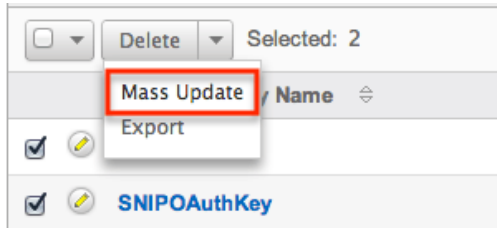


Mass Updating OAuth Keys

Mass Updating allows users to make the same change to multiple OAuth key records at once from the OAuth Keys 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 Keys list view by clicking the OAuth Keys 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.



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, select the module that will contain the imported data.

[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

The Upgrade Wizard allows on-site customers to upgrade their Sugar instance to the latest software version. The Upgrade Wizard is only available for administrators of on-site installations. For steps to complete an on-site upgrade using the wizard, please refer to the Upgrading section of the [Installation and Upgrade Guide](#).

Backups

Backups allow administrators to easily backup the file system in their instance of Sugar. Please note that the Backups option is only available for on-site instances as SugarCRM manages backups for on-demand instances. Keep in mind that performing a backup will backup only the web files and you should perform database backups on a regular basis per the instructions from your database vendor.

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

1. Navigate to the Administration page and select "Backups" under the System section.
2. Enter a path in the Directory field to create the backup file in for Sugar. This directory must be writable by Sugar and the path needs to be fully qualified.
 - Please do not specify a path that points to any directory contained by the Sugar instance location on your server. Doing this will continue to increase the size of the backups as previous backup archives will accumulate into the most current backup.
3. Enter a filename to use for the backup file.
 - Note: The filename should end with a .zip.
4. 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 in a .zip file, enter the following information for information on how to backup your database. To backup your Sugar application files in a .zip file, enter the following information:

Directory:
Must be writable by Sugar

Filename:

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

Note: If the backup fails to complete and your instance is hosted on-site, please evaluate your server error logs to determine the cause. If the failure is due to insufficient PHP settings, you can increase the `max_execution_time` setting by editing `php.ini` and restarting your webserver.

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

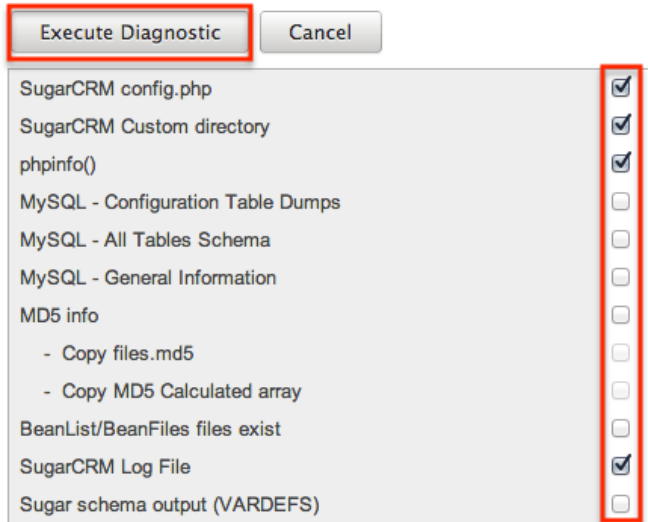
Diagnostic Tool allows administrators to create a file with many diagnostic and configuration details. This tool will collect basic system information regarding Sugar and server configuration and place it all into a zip file to help debug or diagnose issues. The Diagnostic Tool has options that you can 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 asterisks 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...

100%

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 may 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 may 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 may 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: <small><i>i</i></small> | <input type="checkbox"/> |
| Tracker Sessions: <small><i>i</i></small> | <input type="checkbox"/> |
| Tracker Performance: <small><i>i</i></small> | <input type="checkbox"/> |
| Tracker Queries: <small><i>i</i></small> | <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 Manager

PDF Manager allows administrators to create and manage templates for generated PDF files for any deployed module, custom or standard. The PDF Manager is available to only administrative users and can be accessed through Admin > PDF Manager. For more information on the PDF Manager, please refer to the [PDF Manager](#) documentation in the Administration guide.

Mobile

The Mobile settings on the Administration page allow administrators to configure what modules they want enabled or disabled for SugarCRM Mobile and the browser-based Sugar mobile application. In addition, you can enable the mobile offline capability for your instance for SugarCRM Mobile.

The browser-based Sugar mobile application allows users to access various Sugar modules (stock and custom modules) via a web browser on a smartphone or PDA. SugarCRM Mobile is a native mobile application that enables users to access Sugar from certain smartphones (e.g., iPhone). For a list of supported devices for SugarCRM Mobile, please refer to the [Mobile Supported Platforms](#) page. You can add, edit, and remove fields, including Calculated Value fields, to customize the mobile layouts via Admin > Studio. For more information on configuring fields, please refer to the [Fields](#) section of the Developer Tools documentation. For more information on configuring the mobile layouts, please refer to the [Mobile Layouts](#) section of the Developer Tools documentation.

Note: Calculated Value fields will not be updated in real time for mobile edit view layouts.

Configuring SugarCRM Mobile

You can configure what modules are available for use in SugarCRM Mobile via

Admin > Mobile. Please note that the Bug Tracker, Campaigns, Contracts, Knowledge Base, Products, and Targets modules are not available for SugarCRM Mobile. For more information on enabling modules for SugarCRM Mobile, please refer to the [Enabling Modules for Mobile Access](#) section of this documentation.

Configuring Mobile Browser Access

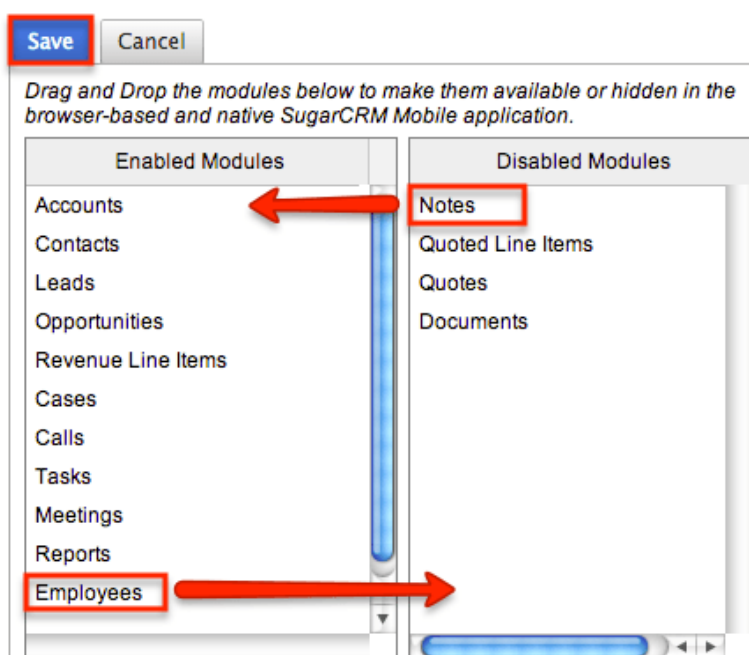
The modules enabled for use via Admin > Mobile will also apply to the browser-based Sugar mobile application. For more information on enabling modules for the browser-based Sugar mobile application, please refer to the [Enabling Modules for Mobile Access](#) section of this documentation. Please note that the Reports module is not available for the browser-based Sugar mobile application.

Enabling Modules for Mobile Access

Use the following steps to enable modules for mobile access:

1. Navigate to Admin > Mobile.
2. To enable a module for the browser-based and native SugarCRM mobile application, drag and drop the module from the Disabled Modules column to the Enabled Modules column.
3. To disable a module, drag and drop the module from the Enabled Modules column to the Disabled Modules column.

Mobile



-
4. Click "Save" to apply the changes made to SugarCRM Mobile and the browser-based Sugar mobile application.

Enabling Offline Mobile Access

You can also allow mobile offline capabilities for your instance in SugarCRM Mobile by marking the Offline enabled checkbox in Admin > Mobile. Enabling offline access allows the user's mobile device to cache records for offline viewing as well as buffer changes they make to records while offline. The changes made will be synced once they are reconnected. Please note that the offline option must be enabled in Sugar first before users can enable the offline mode on their devices. For more information on enabling offline in mobile devices, please refer to the [SugarCRM Mobile User Guide](#) for your specific mobile device type (iPhone, Android).

Drag and Drop the modules below to make them available or hidden in the browser-based and native SugarCRM Mobile application.

| Enabled Modules | Disabled Modules |
|--------------------|-------------------|
| Accounts | Notes |
| Contacts | Quoted Line Items |
| Leads | Quotes |
| Opportunities | Documents |
| Revenue Line Items | |
| Cases | |
| Calls | |
| Tasks | |
| Meetings | |
| Reports | |
| Employees | |

Offline Settings

Offline enabled

Last Modified: 01/31/2017 05:59pm

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 Additional Cache Files : Loops through the cached API folders and deletes any *.php files as well as the cached clients 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 synch 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 defined in the vardefs. You have the option of exporting this script and then running it against your database using external database management tools, or to allow the administration module to run the script.

NOTE: any changes you make to the script in the textbox will be reflected in the exported or executed code.

```
/* Table : accounts */
/*COLUMNS*/
/* INDEXES */
/*MISSING INDEX IN DATABASE - idx_accnt_assigned_del -index ROW */
ALTER TABLE accounts ADD INDEX idx_accnt_assigned_del (deleted,assigned_user_id);
/*Checking Custom Fields for module : Accounts */
CREATE TABLE accounts_cstm (id_c char(36) NOT NULL , PRIMARY KEY (id_c)) CHARACTER SET utf8 COLLATE utf8_general_ci;
/*MISSING IN DATABASE - test_c - ROW*/
ALTER TABLE accounts_cstm add COLUMN test_c varchar(100) NULL ;
/*MISSING IN DATABASE - testint_c - ROW*/
ALTER TABLE accounts_cstm add COLUMN testint_c int(150) NULL ;
```



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.

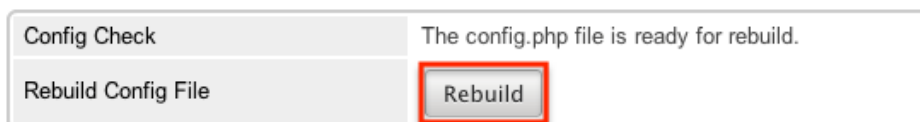
Rebuild .htaccess File

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:



| 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 - 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 |
| Create Future TimePeriods | On the hour; 11:00pm | 01/01/2012 01:30am - | 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 Sidecar Files

Rebuild Sidecar Files will replace compressed JavaScript files for the Sidecar framework with original, full JavaScript source files. The full files will then be compressed (minified) to maximize application performance.

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 cu lowercase field name |
|  Repair Teams | Rebuilds private team |
|  Repair Roles | Repairs Roles by ad new Access Controls |

- 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 Inbound Email Accounts

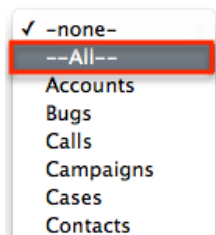
Repair Inbound Email Accounts loops through every active inbound email account in Sugar and verifies the settings configured. Any Inbound email account that fails to successfully repair will be listed on the page and will require someone to manually repair them by reentering a valid user name and password.

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

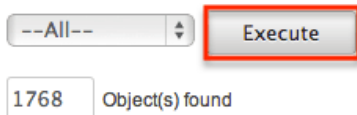
Select a module to remove potential XSS strings. Select "All" to address every module. Press execute to start the detection and removal process.



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.



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

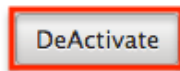
Repair Activities takes Call or Meeting records where the status field does not equal

"Held" and updates the end date based on the duration of the activity. If the status equals "Held" or the record is marked as delete, 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 "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.

Clear Additional Cache

The Clear Additional Cache option loops through the cached API folders and deletes any *.php files as well as the cached clients folder. This option is also performed by the Quick Repair and Rebuild option. The screen will show "Done" when complete.

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

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 following definitions are suggested meanings for the fields, but the fields may 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 selected is URL. |
| Status | The current status of the scheduler (i.e. Active, Inactive) |

Note: Any times configured for schedulers will be based on the admin user's time zone (user id = '1').

Default Schedulers

The default schedulers that packaged with Sugar are required for different activities throughout the application. The following lists the default schedulers and their default settings:

| Name | Interval | Range | Status |
|------|----------|-------|--------|
|------|----------|-------|--------|

| | | | |
|--|---------------------------------|--|----------|
| Check Inbound Mailboxes | As often as possible. | 01/01/2005 02:00am - 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 |
| Create Future TimePeriods | On the hour; 11:00pm | 01/01/2012 01:30am - 12/31/2030 06:59pm | Active |
| Process Author Scheduled Job | As often as possible. | 01/01/2015 07:15am - 12/31/2040 18:59pm | Active |
| Process Workflow Tasks | As often as possible. | 01/01/2005 05:30am - 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 |
| Prune Old Record Lists | As often as possible | 01/01/2005 08:15am - 12/31/2020 03:59pm | Active |
| Prune Tracker Tables | On the hour; 02:00am; 1st | 01/01/2005 12:00pm - 12/31/2020 06:59pm | Active |
| Remove diagnostic tool files | On the hour; 04:00am; Sunday | 01/01/2005 06:00am - 12/31/2030 06:59pm | Active |
| Remove temporary files | On the hour; 04:00am | 01/01/2005 05:30am - 12/31/2030 06:59pm | Active |
| Remove temporary PDF files | On the hour; 04:00am | 01/01/2005 04:00am - | Active |

| | | | |
|---|--------------------------------------|--|----------|
| | | 12/31/2030 06:59pm | |
| Run Email Reminder Notifications | As often as possible. | 01/01/2008 08:30am - 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 |
| 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 Report Generation Scheduled Tasks | On the hour; 06:00am | 01/01/2005 02:15am - 12/31/2020 06:59pm | Inactive |
| Sugar Heartbeat | On the hour; 04:00am | 01/01/2005 11:45am - 12/31/2030 03:59pm | Active |
| Update tracker_sessions Table | As often as possible. | 01/01/2005 01:00am - 12/31/2020 06:59pm | Active |

Check Inbound Mailboxes

The 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 email 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 set up and configure a group inbound email account, please refer to the [Email](#) documentation in the Administration guide.

Clean Jobs Queue

The 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']`.

Create Future TimePeriods

The Create Future TimePeriods scheduler is active and runs every day at 11:00 PM by default. When setting up the Forecasts module for the first time, you are prompted with what type of time period (Yearly or Quarterly) and how many future and past time periods you would like. This scheduler runs based off of those settings and creates new time period records as needed for forecast data entry.

For more information about configuring the time periods for forecasting, please refer to the [Forecast Configuration](#) documentation in the Administration guide.

Process Author Scheduled Job

The Process Author Scheduled Job scheduler is responsible for processes associated with the Process Author business process management tool. It is active and runs as often as possible by default. The Process Author Scheduled Job will check for any active time-based process events in a pending state. If any processes meet this criterion, the scheduler will ensure the process flow continues. For more information about Process Author, please refer to the [Process Author](#) documentation in the Administration guide.

Note: Process Author events processed by this scheduler will be run by the admin user (user id = '1') in Process History unless the admin user is disabled.

Process Workflow Tasks

The Process Workflow Tasks scheduler is active and runs as often as possible by default. This scheduler processes and runs any time elapsed workflows are due to

run. If you utilize time-elapsd workflows, it is highly recommended to run this scheduler as often as possible to ensure the workflows are executed quickly. For more information on creating workflows, please refer to the [Workflow Management](#) documentation in the Administration guide.

Note: Workflows processed by this scheduler will be run by the admin user (user id = '1') unless the admin user is disabled.

Prune Database on 1st of Month

The 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.

Prune Old Record Lists

The Prune Old Record Lists scheduler is active and runs as often as possible by default. This scheduler job will clean up backend database entries Sugar uses when generating export files. Such entries that are older than 1 hour from the current date and time will be removed from the record_list database table.

Keeping this scheduler active will help prevent exports from failing due to size limitations.

Prune Tracker Tables

The 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 of the Administration guide.

Remove Diagnostic Tool Files

The Remove Diagnostic Tool Files scheduler is active and runs Sundays at 4:00 AM by default. The `./cache/diagnostic` directory serves as a temporary directory for data generated by Sugar's Diagnostic Tool, which allows administrators and developers to capture basic system and server configuration details in order to diagnose problems in a Sugar instance. The tool places this data into a zip file on the server. The Remove Diagnostic Tool Files scheduler will remove any of these temporary files from the directory once a week during off-peak hours. For more information about the Diagnostic Tool, please refer to the [Diagnostic Tool](#) documentation.

Remove Temporary Files

The Remove Temporary Files scheduler is active and runs daily at 4:00 AM by default. Sugar uses a cache directory to store files such as images, documents, and installable modules uploaded by users. Some of these documents may be large in size and can cause performance issues. This scheduler will remove any unused files that are found in the `./uploads/tmp` directory or in most user-configured upload directories. For more information about temporary file storage, please refer to the [Advanced Configuration Options](#) documentation.

Remove Temporary PDF Files

The Remove Temporary PDF Files scheduler is active and runs daily at 4:00 AM by default. The `./cache/pdf/` directory serves as a temporary directory for in-progress PDF files generated from reports, quotes, and other parts of Sugar. Upon successful completion of the PDF operation, the file is typically removed from the directory, but there may be circumstances where orphaned PDF files could remain in the directory. This scheduler will remove any PDF files from the directory

during off-peak hours.

Run Email Reminder Notifications

The 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.

Run Nightly Mass Email Campaigns

The 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.

Run Nightly Process Bounced Campaign Emails

The 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 set up and configure a bounce inbound email account, please refer to the [Email](#) documentation of the Administration guide.

Run Report Generation Scheduled Tasks

The Run Report Generation Scheduled Tasks scheduler is inactive by default with an interval set to run daily at 6:00 AM when activated. This scheduler executes any scheduled reports and emails the results to the designated user. If you want to utilize scheduled reports, please enable this scheduler, otherwise the reports will not be emailed. We recommend running this scheduler as often as possible, this way if someone schedules a report for 6:15 AM, they will not have to wait until 7:00 to receive the report. For more information on scheduling reports, please refer to the [Scheduling Reports](#) section in the Reports documentation of the Application guide.

Sugar Heartbeat

The Sugar Heartbeat scheduler is active with an interval set to run daily at 4:00 AM by default. This scheduler ensures that Sugar continues to receive heartbeat information even if no users have logged into your instance in the last three days. When this occurs, the Sugar heartbeat information will be sent automatically when cron runs.

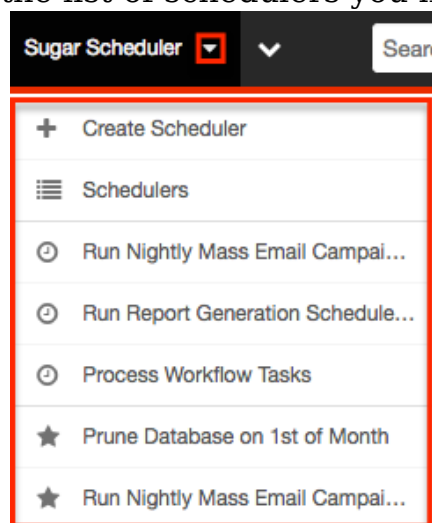
Update tracker_sessions Table

The 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.

Schedulers Module Tab

The Schedulers module tab can be accessed by navigating to the Administration page and clicking "Scheduler" in the System section. Once in the Schedulers list view, you can click the triangle in the Sugar Scheduler module tab to display the

Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform important actions within the module. The [Recently Viewed menu](#) displays the list of 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

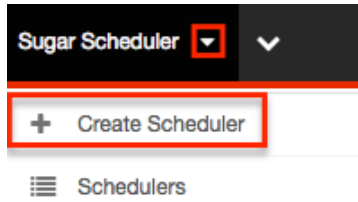
There are various methods for creating schedulers in Sugar including via the Schedulers module and via duplication. The full edit view layout opens when creating the scheduler directly from the Schedulers menu and includes all of the relevant fields for your organization's schedulers. Schedulers can 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 Sugar Scheduler 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. Navigate to Admin > Scheduler.
2. Click the triangle in the Sugar Scheduler module tab and select "Create Scheduler".



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. For more information on setting the advanced options for the interval, please refer to the [Advanced Options](#) section.
4. Once the necessary information is entered, click "Save".

Create


A screenshot of the 'Create Scheduler' form. At the top, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red rectangular box. Below the buttons, there are three 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 Copy 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 "Copy" from the Actions menu.

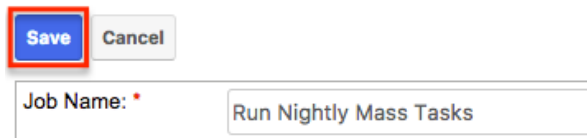
Run Nightly Mass Email Campaigns 



3. 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



The screenshot shows a form with two buttons: 'Save' (highlighted with a red box) and 'Cancel'. Below the buttons is a text input field labeled 'Job Name: *' with the text 'Run Nightly Mass Tasks' entered.

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

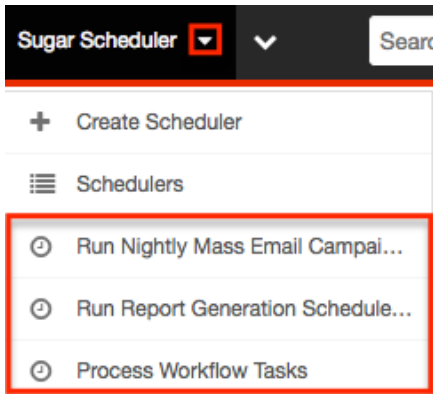
The Schedulers list view displays all scheduler records meeting the current search criteria. To access the list view, simply click the Schedulers module tab. While list view shows key scheduler fields, you can click the scheduler's name to open the record in detail view. For more information on viewing 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. Click the triangle in the [Sugar Scheduler module tab](#) to see a list of the 3 schedulers you most recently viewed. Clicking the scheduler name will 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.

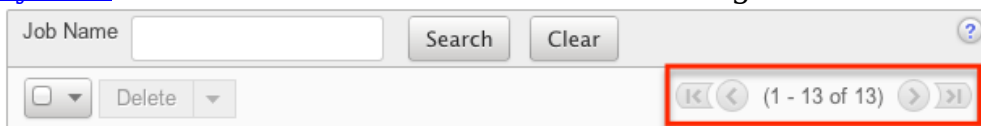
Schedulers List View

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.

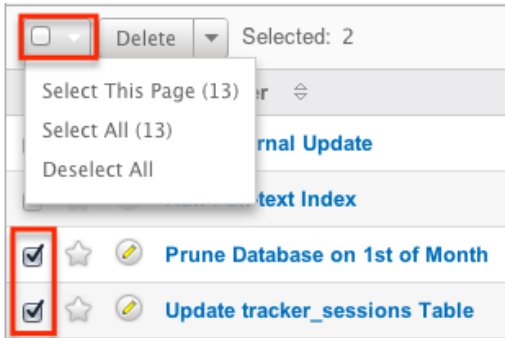
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.



Checkbox Selection

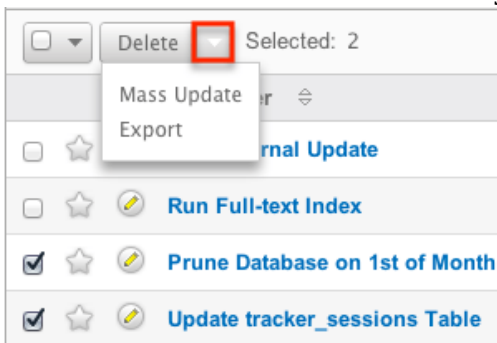
You can perform several actions on scheduler records directly from the list view by first selecting the desired records. To select individual scheduler records on the Schedulers list view, mark the checkbox on the left of each row. To select or deselect multiple scheduler records on the list view, use 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.

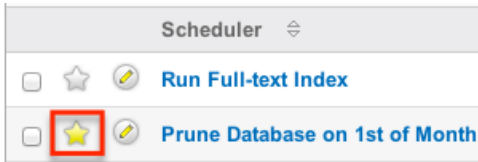


The options in the Actions menu allow you to perform the following operations:

| 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 Sugar Scheduler 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.

Run Nightly Mass Email Campaigns ★



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

| Menu Item | Description |
|------------------------|--------------------------|
| Edit | Edit this scheduler |
| Copy | 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 ▾

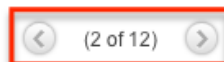
| | |
|--------------------|--------------------------------|
| Job Name: | Prune Database on 1st of Month |
| Date & Time Start: | 01/01/2005 02:30pm |
| Date & Time End: | 12/31/2020 06:59pm |

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 run. 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.

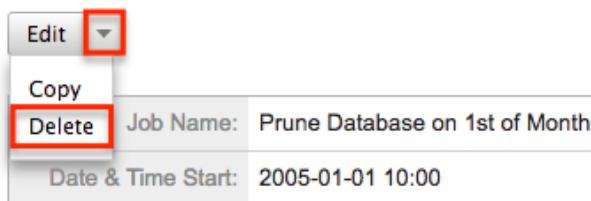
Note: If you wish to disable a scheduler, but do not want to delete it, you can set the status to Inactive and it will not be ran.

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 ☆

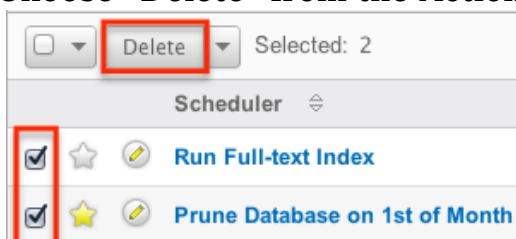


3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

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.



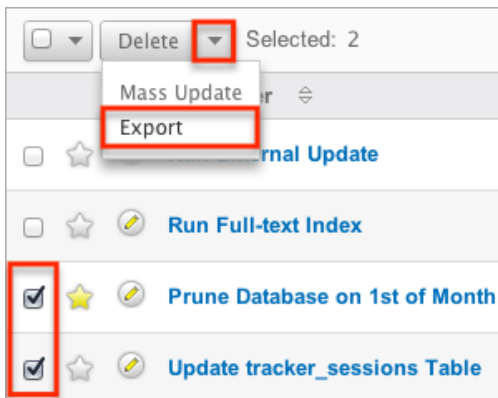
5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

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.

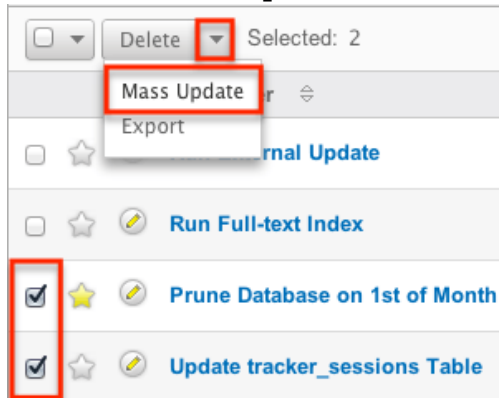


Mass Updating Schedulers

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- | | |

Update Cancel

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 that 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 [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.

Job Name: *

Job:

Advanced Options:

Interval: * min hrs date mo day

The above uses standard crontab notation.

Advanced Options

Execute If Missed:

Date & Time Start: * :

Date & Time End: :

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. |
| / | Forward slash is used to represent increments. For example, */15 in the mins field will run every 15 minutes. 30/5 in the mins field 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 set up automatically, but it must be configured for on-site instances. In UNIX systems (MAC and Linux) you can configure crontab to run the schedulers. Navigate to Admin > Scheduler to get the system information necessary to set up the crontab.

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.

To Setup Cron

Note: In order to
* * * * *

Setting Up in Unix/Linux

Use the following steps to set up crontab to run the Sugar schedulers:

1. From a command prompt, execute the following command: `crontab -u apache -e`
2. The text editor will launch as the user "apache". If your webserver is running under a different user, please adjust the line accordingly.
3. Add in the commands from Admin > Schedulers into the crontab file:
`* * * * * cd /var/www/sugar123; php -f cron.php > /dev/null 2>&1`
Note: Make sure that the path to the root directory of Sugar and to PHP is correct.
4. Save the changes to the file. This will run the cron job every minute.

You can check crontab to see what commands are being run by executing the following command: "`crontab -u apache -l`".

Last Modified: 02/01/2017 03:36pm

PDF Manager

Overview

The PDF Manager is used to create and manage templates for generated PDF files for any deployed module, custom or standard. Sugar comes with two PDF templates out of the box (Quote and Invoice).

Note: Legacy Quote PDF Templates (custom Quote templates created through code customizations) are not displayed in the PDF Manager but are still available in the Quotes module provided the templates were built off the TCPDF engine.

PDF Manager Fields

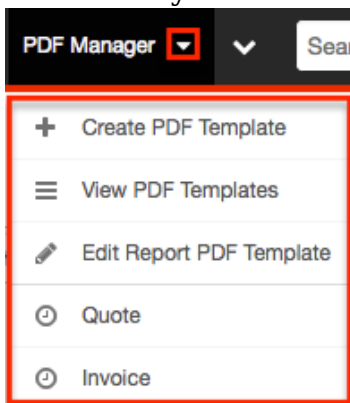
The PDF Manager module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.

| Field | Description |
|------------------|--|
| Author | The author name to be placed in the PDF properties |
| Description | A description or other information about the template |
| Footer Text | The text to be placed in the template's footer |
| Header Logo File | Click "Choose File" to upload a header image to the template |
| Header Text | The text to be placed in the template's header |
| Header Title | The title of the template header |
| Keyword(s) | The keywords to be placed in the PDF properties |
| Module | The module this template will work in Note: Once a template is created, the module cannot be changed. |
| Name | The name or designation of the template |
| Published | Determines if a template is available to users or not |
| Subject | The subject to be placed in the PDF |

| | |
|----------|---|
| | properties |
| Teams | The Sugar team(s) assigned to the template record |
| Template | The content of the template |
| Title | The title to be placed in the PDF properties |

PDF Manager Module Tab

The PDF Manager module tab can be accessed by navigating to the Admin page and clicking "PDF Manager" in the System section. Once in the PDF Manager list view, you can click the triangle in the PDF Manager module tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The [Recently Viewed menu](#) displays the list of templates you last viewed in the module. Please note that clicking the module tab allows you to access the PDF Manager list view.



The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|--|--|
| Create PDF Template | Opens the edit view layout to create a new template |
| View PDF Templates | Opens the list view layout to search and display templates |
| Edit Report PDF Template | Opens the edit view layout to modify the report template |

Creating PDF Templates

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

creating the template directly from the PDF Manager menu and includes all of the relevant fields for your organization's templates.

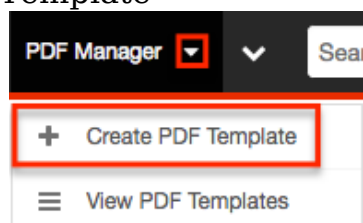
Note: It is generally recommended to create a new template via duplication and then modify to suit your needs.

Creating Via PDF Manager Module

You can create a new template via the Create PDF Templates option in the PDF Manager module tab. This opens up the edit view layout which allows you to enter in all the relevant information for the template.

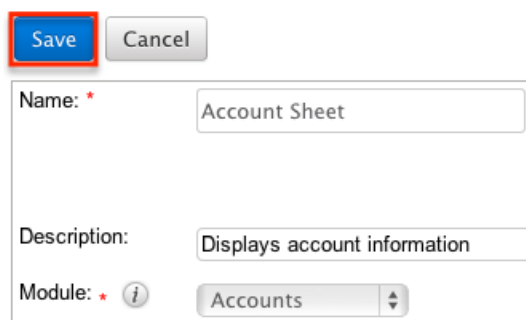
Use the following steps to create a template via the PDF Manager module:

1. Navigate to Admin > PDF Manager.
2. Click the triangle in the PDF Manager module tab and select "Create PDF Template"



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 the 'Create' form in the PDF Manager module. The form has two buttons at the top: 'Save' and 'Cancel'. The 'Save' button is highlighted with a red rectangular box. Below the buttons, there are three input fields: 'Name: *' with the value 'Account Sheet', 'Description:' with the value 'Displays account information', and 'Module: *' with a dropdown menu showing 'Accounts' and an information icon.

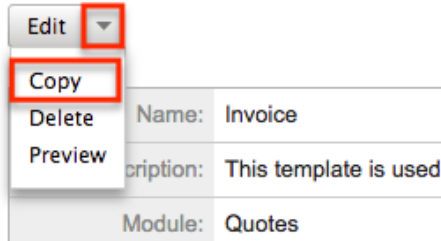
Creating Via Duplication

You can also create a new template by duplicating an existing template record. The Copy option is useful if the template you are creating has a similar layout to an existing template.

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

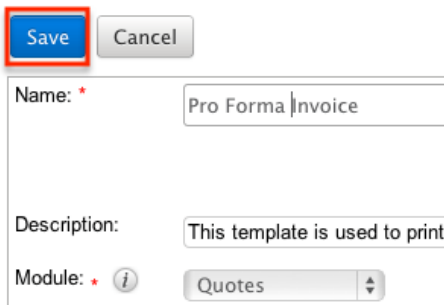
1. Navigate to a template record's detail view.
2. Select "Copy" from the Actions menu.

Invoice



3. The displayed edit view is pre-populated with the original template's values. Update the necessary [fields](#), then click "Save".

Create

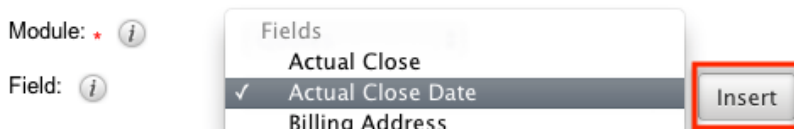


Note: If you change the module field during duplication, you will have to remove all variable references to the old module in the layout before saving.

Creating Content

The PDF template can contain images and HTML formatting as well as variable fields from the assigned module. TinyMCE is the rich text editor for formatting your template using HTML. For more information on using TinyMCE, please refer to the [TinyMCE](#) section in the User Interface in the Application guide.

To add variable fields from the assigned module, simply select the desired field from the Field dropdown and then click "Insert".



The variable will be placed wherever your computer's cursor is located in the template and can be moved around as necessary.

Note: The Link section provides all one-to-one and one-to-many relationships to

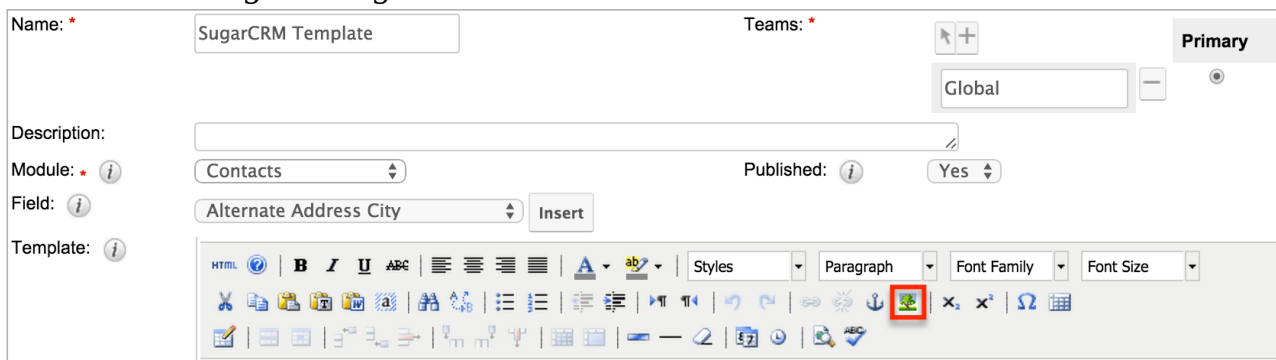
provide linked data in the template.

For modules that have a subset of data in the template (e.g. Product line items in Quotes), there are special containers in the template that indicate where the repeating areas start and stop. These containers are designated by the following commands :

- Start : {foreach from=\$product_bundles item="bundle"}
- End : {/foreach}

Note: These lines are important and if removed can cause errors when generating a PDF. If you encounter an error when generating a PDF, we recommend checking the template for these start and end placeholders.

To add images to a PDF template, simply select the image icon in the toolbar. Fill out the image details (Image URL, Alignment, Dimensions, Border, etc.) in the Insert/Edit Image dialog then click "Insert".



Note: Images can not be copy and pasted or drag and dropped into a PDF template. The image icon must be used to insert an image.

Viewing PDF Templates

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

Viewing Via List View

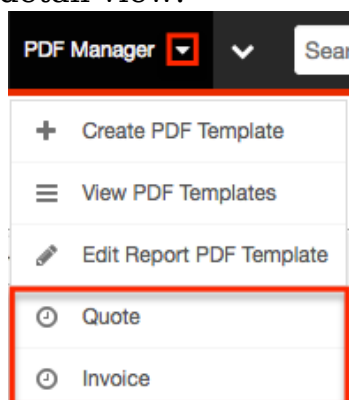
The PDF Manager list view displays all template records meeting the current search criteria. To access the list view, simply click the PDF Manager module tab. While list view shows key template fields, you can click the template's name to open the record in detail view. For more information on viewing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

Viewing Via Detail View

The PDF Manager detail view displays thorough template information including all template fields. The detail view can be reached by clicking a template record's link from anywhere in the application including from the PDF Manager list view. For more information on viewing templates via detail view, please refer to the [PDF Manager Detail View](#) section.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which templates you have recently viewed. Click the triangle in the [PDF Manager module tab](#) to see a list of the 3 templates you most recently viewed. Click the template's name from the list to open it in detail view.



Searching PDF Templates

The PDF Manager 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 PDF Manager 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 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 PDF Manager



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 a module and enter a template name, Sugar will only return template records with a matching name that are assigned to that module. Once the search is complete, the relevant results will populate in the [list view](#) below the search panel. To see all template records, simply click "Clear" and then "Search" to perform a blank search with no filters.

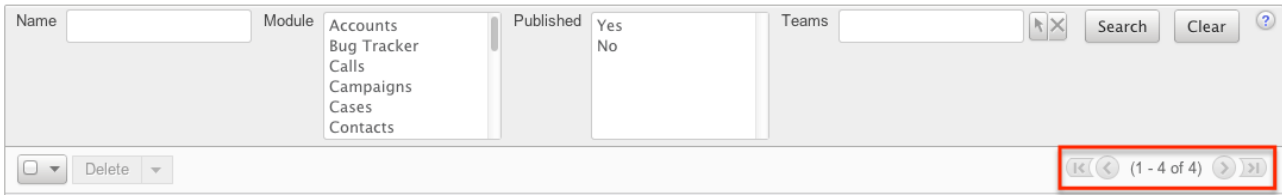
PDF Manager List View

The PDF Manager list view displays all template records meeting the current search criteria. You can view the basic details of each template 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.

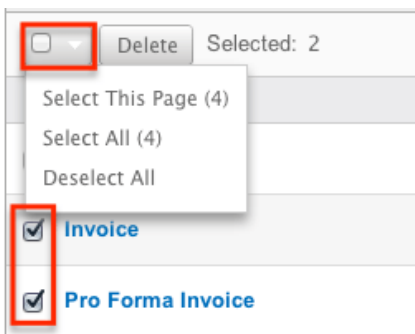
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.



Checkbox Selection

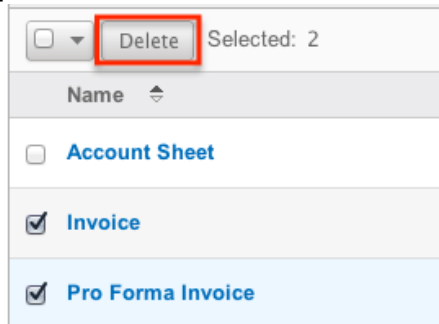
You can perform several actions on template records directly from the list view by first selecting the desired records. To select individual template records on the PDF Manager list view, mark the checkbox on the left of each row. To select or deselect multiple template records on the list view, use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

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



Actions Menu

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 PDF Manager list view is the following

operation:

| Menu Item | Description |
|------------------------|--|
| Delete | Delete one or more templates 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.

| Name | Module | Published | Date Created |
|--|----------|-----------|-----------------------|
| <input type="checkbox"/> Account Sheet | Accounts | Yes | 04/22/2013 11:19am |

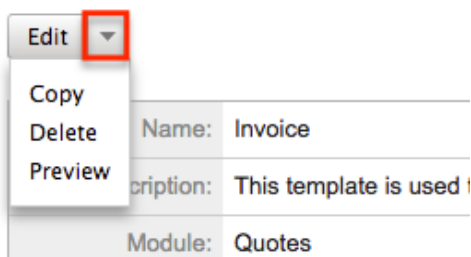
PDF Manager Detail View

The PDF Manager detail view displays thorough template information including all template fields which are grouped by default into the Overview and PDF Document Properties panels. The detail view can be reached by clicking a template record's link from anywhere in the application including from the PDF Manager list view.

Actions Menu

The Actions menu on the top left of each template'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.

Invoice



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

| Menu Item | Description |
|-------------------------|-------------------------|
| Edit | Edit this template |
| Copy | Duplicate this template |
| Delete | Delete this template |
| Preview | Preview this template |

Next or Previous Record

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

Pro Forma Invoice



Editing PDF Templates

Templates may be edited at any time to update or add information to the record. You can make changes to existing template records via the PDF Manager edit view. Edit view is available within the PDF Manager module and includes all of the template fields you should need.

[Pro Forma Invoice](#) » Edit

The screenshot shows the edit view for a PDF template. At the top, there are two buttons: 'Save' (highlighted with a red box) and 'Cancel'. Below the buttons is a form with three fields:

- 'Name: *' with a text input field containing 'Pro Forma Invoice'.
- 'Description:' with a text input field containing 'This template is used to print a pro forma'.
- 'Module: *' with an information icon and a dropdown menu showing 'Quotes'.

Editing Via Detail View

You can edit 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 your changes.

Pro Forma Invoice



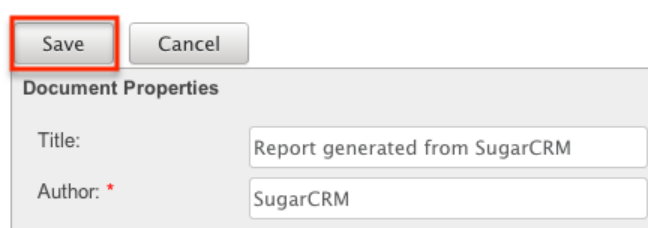
| | |
|--------------|---|
| Name: | Pro Forma Invoice |
| Description: | This template is used to print apro forma |
| Module: | Quotes |

Editing Report PDF Template

The Report PDF Template is used when generating a report as a PDF. The report template may be edited at any time to include your company's logo. This logo displays as a header in all Report PDF files.

You can edit the report template via the [detail view](#) by clicking the Edit Report PDF Template action in the PDF Manager module tab. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve your changes.

Report PDF Template

A dialog box titled "Document Properties" with "Save" and "Cancel" buttons at the top. The "Save" button is highlighted with a red border. Below the title bar, there are two text input fields: "Title:" with the value "Report generated from SugarCRM" and "Author: *" with the value "SugarCRM".

| | |
|---------------------|--------------------------------|
| Document Properties | |
| Title: | Report generated from SugarCRM |
| Author: * | SugarCRM |

Deleting PDF Templates

If a template record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the PDF Manager 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.

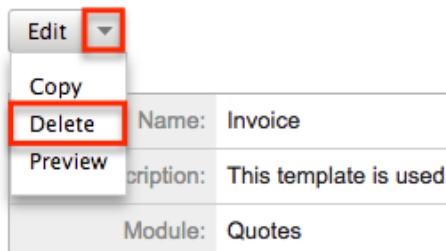
Deleting Via Detail View

Use the following steps to delete a template record via the detail view:

1. Navigate to a template record's detail view.

-
2. Select "Delete" from the Actions menu.

Invoice

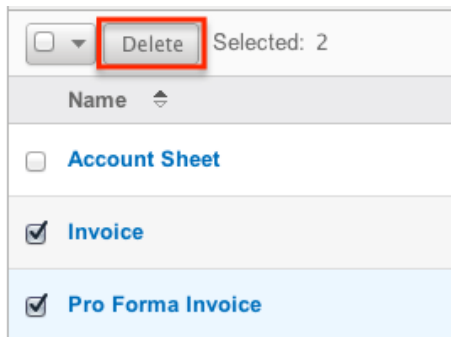


3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Mass Deleting Via List View

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

1. Navigate to the PDF Manager list view by clicking the PDF Manager module tab.
2. Use the [Basic Search](#) to find the template records you wish to delete.
3. Select the desired template 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.

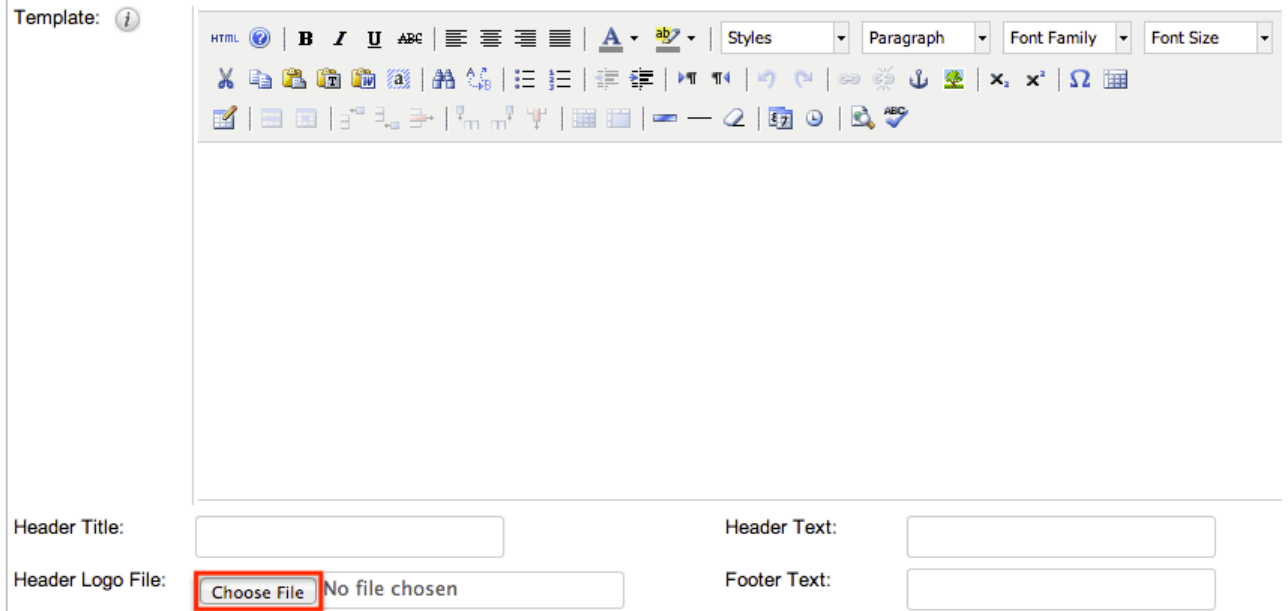
Due to PHP memory limitations on the server, there may be occasions when the application times out while deleting a large number of template records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Adding a Header Image to PDF Template

Image files can easily be uploaded from your local machine to be inserted as a header image on your PDF template. Once the image is added accordingly to the template, it will display in the header when the PDF file is generated in Sugar.

Use the following steps to add a header image to the PDF template:

1. Create a [new PDF template](#) or open up an existing template via Admin > PDF Manager.
2. Click the "Choose File" button in the Header Logo File field to open a file selection window from your browser.



3. Select the image file from your local machine then click "Open" to add the image.

Please note that you must save then [preview the PDF template](#) in order to view the inserted header image.

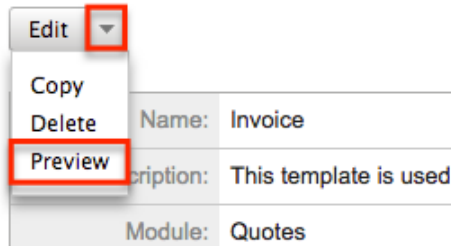
Previewing PDF Templates

Previewing PDF templates allows you to see what the template will look like before publishing it in Sugar. The preview option displays the PDF template with the database field names and not actual data values and is accessible from the detail view.

Use the following steps to preview a template via the detail view:

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

Invoice



3. The PDF will download to your computer for viewing.

Last Modified: 02/02/2017 01:44pm

Web Logic Hooks

Overview

Web logic hooks allow you to establish events on a per module basis for Sugar to send data from the record in focus to an external URL so that additional processing can be completed outside the Sugar application. When a Web Logic Hook is triggered, the data is not sent instantaneously. Rather, the data is queued and processed under the Dispatch Web Logic Hook scheduled job. Once the job is processed through a regular scheduler run, the data for the record that triggered the hook is transmitted to the designated URL in a JSON format for further processing. This can allow you to send this data to other applications within your organization or to manipulate the data and transmit it back to Sugar via the REST API.

Web Logic Hook Fields

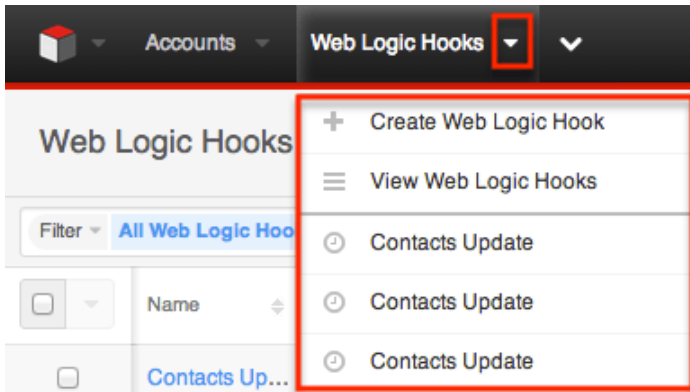
The Web Logic Hooks module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.

| Field | Description |
|----------------|--|
| Module Name | The module that the web logic hook will trigger off when the trigger event occurs in that module |
| Name | The name of the web logic hook |
| Request Method | The HTTP request method that the web |

| | |
|---------------|--|
| | logic will utilize to call out to the specified URL |
| Trigger Event | The event that must occur in order for the web logic hook to process |
| URL | The URL that will receive the data transmitted by the web logic hook Note : This URL should be a URL outside of your SugarCRM instance. If you have a Sugar On-Demand instance, it is your responsibility to host the URL that will process the web logic hook. |

Web Logic Hooks Module Tab

The Web Logic Hooks module tab is typically located on the navigation bar at the top of any Sugar screen after selecting "Web Logic Hooks" from the admin screen. Click the tab to access the Web Logic Hooks list view. You may also click the triangle in the Web Logic Hooks tab to display the Actions and Recently Viewed menu items. The Actions menu allows you to perform important actions within the module. The [Recently Viewed menu](#) displays the list of web logic hooks you last viewed in the module.



The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|---------------------------------------|--|
| Create Web Logic Hook | Opens the record view layout to create a new web logic hook |
| View Web Logic Hooks | Opens the list view layout to search and display web logic hooks |

Creating Web Logic Hooks

There are two methods for creating web logic hooks in Sugar including via the Web Logic Hooks module and duplication.

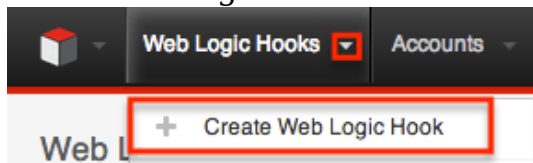
Creating Via Web Logic Hooks Module

The most common methods of web logic hook creation is via the Web Logic Hooks module using the Create Web Logic Hook option in the module tab or the Create button on the list view. This opens the record view layout which allows you to enter all of the relevant information for the account.

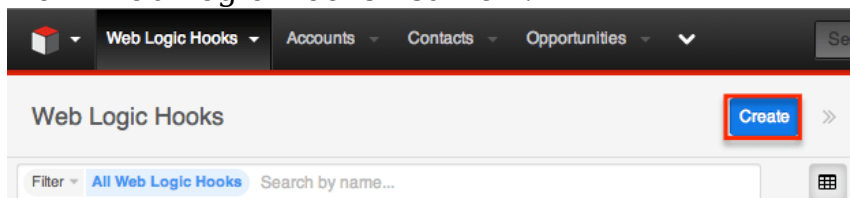
Use the following steps to create a web logic hook via the Web Logic Hooks module:

1. Click the triangle in the Web Logic Hooks module tab to open the actions menu and select "Create Web Logic Hook". You can also click the Create button on the upper right of the Web Logic Hooks list view.

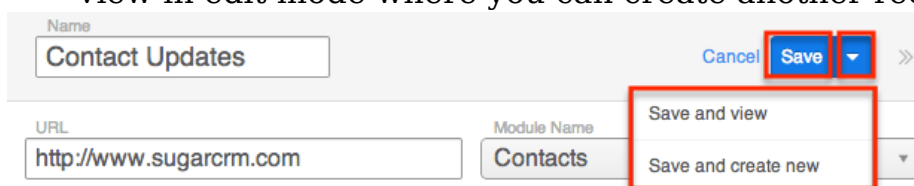
From Web Logic Hooks module tab:



From Web Logic Hooks list view:



2. Enter appropriate values for the [fields](#) in the record view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".
 - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.

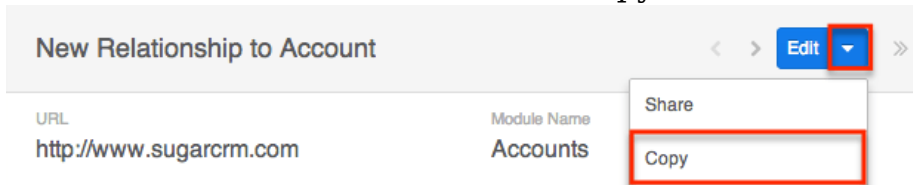


Creating Via Duplication

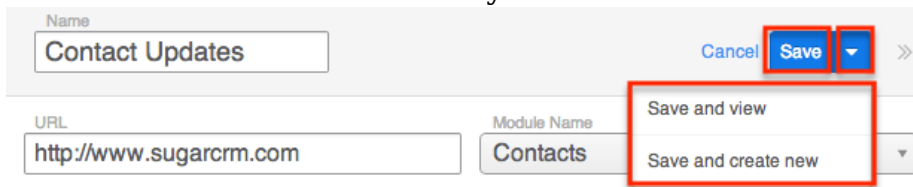
You can also create a new web logic hook by duplicating an existing web logic hook record. The Copy option is useful if the web logic hook you are creating has similar information to an existing web logic hook.

Use the following steps to create a web logic hook by duplicating an existing record:

1. Navigate to an web logic hook's record view.
2. Click the Actions menu and select "Copy".



3. The displayed record view is pre-populated with the original account's values. Update the necessary fields, then click "Save".
 - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.



Viewing Web Logic Hooks

There are various options available for viewing web logic hook records in Sugar including via Web Logic Hooks list view, Web Logic Hooks record view, and Web Logic Hooks Recently Viewed menu.

Viewing Via List View

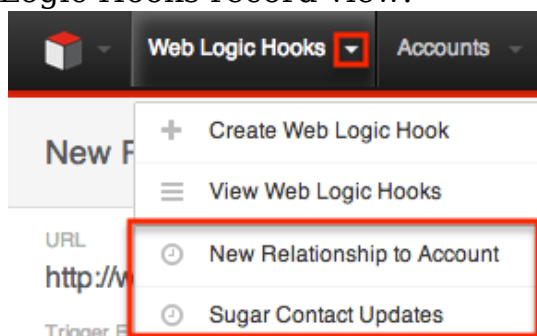
The Web Logic Hooks list view displays all account records meeting the current search criteria. To access the list view, simply click the Web Logic Hooks module tab. While list view shows key account fields, you can click the web logic hook's name to open the record view. For more information on viewing web logic hooks via list view, please refer to the [Web Logic Hooks List View](#) section of this documentation.

Viewing Via Record View

The Web Logic Hooks record view displays all the applicable fields for the record in question. The record view can be reached by clicking a web logic hook record's link from anywhere in the application including from the Web Logic Hooks list view. For more information on viewing web logic hooks via the record view, please refer to the [Web Logic Hooks Record View](#) section of this documentation.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which web logic hooks you have recently viewed. Click the Actions menu in the [Web Logic Hooks module tab](#) to see a list of your most recently viewed web logic hooks, and click each name to open the Web Logic Hooks record view.



Searching Web Logic Hooks

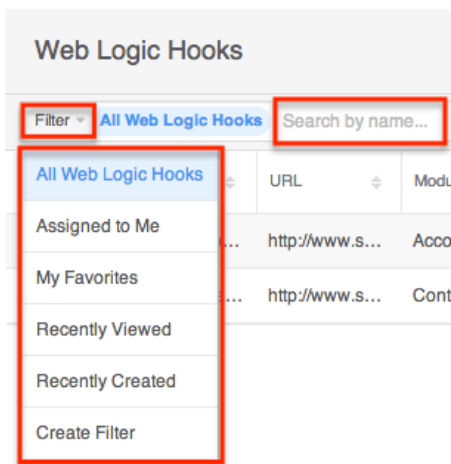
The Web Logic Hooks list view includes a module search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Web Logic Hooks list view below. Please note that Sugar automatically appends the wildcard 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.

Module Search

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

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



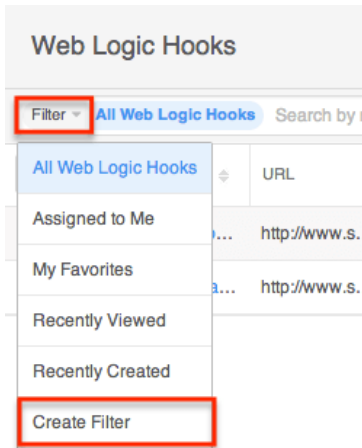
When you choose a filter and run a search, Sugar will return accounts with a matching name from within the filtered list view results. For example, if you select "My Favorites" in the Filter options and enter an account name, Sugar will only return account records with a matching name that are favorited by you. Once the search is complete, the relevant results will populate in the [list view](#) below the search bar. To see all account records to which you have access, simply select the All Web Logic Hooks option in the filter and remove any text from the search bar.

Creating a Filter

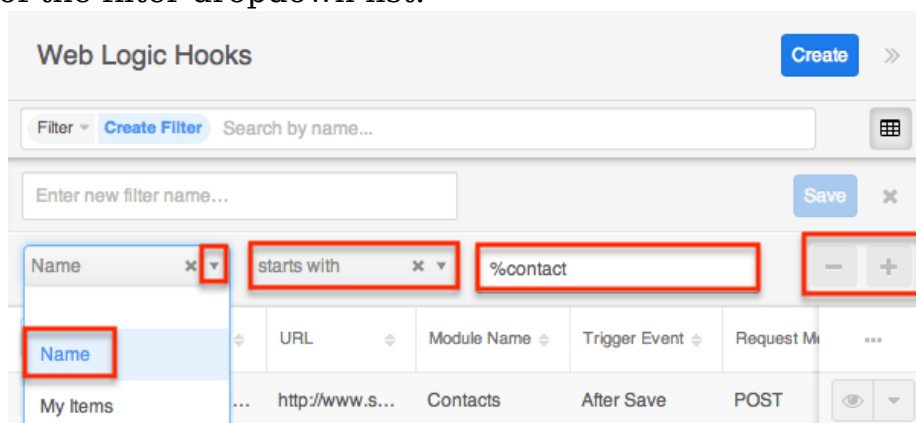
Users can also create new filters via the Create Filter option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the Web Logic Hooks list view. You have the option to add multiple fields to your new filter by clicking the Plus button to the right of the filter selection dropdown lists. Please note that each one of the filter's criteria need to be true for a record in order for it to appear in the list view search result.

The following steps cover creating a new search by Name filter as an example:

1. Click the Filter option on the Web Logic Hooks search bar then select "Create Filter".



2. Select the field you wish to add to your filter as well as the condition and matching criteria.
3. To add multiple fields to the new filter, click the Plus button to the right of the filter dropdown list.
 - o To remove fields from the new filter, click the Minus button to the right of the filter dropdown list.



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

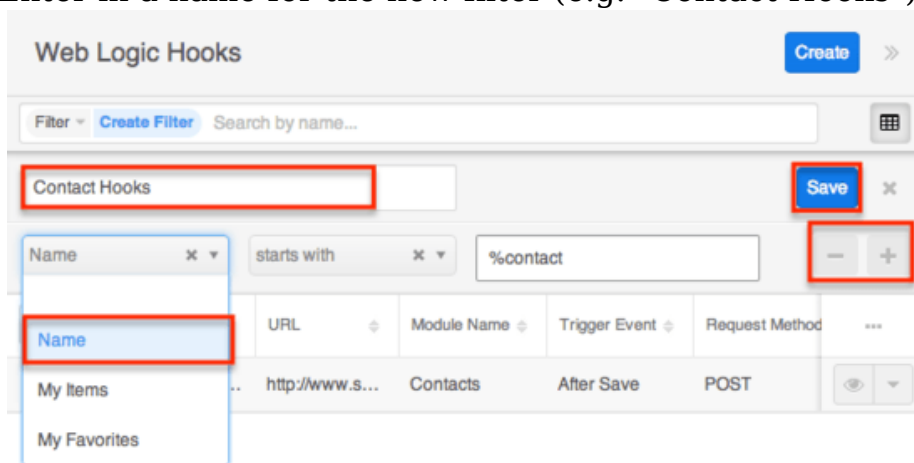
Saving a Filter

Once a user has created a new filter, they have the option of saving it. Doing so

will preserve the chosen fields as well as the conditions and values. The saved filter will then be available from the Filter dropdown menu in the module search bar to allow for easy retrieval of important sets of filters and values.

Use the following steps to save a new filter:

1. Create a [new filter](#) to perform a search on your desired fields.
2. Enter in a name for the new filter (e.g. "Contact Hooks").



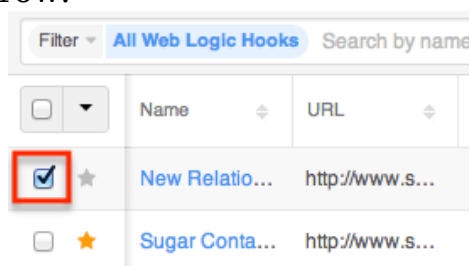
3. Click "Save" to add this filter and specified values to the module's Filter dropdown list.

Web Logic Hooks List View

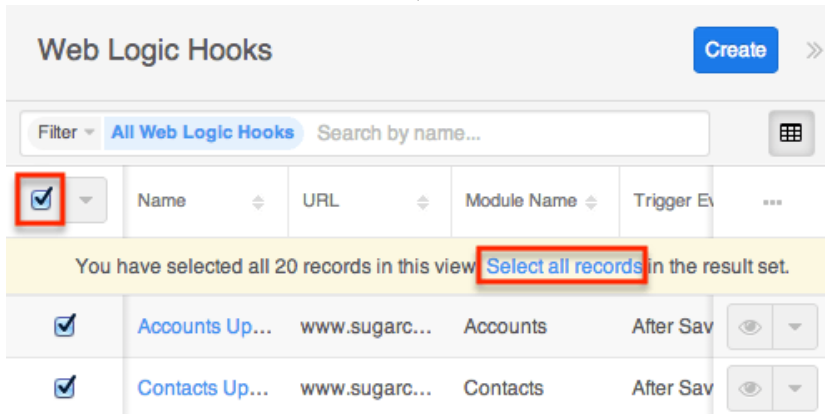
The Web Logic Hooks list view displays all account records meeting the current search criteria to which your user has access. You can view the basic details of each web logic hook within the field columns.

Checkbox Selection

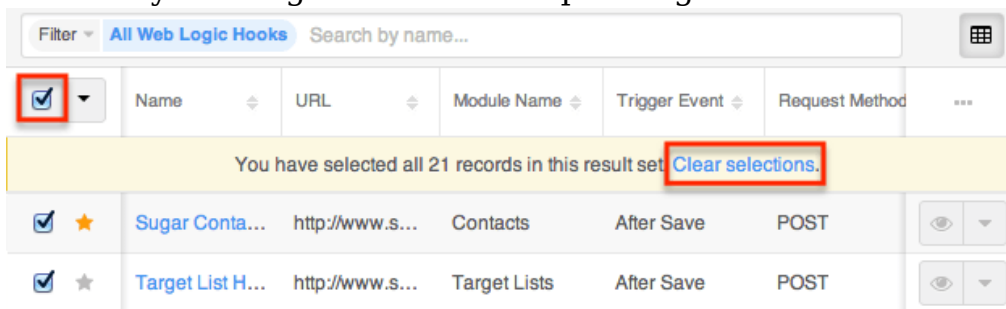
You can perform several actions on web logic hook records directly from the list view by first selecting the desired records. To select individual web logic hook records on the Web Logic Hooks list view, mark the checkbox on the left of each row.



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

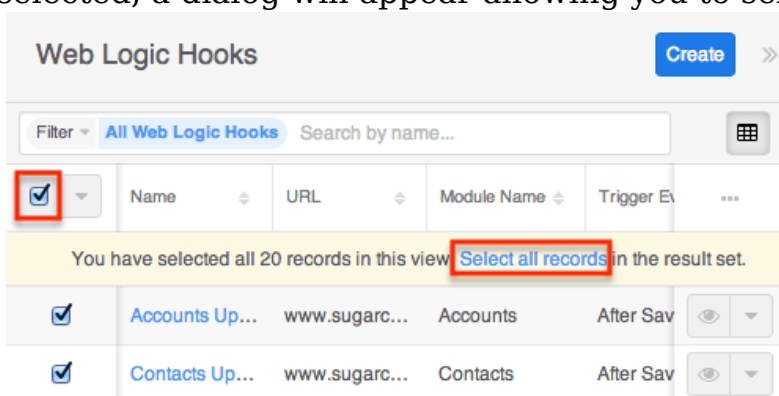


If you wish to clear the selection for all records on the list view result set, simply click "Clear selections" in the dialog. You can also clear the selections for all records by clicking the checkbox option again to remove the check marks.

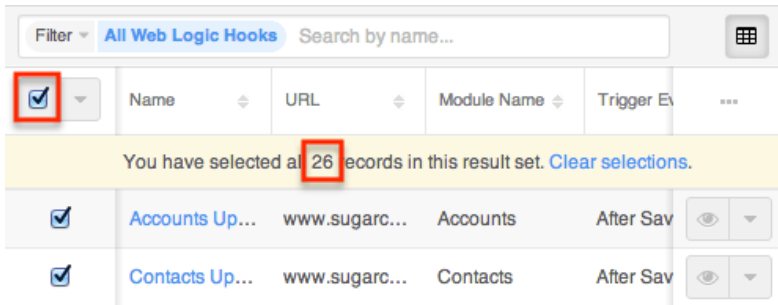


Total Record Count

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

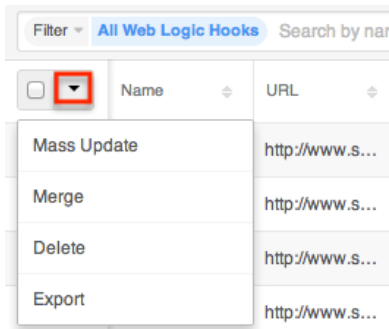


The total count of all records on the list view result set will appear in the dialog.



Mass Actions Menu

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



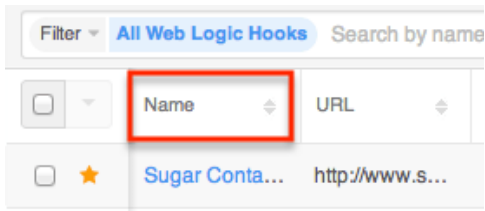
The options in the Mass Actions menu allow you to perform the following operations:

| Menu Item | Description |
|-----------------------------|---|
| Mass Update | Mass update one or more web logic hooks at a time |
| Merge | Merge two or more duplicate web logic hooks |
| Delete | Delete one or more web logic hooks at a time |
| Export | Export one or more web logic hooks to a CSV file |

Column Sorting

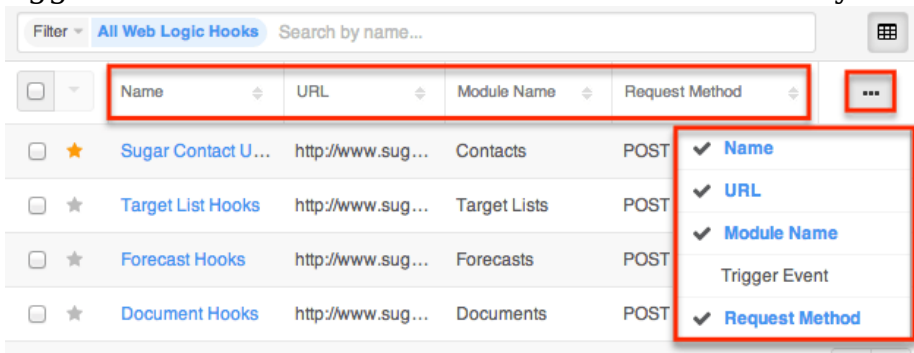
List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. Please note that the list view may be sorted by only one

column at a time.



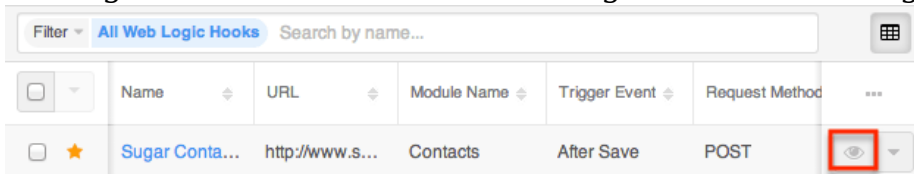
Column Selection

Sugar gives users the ability to personalize the list view by specifying which fields they want displayed. You can click the Column Selection icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column on your list view.

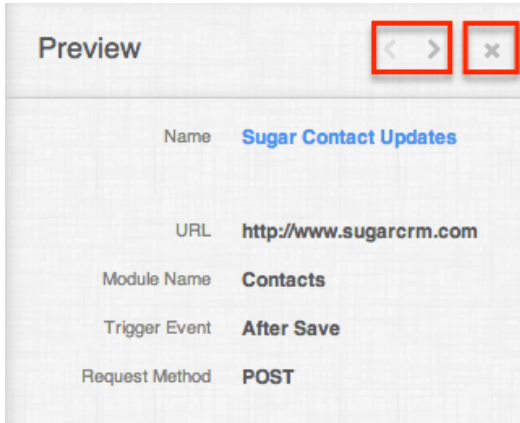


Preview

Users can view a record's details directly from the Web Logic Hooks list view by clicking the Preview icon to the far right of each web logic hook's row.

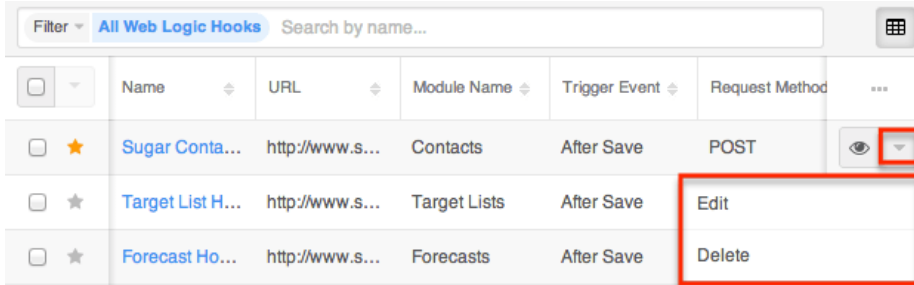


The record's data will display to the right of the list view providing key information. On the upper right of the intelligence pane, there is a Left and Right arrow button that allows you to scroll through the list view's current search results by previewing the next or previous record. To close the preview, simply click the "X" on the upper right of the intelligence pane.



Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to edit or delete specific records directly from the list view.



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

| Menu Item | Description |
|------------------------|----------------------------|
| Edit | Edit this web logic hook |
| Delete | Delete this web logic hook |

More Web Logic Hooks

The list view loads an initial number of records meeting the current search criteria with the option to show additional results at the user's request. By default, Sugar displays 20 records per list view results set, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide. To load the next set of list view results, simply click the More Web Logic Hooks link at the bottom of the list view.

| | | | | |
|---|---|----------------|-----------------|----------|
| <input type="checkbox"/> | ★ | Contact Rel... | http://www.s... | Contacts |
| <input type="checkbox"/> | ★ | New Relatio... | http://www.s... | Accounts |
| More web logic hooks... | | | | |

Right Hand Side Drawer

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

| Web Logic Hooks | | | | | | Create | >> |
|--------------------------|---|--------------|-----------------|---------|------------|--------|--------------------------|
| <input type="checkbox"/> | ★ | Report Hooks | http://www.s... | Reports | After Save | POST | <input type="checkbox"/> |
| <input type="checkbox"/> | ★ | Quote Hooks | http://www.s... | Quotes | After Save | POST | <input type="checkbox"/> |

Web Logic Hooks Record View

The Web Logic Hooks record view displays all information pertaining to the record in question. The record view can be reached by clicking an web logic hook record's link from anywhere in the application including from the Web Logic Hooks list view.

Actions Menu

The Actions menu on the top right of each web logic hook's record view allows you to perform various actions on the current record.

| Sugar Contact Updates | | Share |
|-------------------------|----------------|-----------------|
| URL | Module Name | Copy |
| http://www.sugarcrm.com | Contacts | View Change Log |
| Trigger Event | Request Method | Delete |
| After Save | POST | |

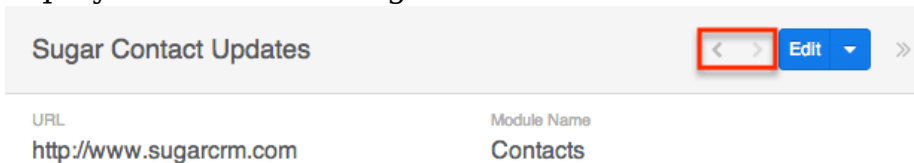
The options in the Actions menu allow you to perform the following operations:

border="1" cellspacing="1" cellpadding="4">

| Menu Item | Description |
|---------------------------------|---|
| Edit | Edit this web logic hook |
| Share | Share a link to this web logic hook via email |
| Copy | Duplicate this web logic hook |
| View Change Log | View a record of changes to this web logic hook |
| Delete | Delete this web logic hook |

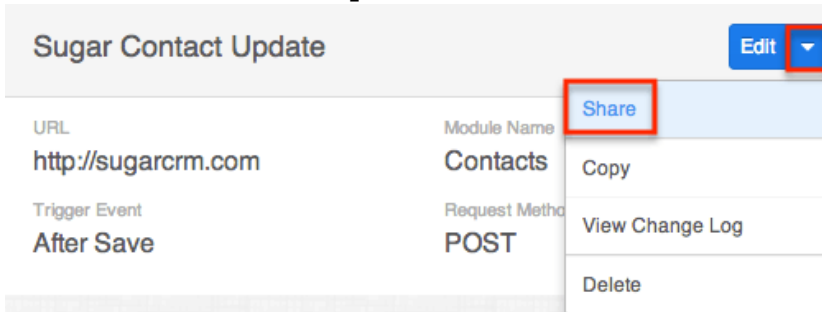
Next or Previous Record

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



Sharing Web Logic Hooks

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

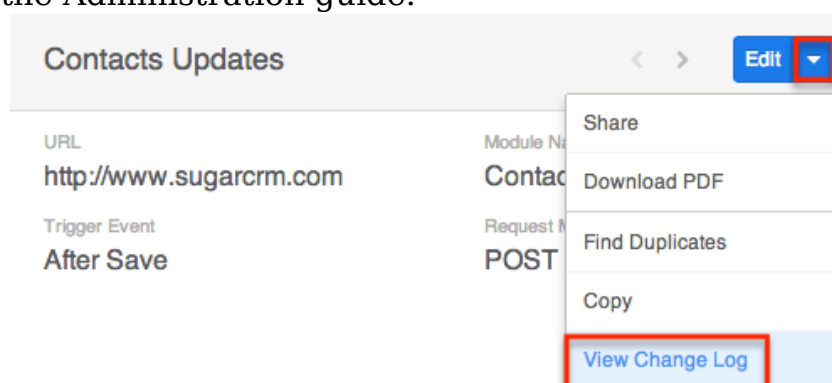


Users can simply click the link in the email to access the web logic hook record in Sugar. Please note that the user must be logged into Sugar in order to access the

record. Users will only be able to view the shared record as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide.

Viewing Web Logic Hook Change Logs

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



Once the change log opens, you can view the details of historical changes and can search by field name, old value, etc. by entering the keyword into the search box.

Editing Web Logic Hooks

Web Logic Hooks may be edited at any time to update or add information to the record. You can make changes to existing web logic hook records via the Web Logic Hooks record view and quick create forms. Record view is available within the Web Logic Hooks module and includes all of the Web Logic Hook fields you should need.

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

Administrators in Sugar may configure both the Web Logic Hooks record view and quick create via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#) documentation in the Administration guide.

Editing Inline Via Record View

Users can edit individual fields on a web logic hook's record view without entering the full edit mode by clicking the field name. Fields which are available for inline editing will display a pencil icon when hovering on the field name or value. This will allow users to type or select a new value. Click "Save" to preserve the changes made to the field.

The screenshot shows a record view for a web logic hook. At the top, there is a header "After New Contact is Saved" with "Cancel" and "Save" buttons. Below, the "URL" field is set to "https://sugarcrm.com". The "Module Name" field is a dropdown menu currently showing "Accounts". A red box highlights the "Save" button and the "Module Name" dropdown.

Editing Via Record View

You can edit web logic hooks via the [record view](#) by clicking the Edit button on the upper left of the page.

The screenshot shows the top of a record view for a web logic hook. The header is "Sugar Contact Updates" with an "Edit" button to its right. A red box highlights the "Edit" button.


Once the record view layout is open, update the necessary fields, then click "Save" to preserve the changes made.

The screenshot shows the full record view edit form. The "Name" field contains "Sugar Contact Updates". The "URL" field is "http://www.sugarcrm.com". The "Module Name" dropdown is set to "Contacts". The "Trigger Event" dropdown is set to "After Save". The "Request Method" dropdown is set to "POST". A "Save" button is highlighted with a red box.

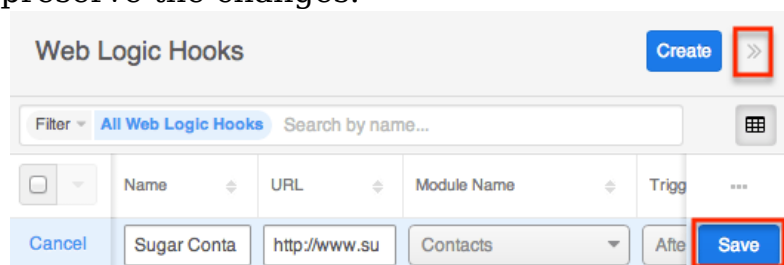
Editing Via List View

You can edit web logic hooks via the [list view](#) by clicking the triangle icon to the right of each web logic hook's preview and choose "Edit".

The screenshot shows a list view of web logic hooks. The table has columns for Name, URL, Module Name, Trigger Event, and an action menu. The first row is "Sugar Conta..." with URL "http://www.s...", Module Name "Contacts", and Trigger Event "After Save". The second row is "Sugar Acco..." with URL "http://www.s...", Module Name "Accounts", and Trigger Event "After Save". The third row is "Sugar Oppo..." with URL "http://www.s...", Module Name "Opportunities", and Trigger Event "After Save". A red box highlights the triangle icon in the action menu of the first row, and another red box highlights the "Edit" option in the dropdown menu.

| <input type="checkbox"/> | Name | URL | Module Name | Trigger Event | ... |
|--------------------------|----------------|-----------------|---------------|---------------|---|
| <input type="checkbox"/> | Sugar Conta... | http://www.s... | Contacts | After Save |  |
| <input type="checkbox"/> | Sugar Acco... | http://www.s... | Accounts | After Save | Edit |
| <input type="checkbox"/> | Sugar Oppo... | http://www.s... | Opportunities | After Save | Delete |

The web logic hook will become editable, inline as a shortened version of the record view layout. Click the double arrows to the right of the "Create" button to expand the editing window. Update the necessary fields, then click "Save" to preserve the changes.



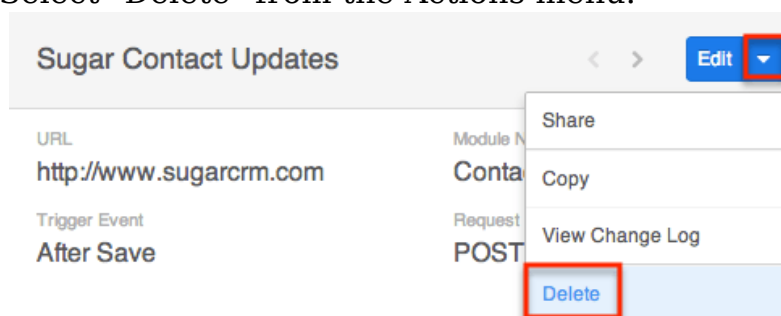
Deleting Web Logic Hooks

If a web logic hook record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Web Logic Hooks record view or list view. Deleting via the record view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Please note that your ability to delete web logic hooks in Sugar may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

Deleting Via Record View

Use the following steps to delete a web logic hook record via the record view:

1. Navigate to a web logic hook record's record view.
2. Select "Delete" from the Actions menu.

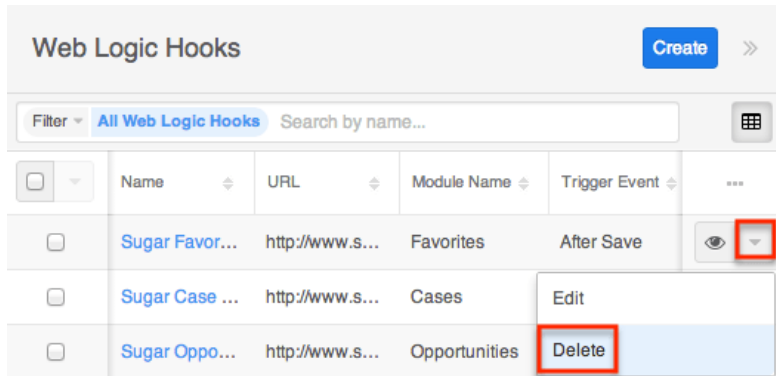


3. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

Deleting Via List View

Use the following steps to delete a specific web logic hooks via the list view:

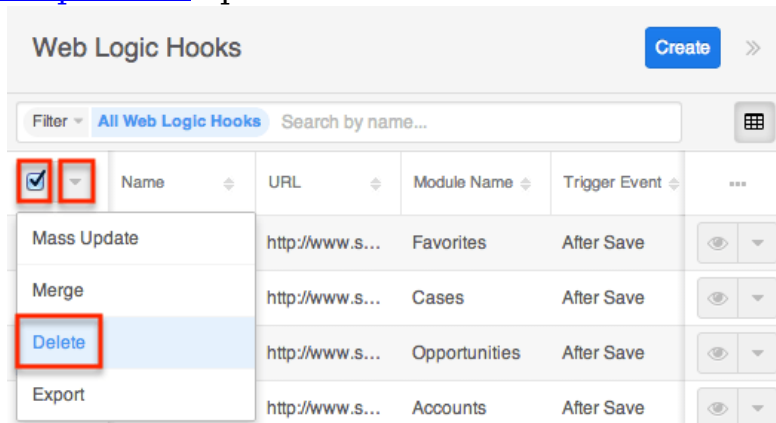
1. Navigate to the Web Logic Hooks list view by clicking the Web Logic Hooks module tab.
2. Use the [Module Search](#) to find the Web Logic Hook records you wish to delete.
3. Click the triangle to the right of the preview button of the web logic hook you want to delete.



Mass Deleting Via List View

Use the following steps to delete one or more web logic hook records via the list view:

1. Navigate to the Web Logic Hooks list view by clicking the Web Logic Hooks module tab.
2. Use the [Module Search](#) to find the Web Logic Hook records you wish to delete.
3. Select the desired web logic hook records individually or using the [Checkbox Dropdown's](#) options then choose "Delete" from the Actions menu.



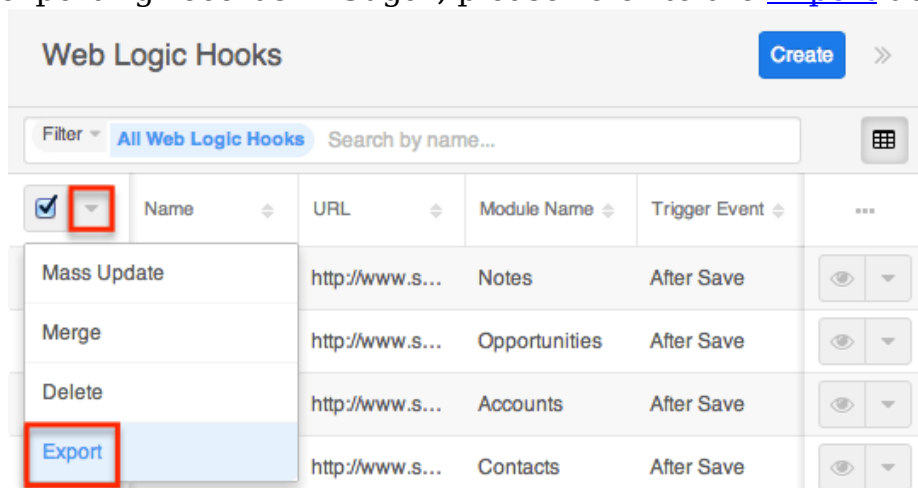
4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

You can also use the [Select All](#) feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to delete more than 1000 records or delete a specific group of records on the list view, please use the [filter option](#) in module search to perform the deletions in smaller batches.

Exporting Web Logic Hooks

Sugar's Export option allows users to download all fields for the selected web logic hooks to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Web Logic Hook data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered web logic hooks 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 web logic hook records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Web Logic Hooks may be exported from the Web Logic Hooks list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for web logic hooks 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.



Mass Updating Web Logic Hooks

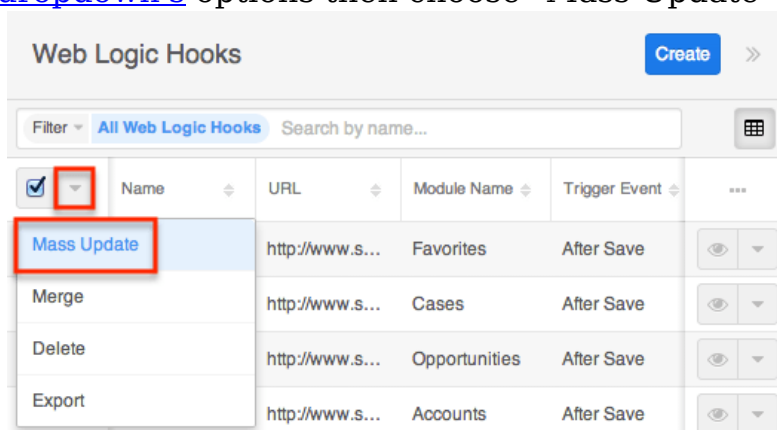
Mass Updating allows users to make the same change to multiple web logic hook records at once from the Web Logic Hooks list view. Users with administrator or developer level access can control which fields are available to change during

mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the [Studio](#) documentation in the Administration guide. You can use the [Select All](#) feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to update more than 1000 records or update a specific group of records on the list view, please use the [filter option](#) in module search to perform the updates in smaller batches.

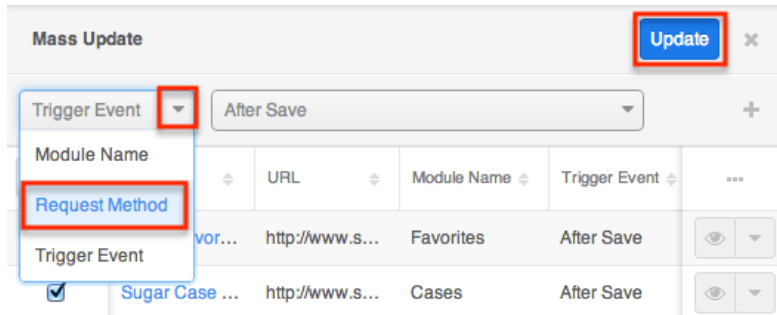
Please note that your ability to mass update web logic hooks may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

Use the following steps to mass update web logic hook records from the list view:

1. Navigate to the Web Logic Hooks list view by clicking the Web Logic Hooks module tab.
2. Use the [Module Search](#) to identify Web Logic Hook records you wish to modify.
3. Select the desired web logic hooks individually or using the [checkbox dropdown's](#) options then choose "Mass Update" from the Actions menu.



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



5. Click "Update" to save the changes to all of the currently selected web logic hook records.

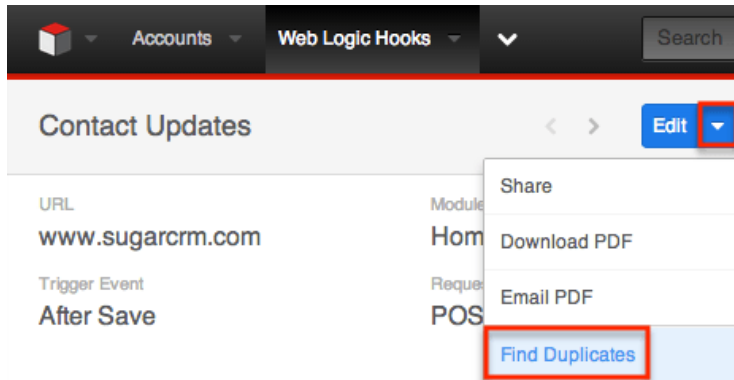
Finding Duplicate Web Logic Hooks

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

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

Use the following steps to locate duplicate web logic hooks using the Find Duplicates option from the Web Logic Hooks record view:

1. Navigate to an web logic hook's record view.
2. Choose "Find Duplicates" from the Actions menu.



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

Once you click "Merge Duplicates", the merging process with the current record will begin. For instructions on performing the merge that follows, please refer to Steps 3-9 of the [Merging Via List View](#) section of this documentation.

Merging Web Logic Hooks

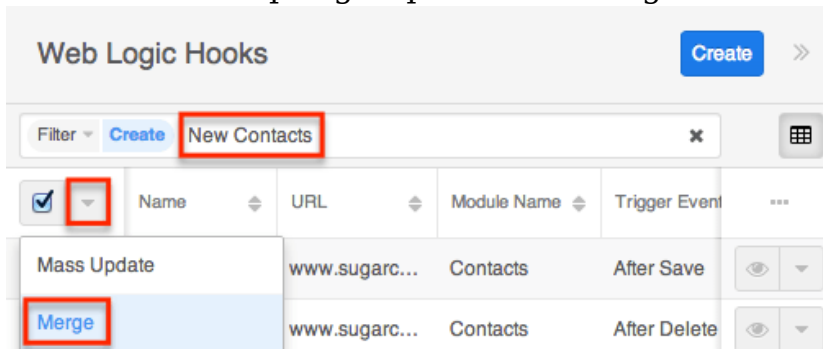
When duplicate records are identified in Sugar, you have the option to merge two or more web logic hooks into a single record. Once the merge is complete, the duplicate web logic hook record(s) will be deleted, and the primary record will remain. Please note that all relationships belonging to the duplicate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

Merging Via List View

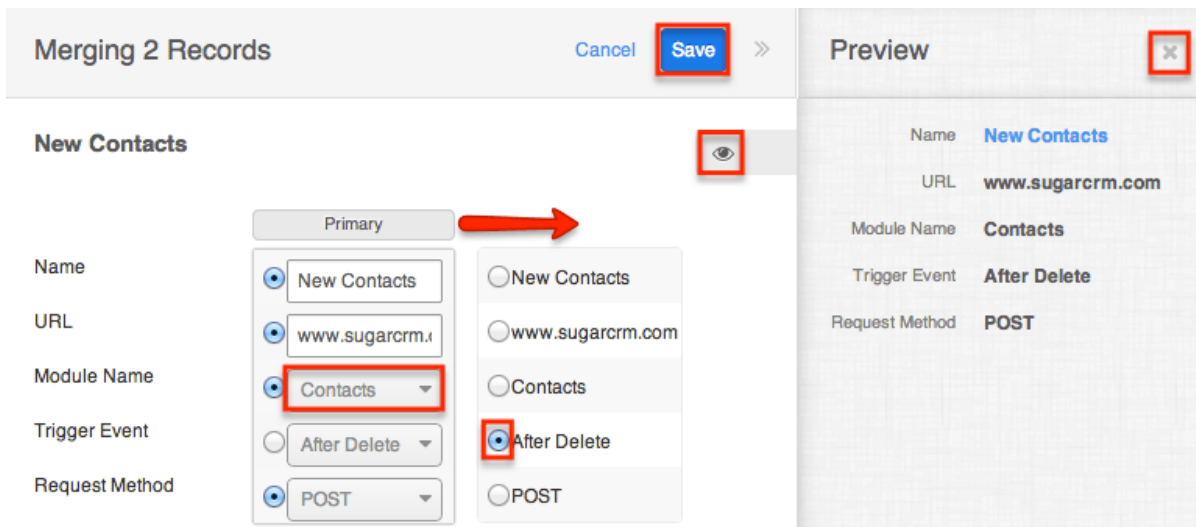
[Module Search](#) may be used to identify duplicate web logic hooks by, for example, searching for records with similar names. Once your search has identified duplicate [account]s, you can merge them directly from the Web Logic Hooks list view.

Use the following steps to merge web logic hooks via the list view:

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



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



4. To change which record is considered the primary, drag and drop the Primary label on the top of a different column.
5. Review the field values in each column and click the radio button to the left of the value that should appear on the final record. You can also manually type or select a new value for any field as necessary.
6. Preview what the final, merged record will contain as you work by clicking the eye icon to display the preview in the Intelligence Pane.
7. Click "Save" once all fields you wish to appear on the single, merged record have their radio buttons selected.
8. A pop-up message will display confirming that the duplicate record(s) should

be deleted. Click "Confirm" to proceed.

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

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. 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).

Toggle All Options

| | | | |
|------------|--|--------------|--|
| 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> | | |

Related Contacts Emails

The Related Contacts Emails section allows administrators to enable or disable related contact's emails from appearing in the Emails subpanel and History dashlet for certain modules (Cases, Accounts, Opportunities). In order to have emails from related contacts appear in the Emails subpanel, simply mark the checkbox to the right of the module name (e.g. Opportunities). To disable related contact's emails from appearing in the Emails subpanel, uncheck the box for the specific module as necessary. Click "Save" to preserve the change.

Enable/Disable emails from related (or linked) contacts to show in Email Subpanel.:

| | | | |
|----------------|-------------------------------------|-----------|--------------------------|
| Cases: | <input type="checkbox"/> | Accounts: | <input type="checkbox"/> |
| Opportunities: | <input checked="" type="checkbox"/> | | |

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

Value of Config.php s

Keep copies of campaign messages: * Yes No

Make any necessary changes and click "Save" to commit the changes.

Email Archiving

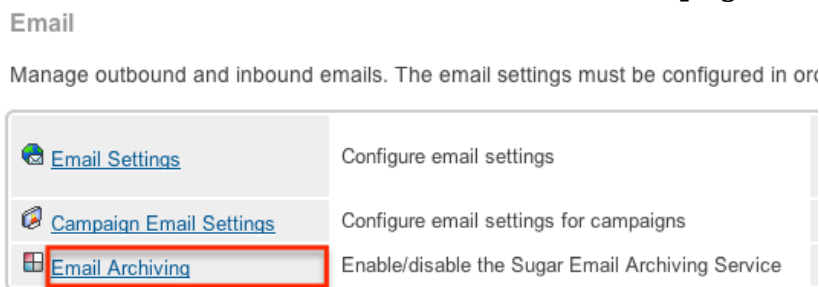
Sugar Email Archiving allows users to easily archive email to Sugar records simply by sending the email to a special email address. The email archiving service monitors the email address and imports the email into your instance of sugar and links related records without the use of a plug-in or other 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".

I agree to the above terms and the [privacy agreement](#).

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 publicly 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. In addition, the Sugar Email Archiving service will also scan the body of the email to archive the email to records with a matching email address. Please note

that in order for the email address to be recognized properly for email archiving, it must be displayed as "To: (End Client Name (optional)) " (e.g. To: John Smith john@example.com>) in the body of the email. The archived email will appear in the History dashlet for any matching records in Sugar.

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 the 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.

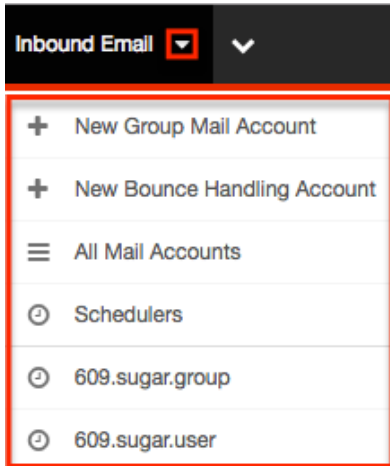
| Field | Description |
|--|--|
| Allow users to send emails using the "From" Name and Address as the reply to address | Select this option if you want to enable users to use this account's From name and address as their Reply To address. Only available for Group Accounts and defaults to not checked. |
| 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 page. Once in the Inbound Email list view, click the triangle in the Inbound Email module tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The [Recently Viewed menu](#) displays the list of 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.

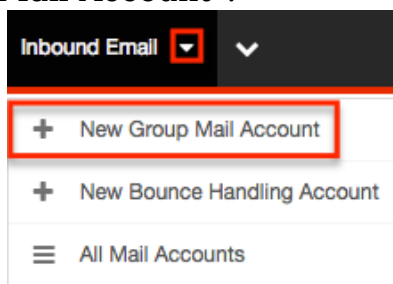
- Note: Group Mail Accounts will only import unread messages from the mail server.
- Bounce Handling Mail Accounts : Stores campaign emails that bounce back to you due to incorrect email addresses. You can create a bounce handling inbox separately for each campaign, or you can create one that is common 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

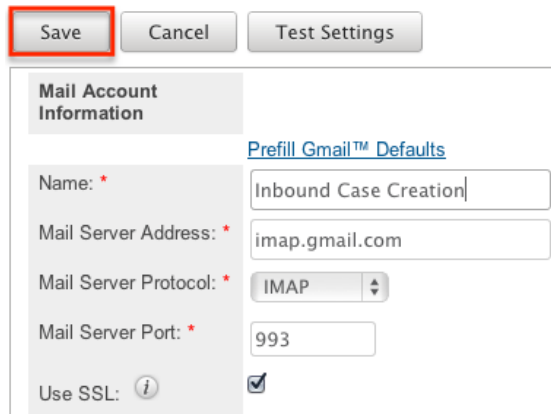
One of the most common methods of Group Mail Account creation is via the New Group Mail Account option in the Inbound Email module tab. This opens up the edit view layout which allows you to enter in all the relevant information for the group mail account. Please note that Group Mail Accounts will only 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. Click the triangle in 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".



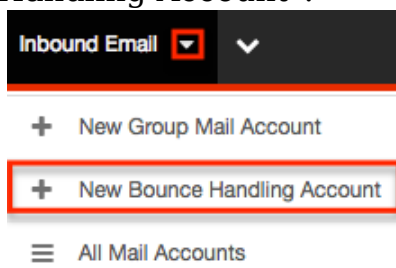
Optionally, click "Test Settings" to verify your entries.

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. Click the triangle in the Inbound Email module tab and select "New Bounce Handling 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".

Save Cancel Test Settings

Mail Account Information

[Prefill Gmail™ Defaults](#)

Name: * Campaigns Bounce Account

Mail Server Address: * imap.gmail.com

Mail Server Protocol: * IMAP

Mail Server Port: * 993

Use SSL:

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 Copy option is useful if the inbound email account you are creating has similar information to an existing inbound email account.

Use the following steps to create an inbound email account by duplicating an existing record:

1. Navigate to an inbound email account record's detail view.
2. Click "Copy".

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Edit Copy Delete

Mail Account Information

| | |
|----------------------|-----------------|
| Name: | 609.sugar.group |
| Mail Server Address: | imap.gmail.com |

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

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Save Cancel Test Settings

Mail Account Information

[Prefill Gmail™ Defaults](#)

Name: * Inbound Case Creation

Mail Server Address: * imap.gmail.com

Mail Server Protocol: * IMAP

Mail Server Port: * 993

Use SSL:

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

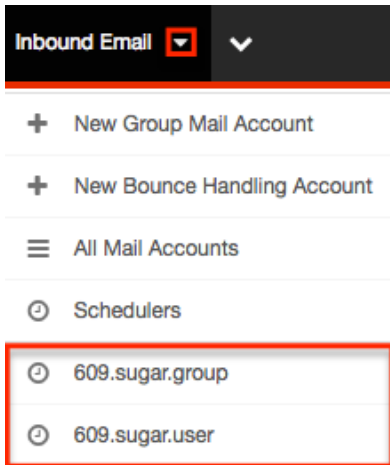
The Inbound Email list view displays all inbound account records. To access the list view, simply click the Inbound Email module tab. While list view shows key inbound account fields, you can click the account's name to open the record in detail view. For more information on viewing inbound accounts 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. Click the triangle in the [Inbound Email module tab](#) to see a list of the 3 records you most recently viewed in the module. Clicking the record's name within the list will open the record 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 the 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

A screenshot of a configuration field for the Case Macro. At the top left, there is a 'Save' button with a red border. Below it, the field is labeled 'Case Macro:' and contains the text '[TICKET NUMBER:%1]' in a light grey box. To the right of the box, there is a small text block: '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.

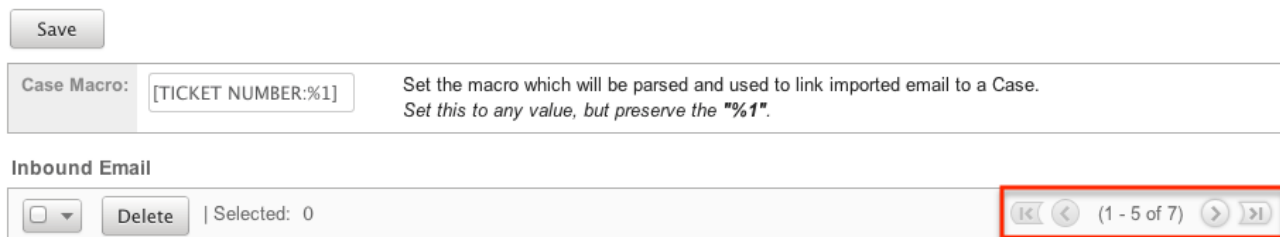
Note: Incoming emails must have no space before the case number in order to be related to the existing case. For example, an email with the subject "[Case:1234]" will automatically be related to case number 1234 while an email with the subject "[Case: 1234]" will not.

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.

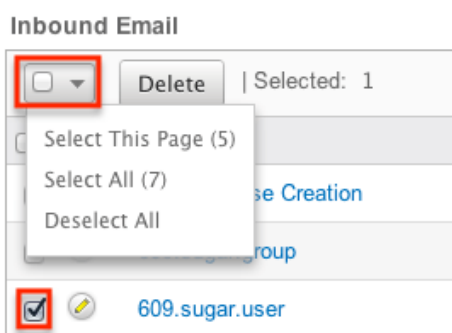
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.



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:

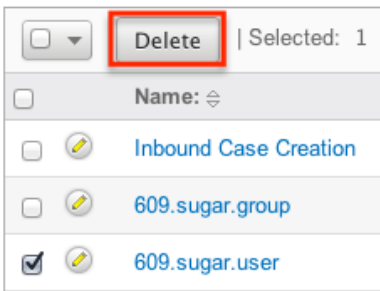
- Select This Page : Selects all records shown on the current page of inbound account results.
- Select All : Selects all records across all pages of inbound account results.
- Deselect All : Deselects all records that are currently selected.



Action Buttons

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

Inbound Email



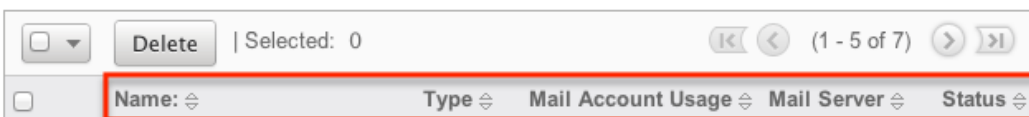
The only action available from the Inbound Email list view is the following operation:

| 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



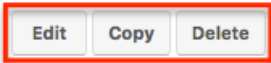
Inbound Email Detail View

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.

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| Mail Account Information | |
|--------------------------|-----------------|
| Name: | 609.sugar.group |
| Mail Server Address: | imap.gmail.com |

The action buttons allow you to perform the following operations:

| Menu Item | Description |
|------------------------|---------------------------------|
| Edit | Edit this inbound account. |
| Copy | 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

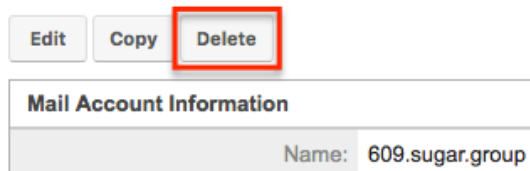
If an inbound account record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Inbound Email detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records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

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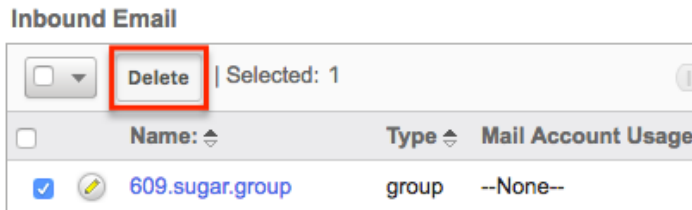


3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

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](#) documentation 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.

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](#) ?

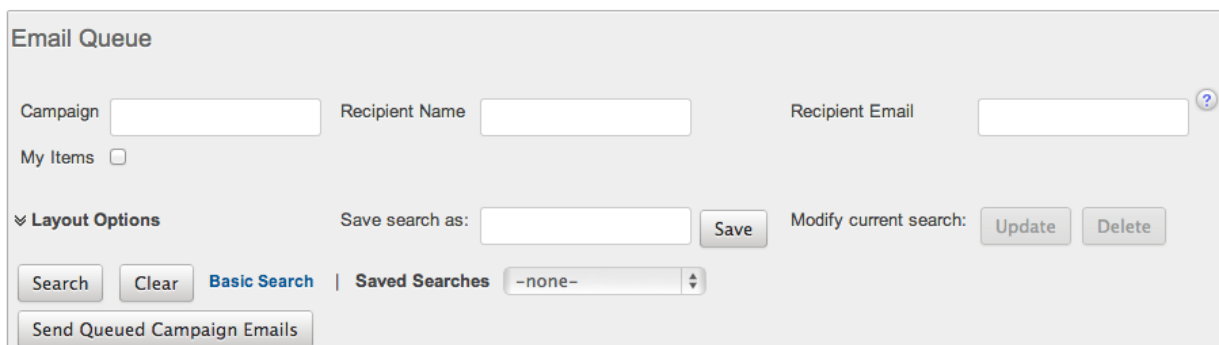
Once the search is complete, the relevant results will populate in the list view below the search panel. To see all queued email records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters.

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.
- 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.

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.

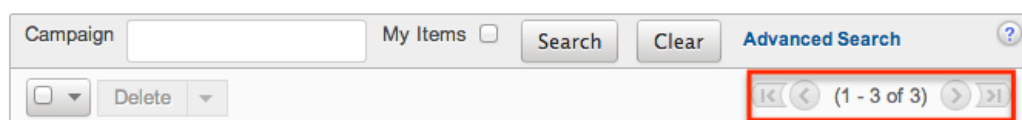
You have the option to change what fields are displayed in list view by configuring your layout options in the Advanced Search. For more information on configuring your list view, please refer to the [Layout Options](#) section of the Search documentation.

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

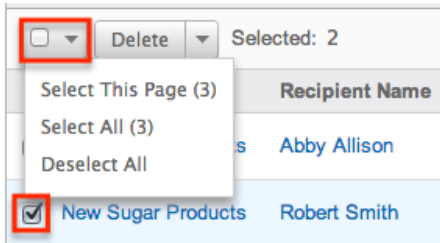


Checkbox Selection

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.

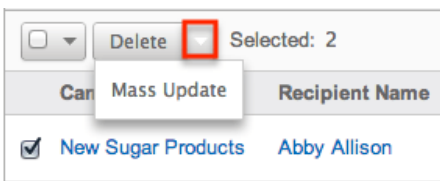
To select or deselect multiple queued email records on the list view, use the options in the checkbox dropdown menu:

- **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.

| Campaign | Recipient Name |
|---|----------------|
| <input type="checkbox"/> New Sugar Products | Abby Allison |

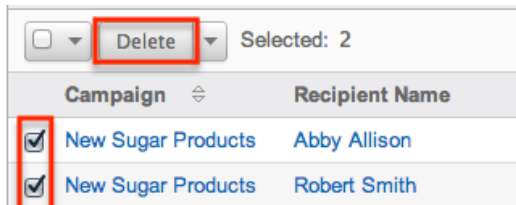
Deleting Queued Email

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.

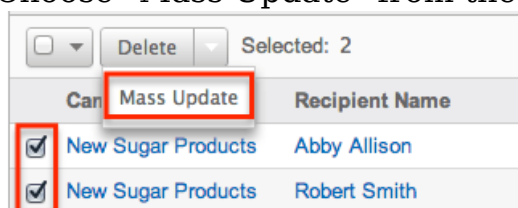
Mass Updating Queued Email

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.

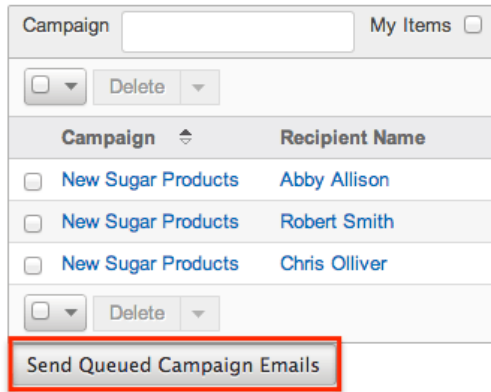
Sending Queued Email

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: 02/02/2017 12:46pm

Developer Tools

Overview

The Developer Tools section of Sugar's Admin page contains various configuration menus that help you customize your instance to best suit your organization's needs. Developer Tools allows 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 |
| Sugar Portal | Configure your Sugar Portal |
| Dropdown Editor | Manage dropdown lists to add new lists or edit existing lists |
| Rename Modules | Update the name of each module within Sugar |
| Display Modules and Subpanels | Hide or display modules and subpanels across the application |
| Configure Navigation Bar Quick Create | Configure which modules appear in the Quick Create menu on the navigation bar |
| Workflow Management | Manage automated processes in Sugar to optimize and streamline your company's business process |

Studio

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. Please note that only users with administrator or developer access have the ability to make changes via Admin > Studio. For more information on how to utilize Studio, please refer to the [Studio](#) documentation.

Module Builder

Module Builder enables administrators to create, deploy, and maintain custom modules in Sugar. For your convenience, the custom modules are based on templates such as Basic, Person, Company, etc. Modules can then be deployed within your instance of Sugar so that users can utilize the new module in their daily process. In addition, modules can be exported for additional development or published and then imported to other Sugar instances. For more information on

using Module Builder, please refer to the [Module Builder](#) documentation.

Module Loader

Module Loader is used to import deployable packages into Sugar to make changes to core files. Examples of module loadable packages are 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 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](#) documentation.

Sugar Portal

Sugar Portal is a powerful tool which allows Sugar users to interact with customers and share information related to multiple modules. Your customers can log into the portal and view information in your Sugar instance as well as submit ,

Dropdown Editor

The Dropdown Editor allows administrators to view, modify, and create dropdown lists which can be added as fields in Sugar. Since dropdown lists are not module specific, they are stored and managed through the Dropdown Editor. Please note that the dropdown list can only be associated to a Dropdown, Multiselect, and Radio type field via Admin > Studio. For more information on associating dropdown lists to the different field types, please refer to the [Studio](#) documentation.

You can restrict which dropdown values are available to users based on their roles. For more information about role-based visibility, please refer to the [Editing Role-Based Availability](#) section of this page.

Note: Certain dropdown lists cannot be edited via the Dropdown editor as they are controlled by a separate area (e.g. Contract Types, Releases, etc.) of the Admin page. These include dropdown lists for the [Forecasting](#), [Bug Tracker](#), [Contracts](#), and [Products and Quotes](#) modules. Please refer to the appropriate sections of the Administration guide for more information regarding the fields and how they can be edited.

Adding Dropdown Lists

Dropdown lists can be created at any time and added to a Dropdown type field via

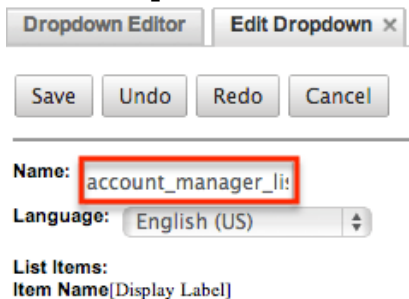
If desired, you can restrict which dropdown values are available to users based on their roles. For more information about role-based visibility, please refer to the [Editing Role-Based Availability](#) section of this page.

Use the following steps to create a dropdown list via Dropdown Editor:

1. Navigate to Admin > Dropdown Editor.
2. Click the Add Dropdown button above the list of existing dropdown lists.



3. Enter in a name for your dropdown list on the Name field (e.g. "account_manager_list").
 - Note: The name must be alphanumeric and use the underscore character for spaces.



4. To create the items that will appear in your dropdown list, enter an "Item Name" and a "Display Label". Click "Add" once you have populated both fields to add the value to the dropdown list.
 - The item name is the backend system name for the list item and must be alphanumeric. An underscore or a period can be used for the item name.
 - The display label defines what will be displayed within the actual dropdown. Please note that there is no character restrictions when entering the display label. Click "Add" once you have populated both fields to add the value to the dropdown list.

List Items:
Item Name[Display Label]

-

Item Name: **Display Label:**

5. Once all values have been added to your dropdown list, you can click one of the sort options to rearrange the values as desired. Lists can be sorted alphabetically in ascending or descending order based on the display label. You can also sort the list manually by dragging and dropping the values up-and-down the list.

Item Name: **Display Label:**

6. Click "Save" at the top of the screen to complete and add your dropdown list. You will be directed back to the main dropdown editor page once the save completes.

Dropdown Editor **Edit Dropdown** ×

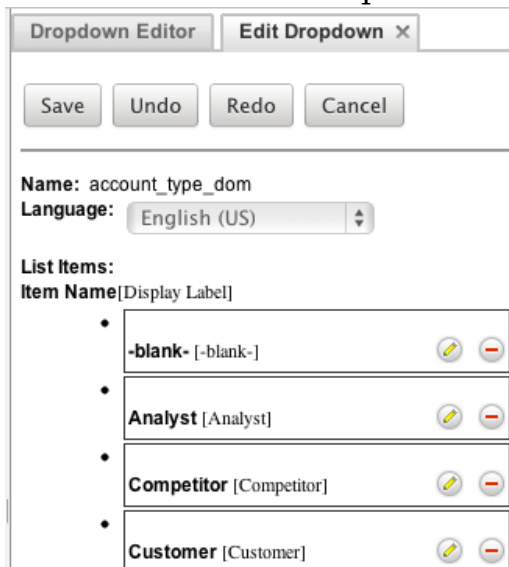
Name:

Viewing Dropdown Lists

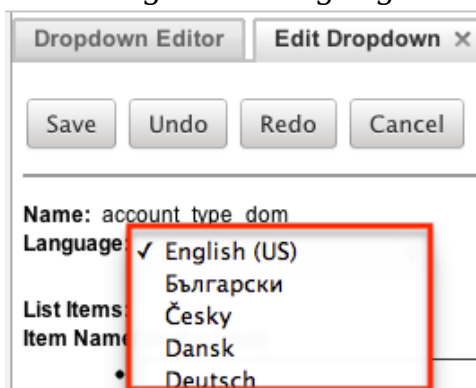
The Dropdown Editor displays all existing dropdown lists in two separate sections (Dropdowns list, Dropdown Editor) on the page. The Dropdowns list to the left of the page displays the dropdown lists in alphabetical order. The Dropdown Editor tab displays the dropdown lists in columns and allows you to view more of the lists at once instead of scrolling down a single list.

The screenshot shows the 'Dropdowns' list on the left, containing items like 'Elastic_boost_options', 'account_manager_list', 'account_type_dom', 'activity_dom', 'available_language_dom', 'bopselect_type_dom', 'bselect_type_dom', 'bug_priority_dom', and 'bug_resolution_dom'. The 'Dropdown Editor' tab on the right shows a detailed view of a dropdown, including an 'Add Dropdown' button and a list of items: 'Elastic boost options', 'activity_dom', 'bselect_type_dom', 'bug_status_dom', 'call_status_dom', and 'campainglog_activity_type c'.

Once you locate the dropdown list you are looking for, click the list's name to open the Edit Dropdown tab where you can view and edit the list. The Edit Dropdown tab displays the name, language dropdown, and the list of item names and display labels. The list's order here matches the order they will be displayed when using the dropdown in Sugar records. Reorder the list by dragging and dropping the items into the desired positions.



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

Dropdown lists can easily be modified via the Dropdown Editor by selecting the specific dropdown list which opens the edit layout. You can reorder the items in the list, add new values, remove unnecessary values, change the display label of a value, or change the display label language.

If desired, you can restrict which dropdown values are available to users based on their roles. For more information about role-based visibility, please refer to the [Editing Role-Based Availability](#) section of this page.

Please note that the name of the dropdown list cannot be changed once created. Also, dropdown lists cannot be deleted since they can span multiple modules in Sugar and cause important data to be lost if removed in error. Once the necessary modifications have been made, click "Save" on the upper right to preserve the changes made.

To sort the list alphabetically, you can simply click the Sort Ascending or Sort Descending button on the bottom left of the tab view. Please note that the sorting is based on the display label. You can also reorder the items in your list, by dragging and dropping the items into the desired position.

The screenshot shows the 'List Items' section of the Dropdown Editor. It features a list of items with the following structure:

| Item Name [Display Label] |
|---------------------------|
| • -blank- [-blank-] |
| • Analyst [Analyst] |
| • Customer [Customer] |
| • Competitor [Competitor] |
| • Integrator [Integrator] |
| • Investor [Investor] |
| • Partner [Partner] |
| • Press [Press] |
| • Prospect [Prospect] |
| • Reseller [Reseller] |
| • Other [Other] |



Annotations in the image include:

- A red box around the 'Customer [Customer]' item with an arrow pointing to it and a text box that says: "Drag the item up or down the list then drop it into the desired position."
- Red boxes around the 'Sort Ascending' and 'Sort Descending' buttons at the bottom left.

At the bottom of the list, there are input fields for 'Item Name:' and 'Display Label:', an 'Add' button, and the two sorting buttons.

To add a new value, enter in an item name and corresponding display label below the list of existing values then click "Add". Please note that the item name is the back-end system name and must be alphanumeric without any special characters other than an underscore or a period. The text in the display label defines how the value will be displayed in the dropdown list when viewed in the user interface. Please note that there is no character restriction for the display label.





List Items:
Item Name[Display Label]

- j_kelly [Joseph Kelly]  

Item Name: **Display Label:**




To remove a value from the list, click the Minus icon to the far right of the item row. Once deleted, the item will show a strike through and will be removed from the list once saved.

List Items:
Item Name[Display Label]

- ~~j_kelly [Joseph Kelly]~~  
- ~~w_westin [Will Westin]~~  

The item name of a dropdown value cannot be edited, but you can update the display label via the Dropdown Editor. Simply locate the value in the list then click the Pencil icon to the far right of the item row. Enter in the new value into the open text box then click anywhere on the page to close the edit.

List Items:
Item Name[Display Label]

- w_westin  
- j_kelly [Joseph Kelly]  

Editing Sales Stages

The Revenue Line Items module contains two fields that function unlike other fields in Sugar. When the Sales Stage dropdown field is updated, the corresponding probability is automatically populated in the Probability (%) field. This is a unique function to the Revenue Line Items module. These two fields use the two dropdown lists, "sales_stage_dom" and "sales_probability_dom". Both dropdown lists have the same item name for all values but different display labels. The sales_stage_dom list is associated to the Sales Stage field and displays the various sales stages (e.g. prospecting, qualification, closed won, etc.). The sales_probability_dom list is associated to the Probability (%) field and displays the corresponding probability value (e.g. 10, 20, 100, etc.) for each sales stage.

When any changes are made to the sales_stage_dom list, you must consider the

sales_probability_dom list as well to ensure the relationship between the two fields remain intact. For example, if you add a new sales stage (e.g. Item Name: "review_stage", Display Label: "Review Stage") to the sales_stage_dom list then you must add a corresponding probability (e.g. Item Name: "review_stage", Display Label: "50") to the sales_probability_dom list in order for it to populate properly in the revenue line item. The two lists' item names and order must match.

The Opportunities module's Status field uses the sales_status_dom list . Modifying this list is not recommended as the values in this dropdown are tied to the Revenue Line Item module's Sales Stage field. Making changes to this dropdown list's item names via code or Studio can cause unexpected behavior. For more information regarding the Status field, please refer to the [Opportunities](#) documentation.

Note: The dropdown lists "sales_stage_dom" and "sales_probability_dom" must have "Closed Won" and "Closed Lost" as item names in order for the Forecasts module to function correctly. Please ensure any changes to these lists does not remove or change the item name for these two options.

For sales_stage_dom list:

Name: sales_stage_dom
Language:

List Items:

| Item Name | Display Label |
|-------------------|-------------------|
| Prospecting | Prospecting |
| Qualification | Qualification |
| Needs Analysis | Needs Analysis |
| Value Proposition | Value Proposition |

For sales_probability_dom list:

Name: sales_probability_dom
Language:

List Items:

| Item Name | Display Label |
|-------------------|---------------|
| Prospecting | [10] |
| Qualification | [20] |
| Needs Analysis | [25] |
| Value Proposition | [30] |

For sales_status_dom list:

Name: sales_status_dom
Language: English (US)

List Items:

| Item Name | Display Label |
|-------------|---------------|
| New | New |
| In Progress | In Progress |
| Closed Won | Closed Won |
| Closed Lost | Closed Lost |

Users can create similar logic for custom fields using Sugar Logic 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:

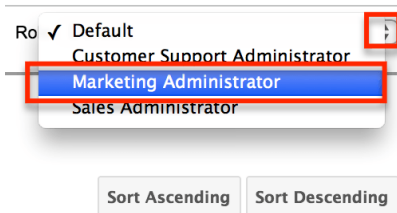
| Item Name | Display Label |
|-----------|---------------|
| 0 | 0 hours |
| 7200 | 2 hours |
| 14440 | 4 hours |

Editing Role-Based Availability

You can restrict which options are available for a user to select when he or she is editing records based on the user's role. When editing a particular dropdown list, the Roles dropdown appearing on the top right contains all existing roles in the Sugar application. The Default role-list allows admins to add, remove, or reorder options within a dropdown list. By default, none of the other Sugar roles have customized lists, so changes made to the Default role-list will automatically be copied to the other role-lists upon save. This means that as long as no role-list are customized here, all users will continue to see the dropdown options and order matching the Default role-list.

Note: It is recommended to assign each user to a maximum of one role. Users belonging to multiple roles which each have customized role-views may experience unexpected behavior when using record views. For more information about roles, please refer to the [Role Management](#) documentation.

If you wish to restrict certain roles to use a modified list of options when editing records, select the desired role from the Roles dropdown to make changes specific to that role (e.g. Marketing Administrator).

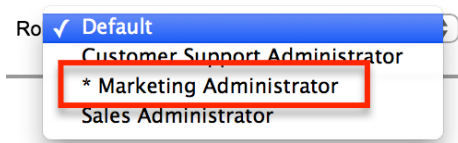


When viewing a Sugar role's role-list (e.g. Marketing Administrator), you have the option to disable, enable, or reorder the existing options. Options cannot be added or deleted via any role-list except "Default". Drag and drop an option in order to change its position in the role-list's options list. To disable an option, uncheck the box on the right of the option's row. Doing so will prevent the option from appearing in the dropdown when a user belonging to this role is editing or creating a record. Once an option is disabled, it will appear greyed out with a strike-through. When the desired changes have been made, click "Save & Deploy". Note: Each role's role-list must have at least one enabled option.

| | |
|--------------------------------------|-------------------------------------|
| Analyst [Analyst] | <input checked="" type="checkbox"/> |
| Competitor [Competitor] | <input checked="" type="checkbox"/> |
| Customer [Customer] | <input type="checkbox"/> |
| Custom Type [Custom Type] | <input checked="" type="checkbox"/> |

Once you have saved and deployed a modification to a role-list, it is considered customized and will display an asterisk (*) next to the role's name in the Roles

dropdown. Reordering options on the Default role-list will no longer have any affect on customized role-lists. However, adding an option, deleting an option, or changing an option's display label on the Default role-list will add, remove, or alter the option for all role-lists including customized role-lists.



Note: Users will be able to view all dropdown values regardless of role restrictions when viewing records. This means if a record has a dropdown value set to which a user has a role-based restriction, he or she will still be able to view the value.

Note: Role-based customizations to dropdown lists are included when exporting customizations from Studio. For more information, please refer to the [Studio](#) and documentation.

Rename Modules

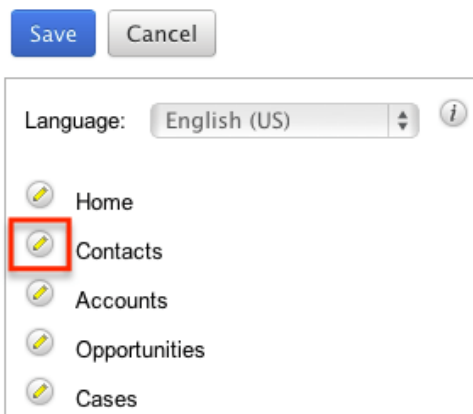
Depending on your business needs, it may be necessary to alter the display label to make the module's name (e.g. Contacts, Accounts, etc.) align to your various business components. Administrators can easily rename modules via Admin > Rename Modules. When editing a name, you are given the option to update both the singular and plural version of the word. This change will be reflected globally across Sugar so that every use of the given module name is updated to your preference, seamlessly to all users. You can also use the language dropdown list at the top of the page to rename the modules to a language other than English.

The following steps cover renaming the Contacts module as an example:

1. Navigate to Admin > Rename Modules.
2. Locate the module you wish to change and click the Pencil icon to the left of the module's name.

Rename Modules

Click **Save** to apply the changes.



Save Cancel

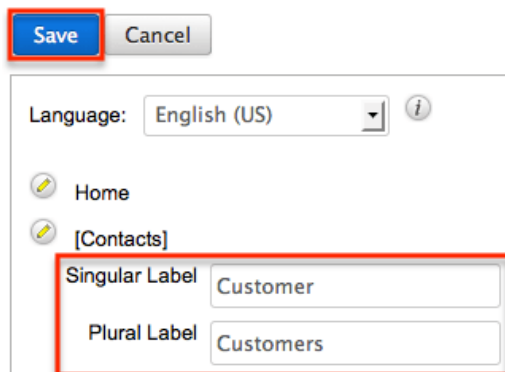
Language: English (US) ⓘ

- Home
- Contacts**
- Accounts
- Opportunities
- Cases

3. Enter in a new singular and plural name for the module then click the Pencil icon again to close the text boxes.

Rename Modules

Click **Save** to apply the changes.



Save Cancel

Language: English (US) ⓘ

- Home
- [Contacts]**

Singular Label Customer

Plural Label Customers

4. Click "Save" to deploy your changes across your instance.

Display Modules and Subpanels

Administrators have the ability to control which modules and subpanels will appear in their instance via Admin > Display Modules and Subpanels. This option is useful as any unnecessary module(s) and subpanel(s) can be hidden to prevent user's from accessing it. Please note that not every module and subpanel in Sugar is enabled by default when initially installed.

Once the Display Modules and Subpanels page is open, you will see the Displayed Modules, Hidden Modules, Displayed Subpanels, and Hidden Subpanels column. To configure which modules are displayed on the navigation bar, drag and drop the module from the Hidden Modules column to the Displayed Modules column. To hide a module, simply drag and drop the module from the Displayed Modules column to the Hidden Modules column. To configure which subpanels appear in

modules, drag and drop the module from the Hidden Subpanels column to the Displayed Subpanels column. To hide a subpanel, simply drag and drop the module from the Displayed Subpanels column to the Hidden Subpanels column. 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.

Please note that if a hidden module is related to a module that is visible in Sugar, it will display as a subpanel in the record view (for Sidecar modules) or detail view (for Legacy modules) of the related module. In addition, hidden modules continue to be available to users when viewing, creating, and managing reports via the Reports module. When a subpanel is hidden, users cannot view any related records from the record view (for Sidecar modules) or detail view (for Legacy modules) of the related module.

Display Modules and Subpanels

Drag and Drop the names of the modules below to set them to be displayed or hidden

Allow users to select modules to appear in the navigation bar i

| Displayed Modules | Hidden Modules |
|-------------------|----------------|
| Accounts | Contracts |
| Contacts | |
| Opportunities | Opportunities |
| Leads | |
| Calendar | |
| Reports | |
| Quotes | |
| Quoted Line Items | |
| Documents | |
| Web Logic Hooks | |
| Emails | |

| Displayed Subpanels | Hidden Subpanels |
|---------------------|-------------------|
| Contacts | Bug Tracker |
| Leads | Quoted Line Items |
| Accounts | Contracts |

Users have the option to hide and display modules per their viewing preference via the [User Profile](#). The list of available modules to display and hide in a user's account is based on the modules in the Displayed Modules column of the Display Modules and Subpanels page. To disable the users ability to modify which modules are hidden or displayed on their navigation bar, uncheck the Allow users to select modules to appear in the navigation bar checkbox above the Displayed and Hidden Modules columns.

If you wish to prevent certain users from accessing specific modules in Sugar, you can keep the module enabled globally but assign a role to the user. For more information on creating and assigning roles, please refer to the [Role Management](#) documentation.

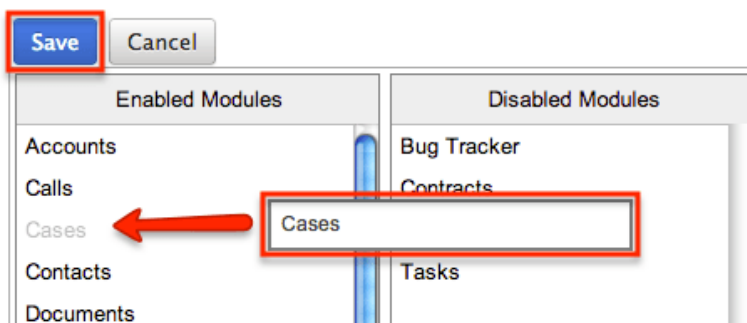
Configure Navigation Bar Quick Create

The Quick Create menu allows users to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of any Sugar page to access the menu. Administrators can easily configure the Quick Create menu via Admin > Configure Navigation Bar Quick Create menu to control which modules are enabled/disabled, as well as the order the modules will appear in the menu.

Once the Configure Navigation Bar Quick Create page is open, you will see the Enabled Modules and Disabled Modules columns. Modules that appear within the Enabled Modules column will display in the Quick Create menu. To enable a module to be displayed in the Quick Create menu, drag and drop the module from the Disabled Modules column to the Enabled Modules column. To disable a module, simply drag and drop the module from the Enabled Modules column to the Disabled Modules column. You can also change the order of the modules as they appear in the Quick Create menu by dragging and dropping the modules up-and-down within the Enabled Modules list. 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 Quick Create 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 i



Workflow Management

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 met. 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. Administrators can create and manage workflows via Admin > Workflow Management. For more information on workflows, please review the [Workflow Management](#) documentation.

Last Modified: 10/22/2015 01:03pm

Studio

Overview

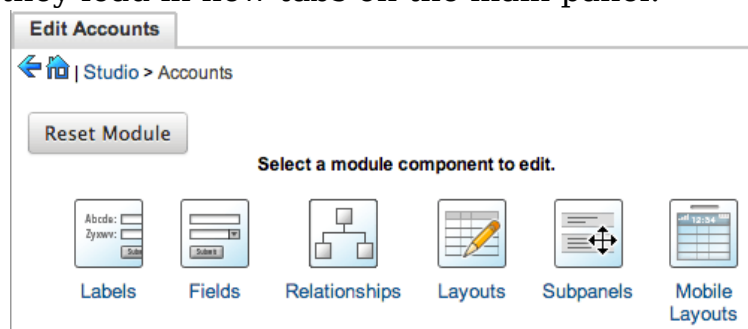
Studio enables administrators to customize stock or custom modules by modifying fields, page layouts, and more so that you can modify Sugar to fit your organization's needs and terminology. Please note that only users with administrator or developer access have the ability to make changes via Admin > Studio. This documentation covers how to use Studio as well as the various actions and options available from within Studio.

Navigation

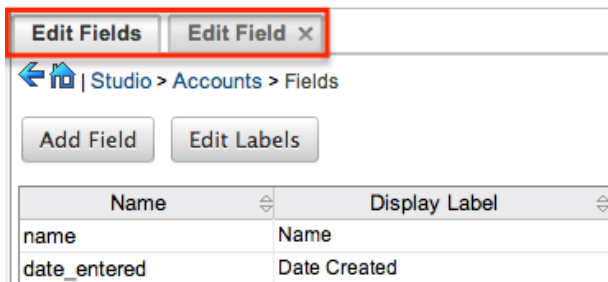
Studio's navigation is different than other modules within Sugar. Studio comprises three main sections: the main panel, modules panel, and footer.

Main Panel

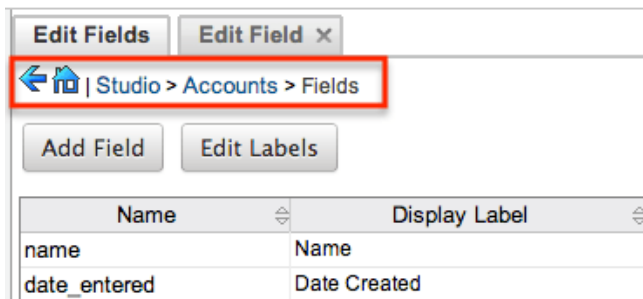
The main panel in Studio is where you can access modules, fields, layouts, etc. It displays to the right of the Modules panel and houses the various components (e.g. fields, layouts, subpanels) of the module. As you select the different components, they load in new tabs on the main panel.



For example, if you select "Fields" on the main panel, the list of available fields along with the options to configure will appear under the Edit Fields tab. Additional tabs that appear as you configure the module can be closed by clicking the "X" within the tab.



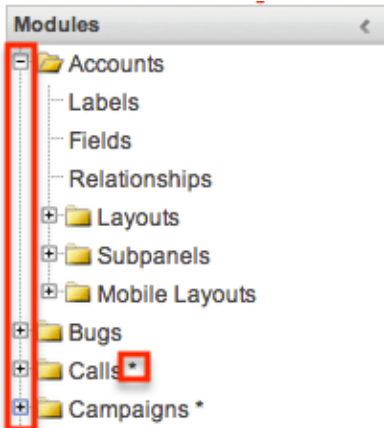
The main panel also includes a breadcrumb bar showing where in Studio you currently are. You can navigate to a specific section by clicking the link within the breadcrumb bar.



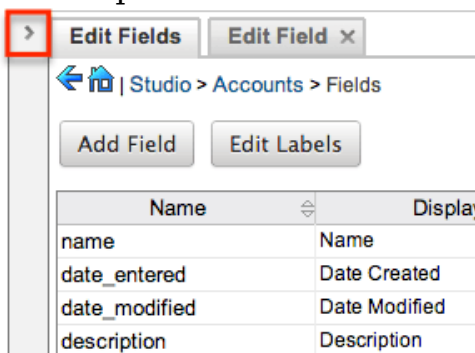
To go back to the previous page you were viewing, click the Left arrow on the breadcrumb bar. Clicking the Home icon to the right of the arrow will navigate you back to the Developer Tools home page.

Modules Panel

The Modules panel is located to the left of the screen and displays a list of existing stock and custom modules that are editable through Studio. Please note that all modules (e.g. Quotes, Campaigns, etc.) using the Legacy user interface will display an asterisk (*) to the right of the modules name in Studio. The associated fields, labels, layouts, subpanels, etc. are grouped within each module. Click the plus sign (+) preceding the module name to expand the module tree and display the associated items (e.g. fields, layouts, etc.). Simply select an item in the Modules panel to load the view in the main panel to the right.

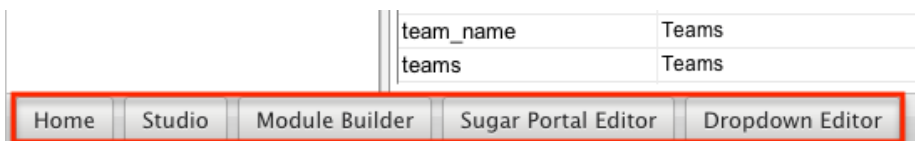


Please note that if you do not see the Modules panel, it may be collapsed. Locate the gray bar to the left of the main panel and click the Right arrow to expand the Modules panel.



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.



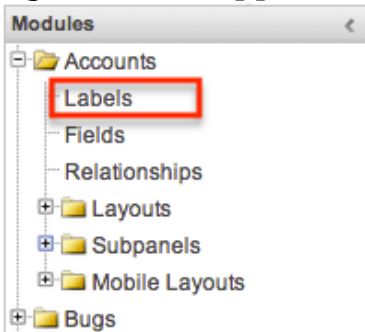
The options in the footer allow you to navigate to the following locations:

| Menu Item | Description |
|-------------------------------------|--|
| Home | Navigates to the home page of Developer Tools |
| Studio | Navigates to the home page of Studio |
| Module Builder | Opens Module Builder to create and manage custom modules |
| Sugar Portal Editor | Opens the Sugar Portal Editor to |

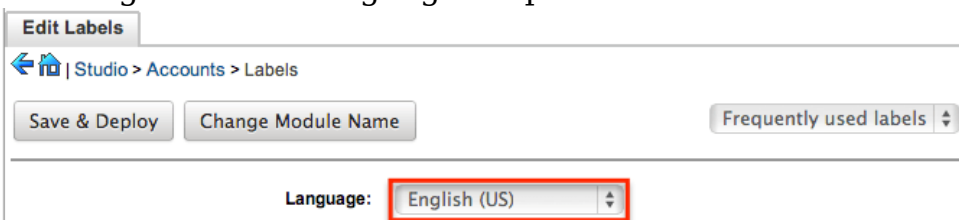
| | |
|---------------------------------|---|
| | configure the Portal |
| Dropdown Editor | Opens the Dropdown Editor to create and edit dropdown lists |

Editing Labels

Labels are used throughout Sugar to designate 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 (e.g. Accounts). Please note that HTML tags are not supported in labels.



The Edit Labels tab will open in the main panel displaying all the labels associated to the module. Please note that you can change the language for the labels by selecting from the Language dropdown list.



If the label you wish to change cannot be found, change the filter dropdown option from "Frequently used labels" to "All Labels".

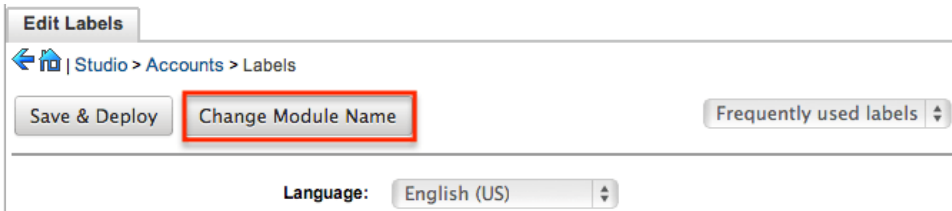


Modify the labels accordingly per the selected language and click "Save and Deploy" when complete. This will save your changes and instantly deploy them to your Sugar instance.



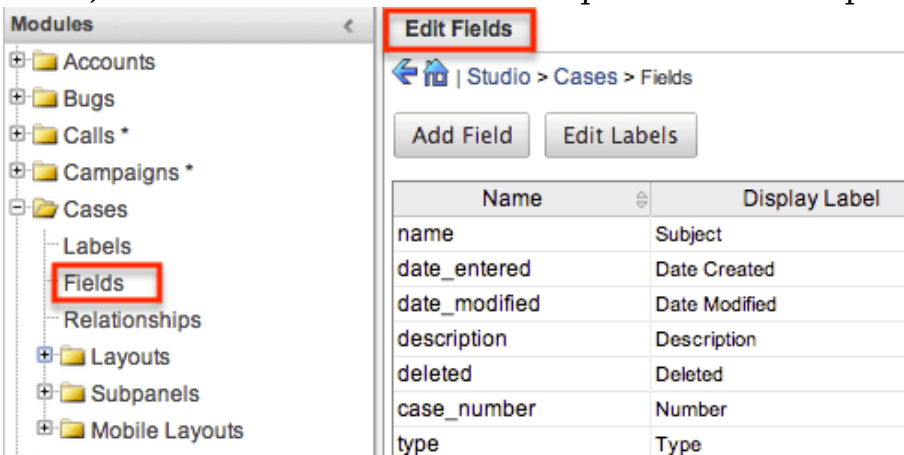
To change the name of the module, click "Change Module Name" to the right of the Save & Deploy button.

- This will direct you to the Rename Modules page where you can change the labels for the module accordingly. For more information on how to rename modules, please refer to the [Rename Modules](#) section of the Developer Tools documentation.



Fields

The Fields section in Studio allows administrators to create new fields for stock and custom modules as well as update existing fields. To access the Fields section in Studio, select "Fields" from the Modules panel under the desired module (e.g. Cases) and the Edit Fields tab will open in the main panel.



Field Types

Studio comes out-of-the-box with many different types of fields which can be created in Sugar. Please note that the options and properties available when configuring the field varies for each data type.

The following data types are available when creating fields 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 stock address fields (e.g. billing address). |
| 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 Calendar icon button to choose a date via the popup calendar, as well as a dropdown list to select 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 where you can associate 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. |
| Flex Relate | Creates a dropdown list from which you can relate a single record from a variety of modules. Note: Only one Flex Relate field is allowed per module. If the module already has an existing Flex Relate field, this option will not display in the Data Type dropdown list. |
| 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 at once. |
| 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 an open text area 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 display as a link. |

Note: Name-type and ID-type fields cannot be created via Studio. Each stock module and module created via Module Builder will have a Name-type and ID-type field. The Name-type field is automatically displayed in the header of each record view (for Sidecar modules) while the ID field is not available in Studio but is a part of the unique URL for each record.


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 create custom fields to store additional data.

Each field, depending on the data type, will have different properties and options available when configuring the field via Studio. Please note that some properties can exist across all data types and some are unique to only a few types.

The following properties and options are available for fields in Studio:

- **Audit** : Select this checkbox to audit the field for changes made in Sugar.
 - Users can view the changes made to audited fields via the View Change Log option in the module's record view (for Sidecar modules) or detail view (for Legacy modules).
 - Fields marked as "Audit" will generate update posts in the activity stream for Sidecar modules (e.g. Accounts, Contacts, etc.) whenever the field gets updated. For more information on activity streams, please refer to the [Activity Streams](#) documentation.
 - Note: The Audit option is available for all data type fields.
- **Border** : Select this checkbox to add a border around the image for this field.
 - Note: 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.
- Note: 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.

- Note: The Columns option is only available for TextArea data type fields.

Comment Text : Enter a comment or description about the field. The comment text is only viewable via Studio.

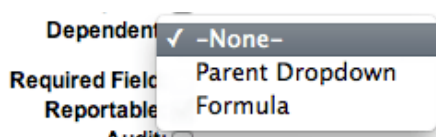
- Note: The Comment Text option is available for all data type fields except Flex Relate.

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 record view (for Sidecar modules) and edit view (for Legacy modules) layout, but can be modified by users.

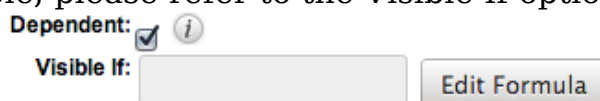
- Note: The Default Value option is available for all data type fields except HTML, Image, Flex Relate, and Relate.

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 as shown below. Selecting "Formula" will open the Visible If option to create a dependency formula. For other field data types (e.g. Date), 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.



- Note: 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.


- Note: 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. Normally defaults to the Field name entered when creating the field.

- This value is also modifiable via the [Labels](#) section of Studio.
- Note: 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 associate to the field.

Drop Down List: 

- Only values in the chosen list will be available for selection in the field. Click "Edit" to change the values for the currently selected list, or click "Add" to create a new list.
- Note: The Drop Down List option is only available for the DropDown, MultiSelect, and Radio data type fields. For more information on editing dropdown values via the Dropdown Editor, please refer to the [Editing Dropdown Lists](#) section of the Developer Tools documentation.

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 on the Merge Duplicates screen.
- Enabled : The field will appear on the Merge Duplicates screen.
- In Filter : (Legacy/BWC modules only) The field will appear in the Merge Duplicates feature, and will also be available in the Find Duplicates feature.
- Default Selected Filter : (Legacy/BWC modules only) 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: (Legacy/BWC modules only) The field will not appear in the Merge Duplicates feature, but will be available in the Find Duplicates feature.
- Note: The Duplicate Merge option is available for all data type fields except Image.

Field Name : Enter 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 via Studio are automatically appended with a "_c" to ensure the field does not conflict with a current or future stock field.
- Note: The Field Name option is required for all data type fields.

Full-Text Searchable : Select a boost level for indexing this field in Full-Text Search.

- "Disabled" prevents the Full Text engine from indexing the field.
- Search gives fields with a higher boost level greater weight when a search is performed, making the matching values appear higher in the


search results list. If you change the boost level for a field from one level to another, be sure to perform a system index to apply the change.

- Note: The Full Text Searchable option is only available 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 and change the formula. For more information on how to build a formula using the formula builder, please refer to the [Using Sugar Logic](#) section of this documentation.

Calculated Value: 

Formula:

- Note: The Formula option is only available when the Calculated Value option is selected when editing or creating a field.

Generate URL : Select this checkbox to allow variables from the current module to be placed into the Default Value option for creating dynamic URLs.

Generate URL:

Default Value:

- This is useful for providing links or iFrames to internal systems such as an ERP or to external systems such as Google Maps.
- 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.
- Note: The Generate URL option is only available for the IFrame and URL data type fields.

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.

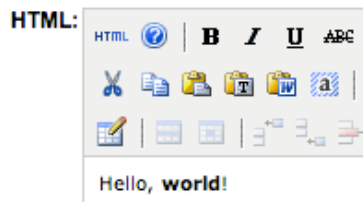
- Note: The Height option is only available for Image data type fields.

Help Text : Enter in basic instructions for populating this field. The text entered here will display below the field when creating or editing a record for modules using the Sidecar user interface. For modules using the Legacy user

interface, the helptext will appear when users hover their mouse within the field in the Edit View layout.

- Note: 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



- Note: 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.

- Note: 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".

- Note: 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.

- Note: 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 (or, for DB2 databases, the maximum number of bytes) allowed for this field. Defaults to 255.

- Note: 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 enters a higher value in the field than the specified value, a notification will appear upon save informing them of the set maximum value.

- Note: 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 enters a value in the field that is lower than the specified value, a notification will appear upon save informing them of the set minimum value.

- Note: The Min Value option is only available for Integer data type fields.

Module : Select a module from the dropdown to relate to the current module.

- 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 chosen module cannot be modified once the field is created.

Module:

- Note: 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.
- Note: 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.

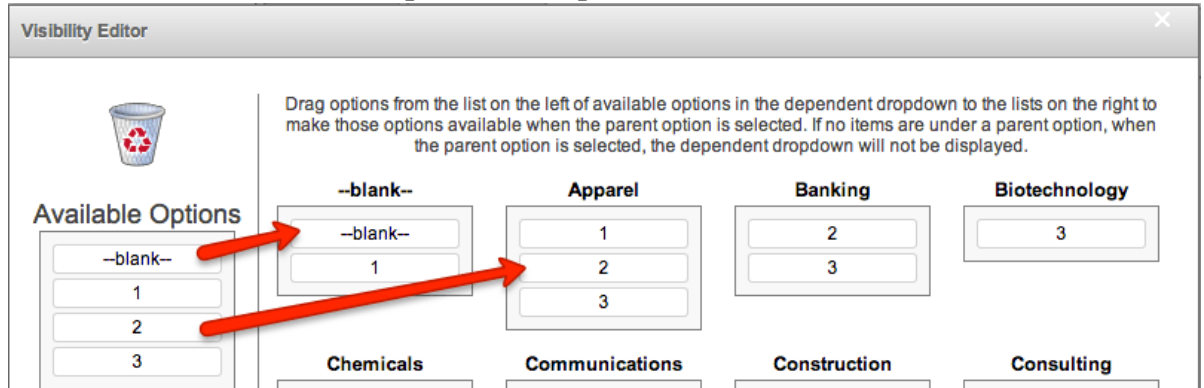
- The Parent Dropdown option is populated with the other dropdown data type fields in the current module.

Dependent:

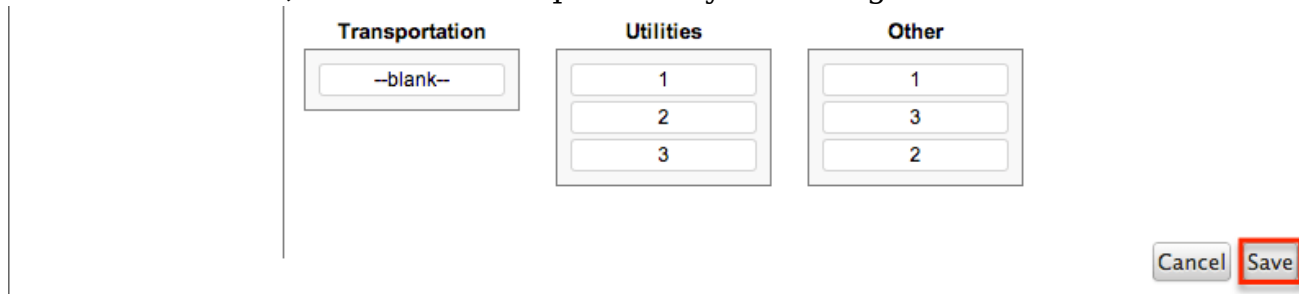
Parent Dropdown:

- Note: The Parent Dropdown option is only available when the Dependent option has "Parent Dropdown" selected.

- 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 dependent dropdown will not display. To remove an item from the list, simply click and drag the value to the Trash bin on the left. Once the values are set, click "Save" to preserve your changes.



Precision : Enter a number to specify the number of digits to the right of the decimal point the value should be stored as in Sugar.

- Note: The Precision option is only available for the Decimal and Float data type fields.

Reportable : Select this checkbox to allow the field to be used in reports.

- Note: The Reportable option is available for all data type fields except Encrypt, Flex Relate, HTML, IFrame, and Image.

Required Field : Select this checkbox to mark the field as required in Sugar. The user will be required to enter a value for the field when saving the record.

- Note: The Required 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.

- Note: 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 an uppercase upon saving. Once the field has been created, the system label cannot be changed.

- It is recommended that administrators avoid naming fields with the same system label in order to prevent the same label and header values from existing in the system.
- Note: 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 of this documentation.
- Note: The Visible If option is only available when the Dependent option is checked or "Formula" is selected from the dropdown.

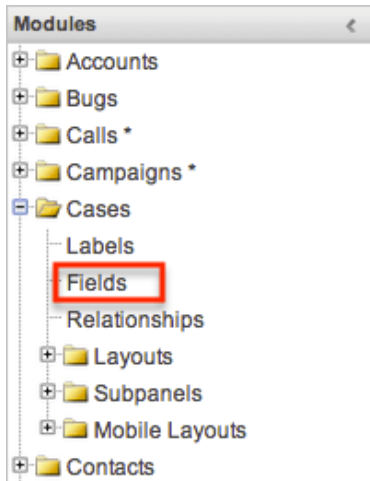
Width : Enter the number of pixels to horizontally scale the image for this field. Enter only the Width or Height options to retain the aspect ratio of the image.

- Note: The Width option is only available for Image data type fields.

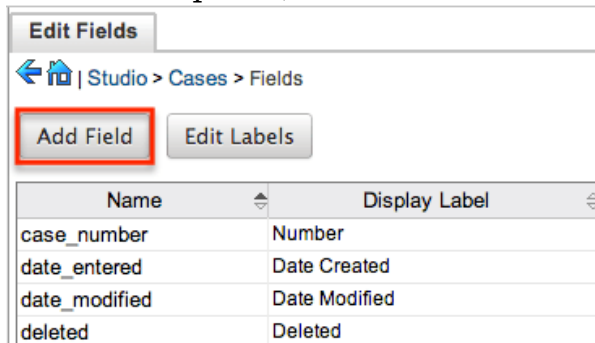
Creating Fields

Use the following steps to create a new field via Studio:

1. Expand out the tree under the desired module (e.g. Cases) in the Modules panel and select "Fields".



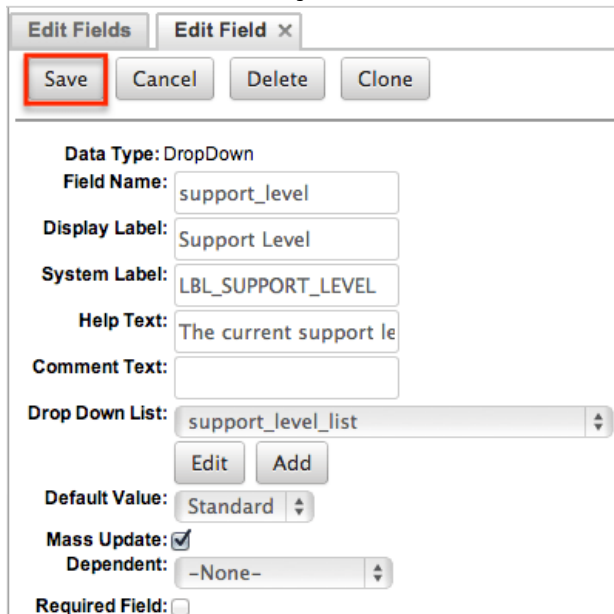
2. In the main panel, click "Add Field".



3. Enter appropriate values for the [Field Options](#).

Note: Field Name is required.

4. Once the necessary information is entered, click "Save".

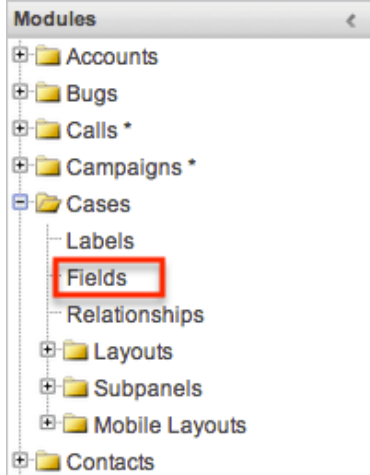


Please note that once a field is created, it must be placed on the record view (for Sidecar modules) or edit view (for Legacy modules) layout before users can enter data into that field. For more information on editing layouts, please refer to the [Editing Layouts](#) section of this documentation.

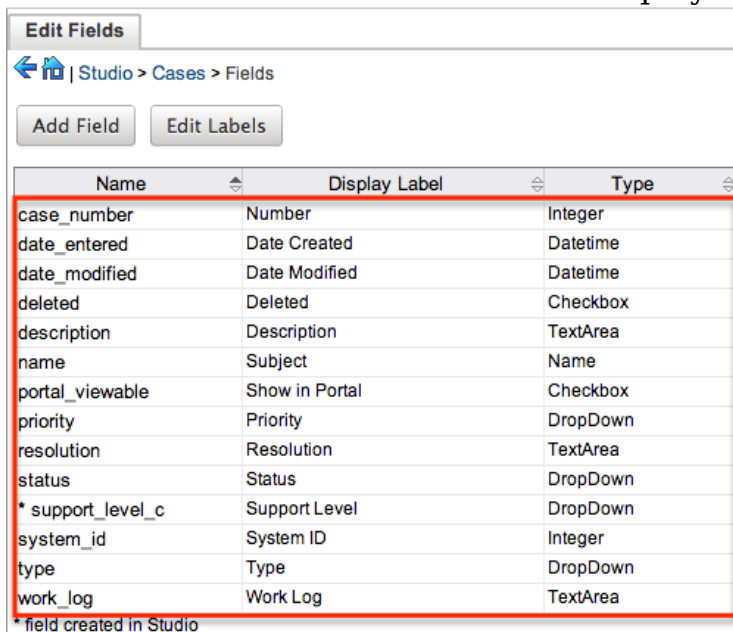
Editing Fields

Use the following steps to edit an existing field via Studio:

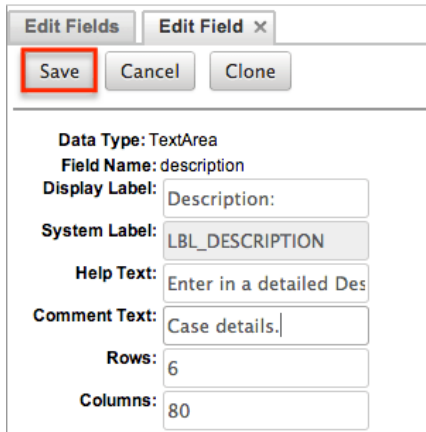
1. Expand out the tree under the desired module (e.g. Cases) in the Modules panel and select "Fields".



2. In the main panel, select a field to edit. Sorting the fields by the column header helps locate the field faster.
 - Note: Fields created via Studio display an asterisk next to their names.



3. Enter appropriate values for the [Field Options](#).
4. After entering the necessary information, click "Save".



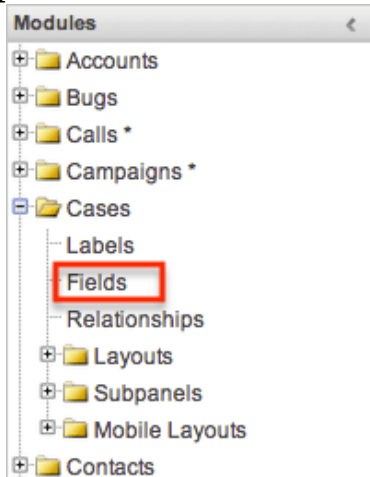
Edit Fields Edit Field ×
 Save Cancel Clone

Data Type: TextArea
 Field Name: description
 Display Label: Description:
 System Label: LBL_DESCRIPTION
 Help Text: Enter in a detailed Des
 Comment Text: Case details.
 Rows: 6
 Columns: 80

Deleting Fields

Use the following steps to delete an existing field via Studio:

1. Expand out the tree under the desired module (e.g. Cases) in the Modules panel and select "Fields".



2. In the main panel, select a field to delete. Sorting the fields by the column header will help in locating the field faster.
 - Fields created via Studio will display an asterisk (*) next to their names.
 - Note: Stock fields cannot be deleted.

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

3. Click "Delete" to remove the field.

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

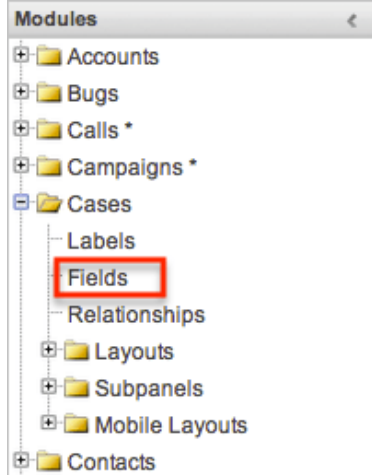
Edit Add

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

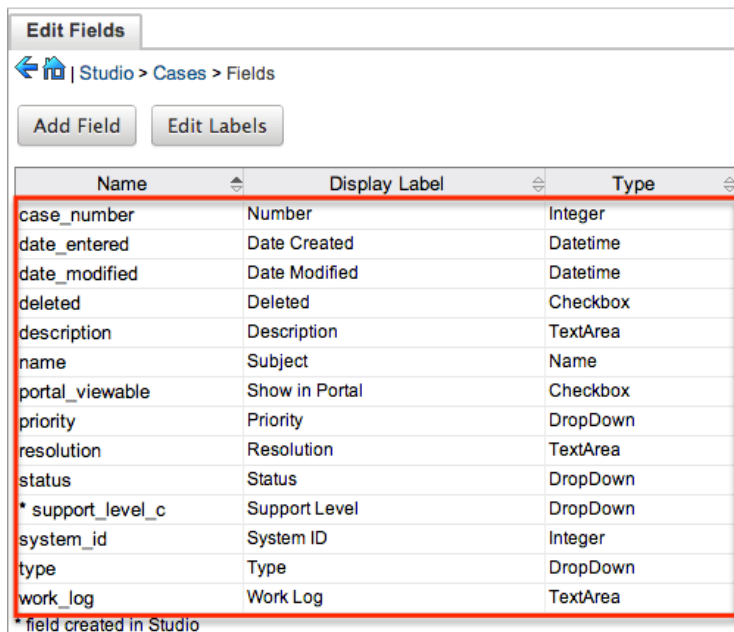
Cloning Fields

Use the following steps to clone an existing field via Studio:

1. Expand out the tree under the desired module (e.g. Cases) in the Modules panel and select "Fields".



2. In the main panel, select a field to delete. Sorting the fields by the column header will help in locating the field faster.
 - Note: Fields created via Studio will display an asterisk (*) next to their names.



3. Select "Clone" to duplicate the field.
 - Note: Some non-standard stock fields (e.g. Name) do not have the ability to 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

4. Enter appropriate values for the [Field Options](#).
5. Once the necessary information is entered, click "Save".

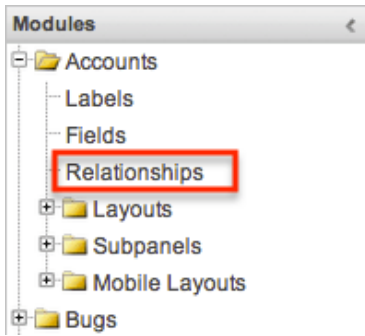
Edit Fields Edit Field x
Save Cancel

Data Type: DropDown
 Field Name: secondary_support
 Display Label: Secondary Support
 System Label: LBL_SECONDARY_SUPP
 Help Text: The current support le
 Comment Text:
 Drop Down List: support_level_list
 Edit Add
 Default Value: Standard
 Mass Update:
 Dependent: -None-
 Required Field:

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 record view (for Sidecar modules) or detail view (for Legacy modules) 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 Relationships section in Studio, select "Relationships" from the Modules panel and the module's relationship tab will open in the main panel.



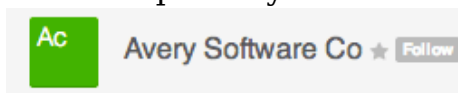
Relationship Types

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 when managing 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 record view where changing the relationship from either module will also change the value in the other module.

From the primary Accounts module:



Website

<http://www.avery.com>

Member of


Assigned to

[Max Jensen](#)

Contacts

[Donny Milliron](#)

From the related Contacts module:


Donny Milliron
★ Follow

Title
VP Sales


Department

Account Name
Avery Software Co


Note: You can create a one way relationship between modules using relate fields. For more information regarding relate fields, please refer to the [Field Types](#) section of this documentation.

- 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 record view of the primary module will display a subpanel for the related module, and the record view of the related module will display a field containing a link to the related record.

From the primary Accounts module:

|  Contacts | | |
|---|--------------------------------|-----------------------------------|
| | Name | Account Name |
| ★ | Herb Glancy | NW Bridge Con... |
| ★ | Donny Milliron | Avery Software... |

From the related Contacts module:


Donny Milliron
★ Follow

Title
VP Sales

Department

Account Name
Avery Software Co

Note: A one-to-many relationship is the same as a many-to-one relationship except the Primary and Related modules are reversed. Adding a custom one-to-many relationship to "Activities" will add custom relationships to calls, meetings, notes, tasks, and emails. This will also automatically add these subpanels to the record view.

- 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 record view will display a subpanel for the opposite module.
From the primary Accounts module:

Co Contacts

| | Name | Account Name |
|---|--------------------------------|-----------------------------------|
| ★ | Herb Glancy | NW Bridge Con... |
| ★ | Donny Milliron | Avery Software... |

From the related Contacts module

Ac Accounts

| | Name | Phone |
|---|--|----------------|
| ★ | Avery Software Co | (320) 013-8679 |
| ★ | NW Bridge Construction | (265) 634-6785 |

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.

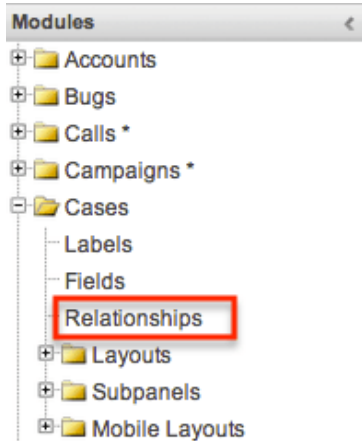
When you create a relationship for a module, the module you initiate the relationship from is considered the primary module and the module that you relate it with is the related module.

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.

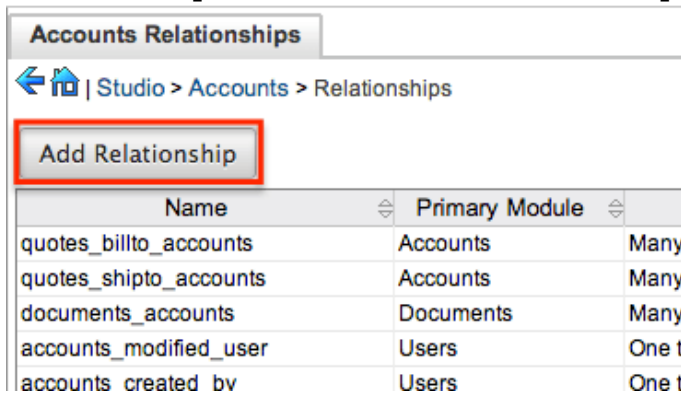
Creating Relationships

Use the following steps to create a new relationship via Studio:

1. Expand out the tree under the desired module (e.g. Cases) 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 as the module to which you are adding the relationship. Select the related module from the dropdown list to the right. 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.

- Note: 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.

- Note: 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) ▾

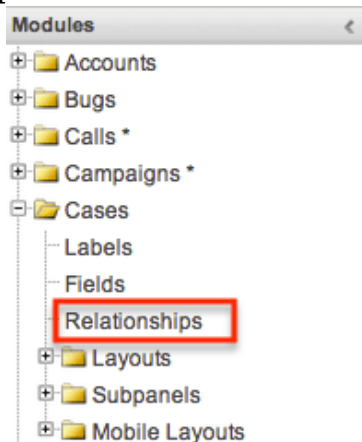
| Primary Module | Type | Related Module |
|---|----------------|--|
| Module: Cases | Many to Many ▾ | Module: Products ▾ |
| Label: Product Cases | | Label: Products Affected |
| Subpanel from Cases: default ▾ | | Subpanel from Products: ForProducts ▾ |

- 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 (e.g. Cases) in the Modules panel and select "Relationships".



- In the main panel, select a relationship to edit.
 - Sorting the column header helps locate the relationship faster.
 - Note: Relationships created via Studio display an asterisk next to their names.

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

- The only editable field on a relationship is the Label field for naming the Primary or Related modules subpanels.
 - Note: This option is only available for the "Many" side of a relationship.
- After entering the necessary information, click "Save".

Cases Relationships Edit Relationship ×

Save Cancel Delete

Language: English (US)

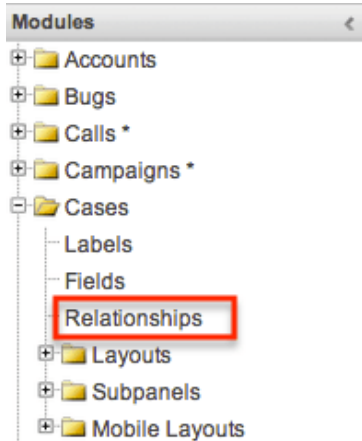
Name: cases_products_1

| 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 (e.g. Cases) in the Modules panel and select "Relationships".



2. In the main panel, select a relationship to delete.
 - Sorting the column header helps locate the relationship faster.
 - Note: Relationships created via Studio display an asterisk next to their names.

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

3. Select "Delete" to remove the relationship.

Cases Relationships Edit Relationship ×

Save Cancel Delete

Language: English (US)

Name: cases_products_1

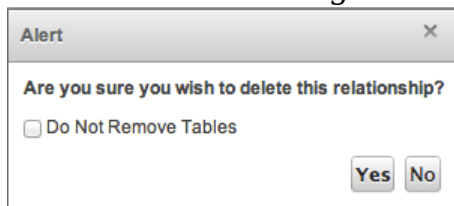
| Primary Module | | Type | Related Module | |
|----------------------|----------------|--------------|-------------------------|-------------------|
| Module: | Cases | Many to Many | Module: | Products |
| Label: | Product Issues | | Label: | Products Affected |
| Subpanel from Cases: | default | | Subpanel from Products: | ForProducts |

4. Click "Yes" on the confirmation pop-up to proceed.

- Note: If you wish to retain the data and table structure that currently

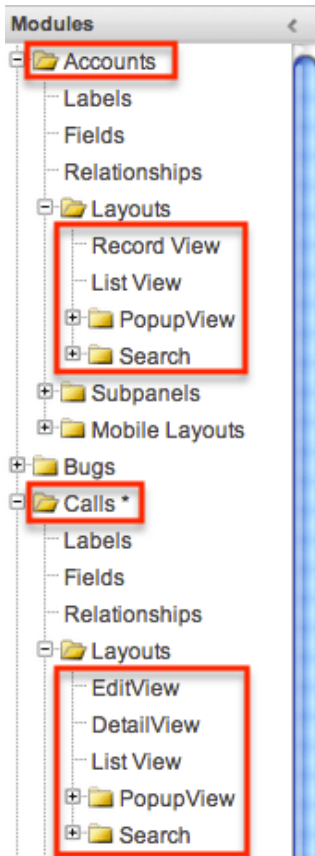
exists for the relationship, select the "Do Not Remove Tables" option. Leaving the "Do Not Remove Tables" unchecked will delete the relationship data and remove the tables for the relationship from the database.

- Before deleting a relationship, please verify and resolve the following issues:
 - The relationship must be removed from any report filters or displays.
 - The relationship must be removed from any workflows that filters or displays fields from the relationship.
 - The relationship must be removed from any Sugar Logic formulas referencing the relationship.



Layouts

The layouts in Studio are used to represent the various views (e.g. record view, list view, edit view) in Sugar. Users with administrator or developer access have the ability configure these layouts via Admin > Studio. Please note that the layouts available to configure vary based on whether the module uses the Sidecar or Legacy user interface. All modules using the Legacy user interface display an asterisk (*) to the right of the module's name in Studio. The available layouts for the selected module appear once you open the Layouts option.



Layout Types

Sugar comes with different types of layouts to represent different sections of Sugar. Please note that not all layouts are available in every module.

Note: Some views may be configured to display differently [based on the viewing user's role](#).

The following layout options are available in Sugar:

- Convert Lead : The Convert Lead layout can be configured to mark modules as required for lead conversion, add or remove modules from the convert lead layout, etc. Please note that the Convert Lead layout is only available for the Leads module. For more information on modifying the Convert Lead layout, please refer to the [Editing Convert Lead Layout](#) section below.
- Record View(for Sidecar modules) : Record view is used to modify, create, or view the current record's details within a specified module. This layout is specific to modules using the Sidecar user interface and controls the layout for viewing, creating, and editing a record, as well as the quick-create layout and the fields displayed when the record is viewed via the preview pane.
- Edit View (for Legacy modules) : Edit view layout is used to modify or create

records in the specified module.

- Detail View(for Legacy modules) : Detail view layout is used to view the current data for a record within the specified module.
- List View : List view layout is used to view multiple records within the specified module. The list view is also used for displaying the results from module search (for Sidecar modules), as well as Basic or Advanced search (for Legacy modules).
- Quick Create (for Legacy modules) : Quick Create layout is used in Sugar to quickly view and modify records within a specified module without having to navigate away from the current page. For example, logging a call from the Quotes detail view will open up the call's quick create form.
- Popup List View : Pop-up list view layout is used to view a list of records in a pop-up window when selecting one or more records to relate to a current record.

Account List

| Acct. Name | City | State | Country | User |
|--------------|-----------|------------|---------------|---------------|
| SugarCRM Inc | Cupertino | California | United States | Administrator |

- Popup Search(for Legacy modules) : Pop-up search layout allows users to search for records in the pop-up window to relate to a current record and appears above the pop-up list view in the same window. Legacy modules (e.g. Quotes) use this layout for pop-up searching while Sidecar modules (e.g. Accounts) use the Search layout's configuration.

Account Search

| | | | |
|---------------|------------------------------------|-----------------|------------------------------|
| Name | <input type="text" value="Sugar"/> | Billing City | <input type="text"/> |
| Billing State | <input type="text"/> | Billing Country | <input type="text"/> |
| Any Email | <input type="text"/> | Assigned to | Administrator Will Westin |

- Search : Search layout is used to allow users to search for records from a module's list view via module search (for Sidecar modules) or Basic and Advanced search (for Legacy modules). This layout is also used by Sidecar modules on the pop-up search and select. In addition, changes made to the Search layout for Sidecar modules affects the list of available fields to filter for the module's list view dashlet (e.g. My Contacts) since it is controlled by the same layout as well.

Note: Encrypt fields cannot be added to Search layouts.

Layout Options

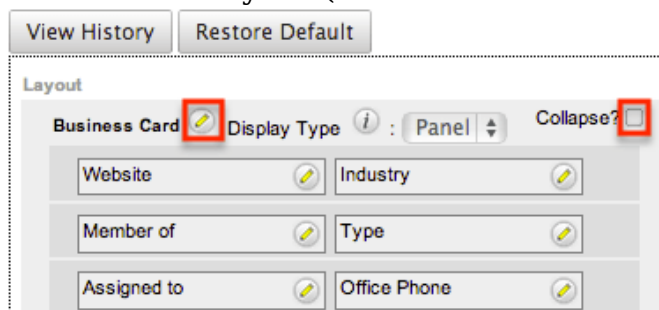
Administrators have the ability to configure the various layouts (e.g. record view, list view, etc.) available via Studio.

The following are some of the options available to administrators when configuring layouts in Studio:

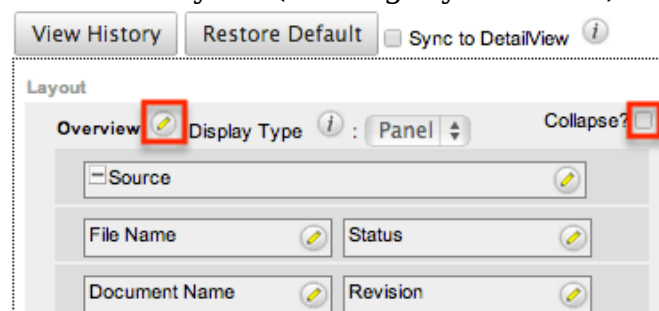
- **Panels** : Every field on a layout is contained within a panel, which can be organized to contain groups of similar or related fields to assist in organization. Modules using the Legacy user interface will have fields grouped by default into the Overview and Other panels while modules using the Sidecar user interface will have the Business Card and Show More panels. You can change the panel header titles by clicking the Pencil icon to the right of the panel name.

Note: You can have the panel collapsed by default on the Record View, Edit View, or Detail View by marking the Collapse? checkbox to the far right of the panel header.

Record View layout (for Sidecar modules):

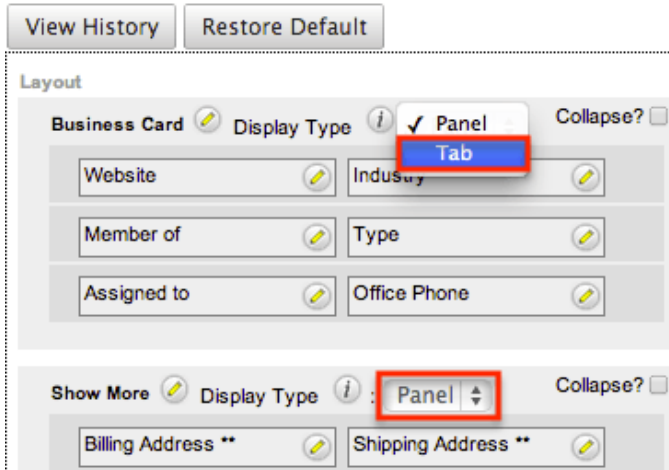


Edit View layout (for Legacy modules):



- **Tabs** : Each of the panels (Business Card, Overview, etc.) have the option of being displayed as tabs in the layout. You can also have panels nested within other panels defined as tabs.

Note: For example, if you set the Business Card panel as a "Tab" and leave "Show More" as a panel in the Record View layout, the Show More panel will appear within the Business Card tab.



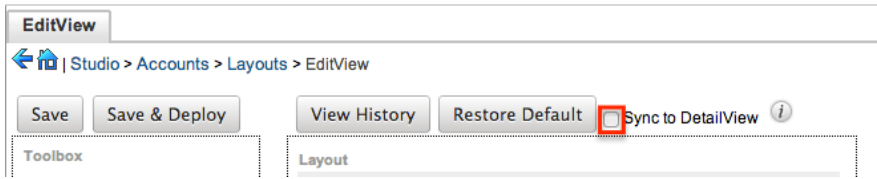
Every panel listed under a Tab display type will be a panel within the tab until the next Tab display type panel is reached. So if you add a new panel below "Show More" and set both the Business Card and Show More panel as "Tabs", then the newly added panel will appear within the Show More tab.

- View History : Sugar keeps a history of the changes made to each layout. You can preview and restore historical layouts via "View History". For more information on viewing the history of layouts, please refer to the [Viewing Layout History](#) section of this documentation.
- Restore Default : Restores the Record View, Detail View, etc. layouts back to the default out-of-the-box layout. For more information on how to reset a layout to default, please refer to the [Restoring Layout Defaults](#) section in this documentation.
- Role : Record views may be configured to display differently based on the viewing user's role. For more information, please refer to the [Creating Role-Based Record View Layouts](#) section.
- Sync and Copy Layouts (for Legacy modules) : 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 layout can be copied from the edit view layout. For more information on Syncing and Copying layouts, please refer to the [Sync And Copy](#) section.

Sync And Copy (Legacy Modules)

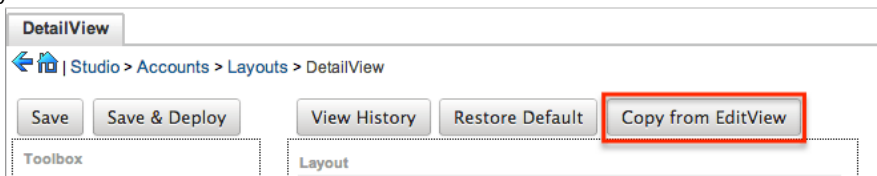
Sugar provides administrators with the ability to sync and copy certain layouts to assist in configuring layouts. Often it makes sense for a module's edit view and detail view layouts to be identical. Instead of having to duplicate any changes made to one layout, administrators can configure the detail view layout to be synced to the edit view layout.

To sync the layouts, select the Sync to DetailView checkbox on the upper right of the EditView 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 DetailView layout in Studio, but any changes made to the EditView layout will automatically be synced to the DetailView layout when saved.

As an alternative to syncing the layouts, administrators can copy the layout from the EditView to the DetailView or QuickCreate layouts. This is especially useful if you want the layouts to be similar, but different. Make any necessary changes to the EditView layout, then navigate to either the DetailView or QuickCreate layout. Select "Copy from EditView" to replace the current layout with details from the EditView layout. Once copied, you can continue to edit the DetailView layout as you wish.



Note: The copy feature is a one time copy of the layouts. Any future changes to the EditView layout will not be reflected on the DetailView layout without performing the copy again.

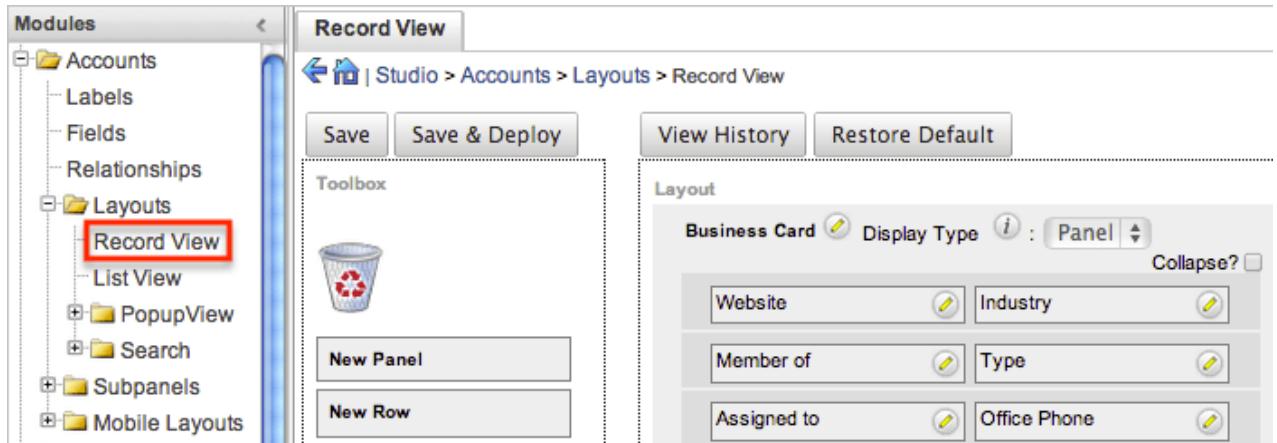
Editing Layouts

You can add, remove, hide, etc. the fields for the available layouts in the module by selecting the specific layout under the Modules panel to edit. Please note that the List View, PopupView, and Search layouts have columns where you can designate fields users can and cannot see. Record views may be configured to display differently [based on the viewing user's role](#).

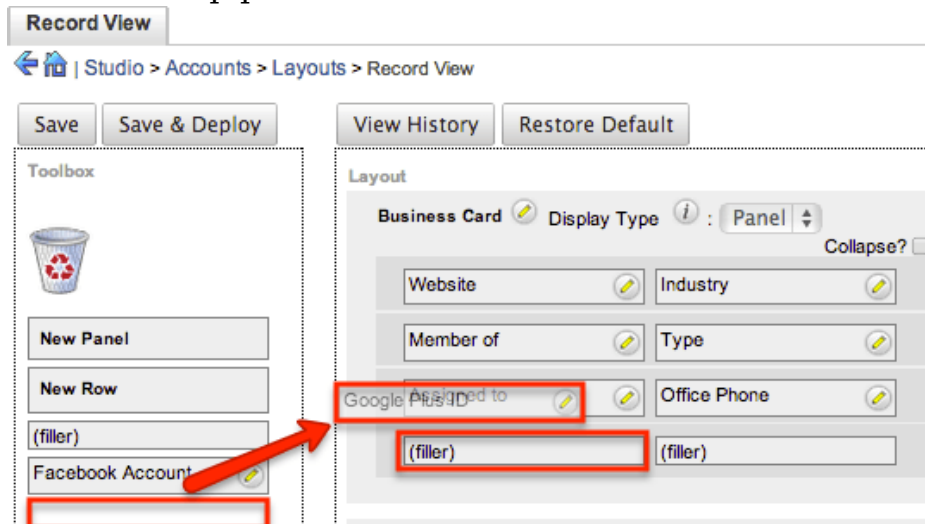
Editing Record View Layout

The following steps cover editing the Record View layout for the Accounts module as an example:

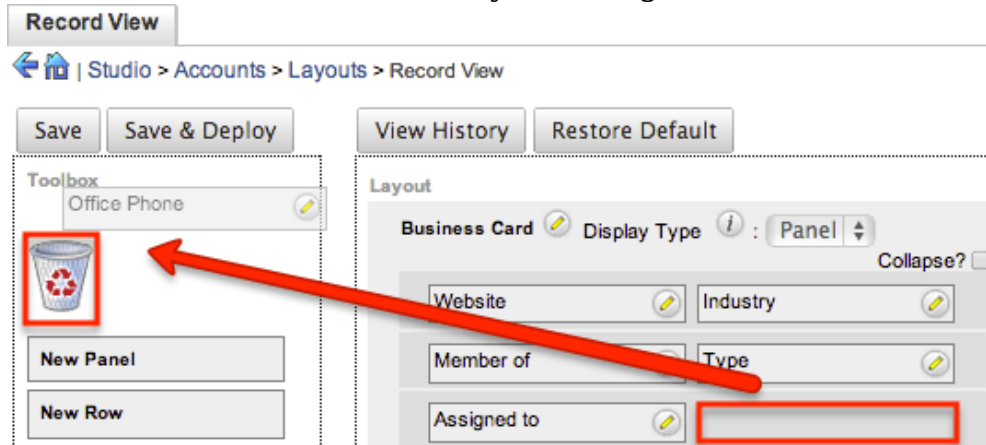
1. Expand "Layouts" from the Modules panel under the Accounts module and select "Record View". The Record View layout will display in the main panel to the right.



2. To add a field to the Record View layout, drag the field from the list of fields in the Toolbox to a "(filler)" location on the layout per your preference.
 - You can also drag a field to a location on the layout that already has a field in place. The newly added field and the existing field on the layout will swap places.



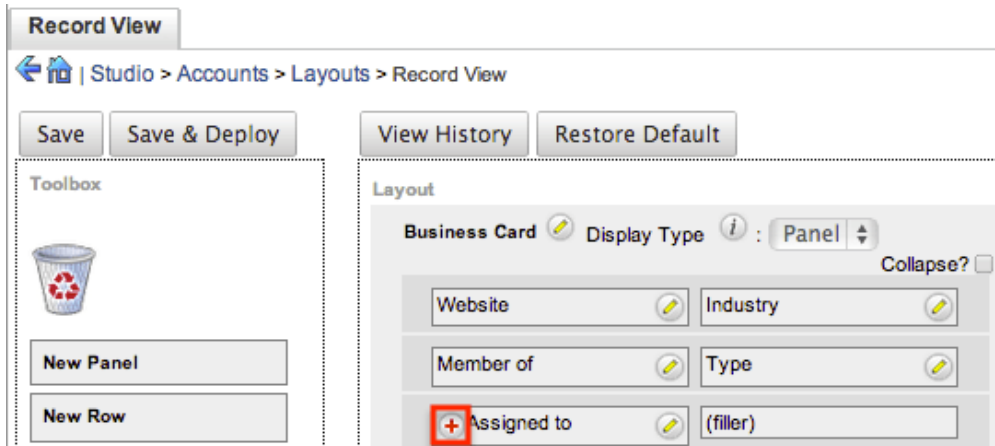
3. To remove a field from the layout, drag and drop the field from the layout to the trash bin in the toolbox to remove the field from the layout. You may remove an entire row in the layout using the same method.



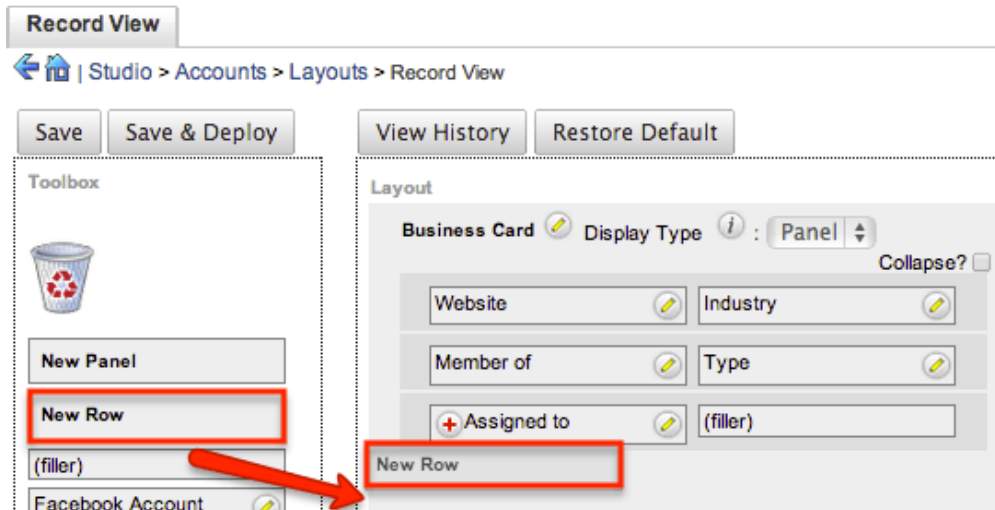
4. To expand or minimize the field column in the layout, click the Plus icon (+) to stretch the field over two columns or click the Minus icon (-) to fit the field

into one column.

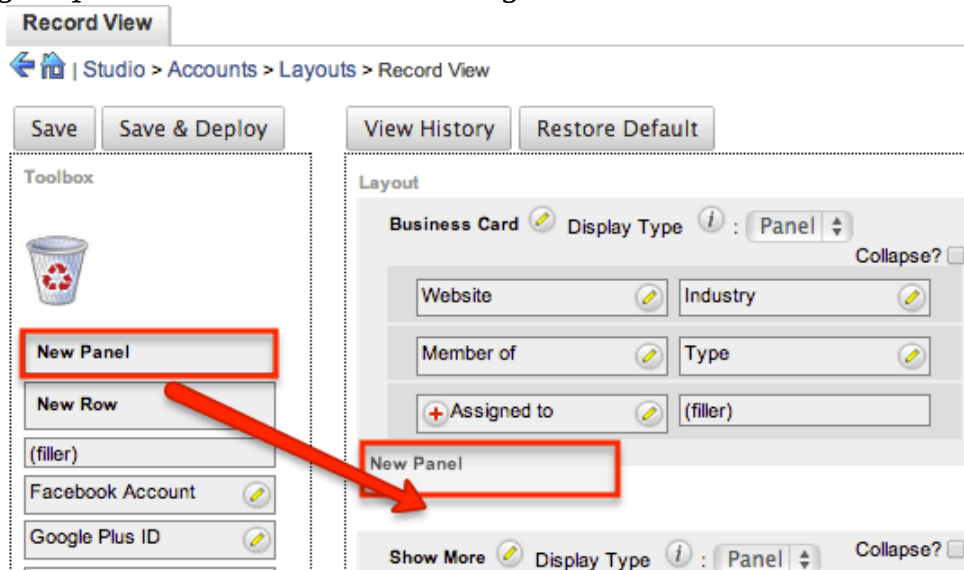
- Note: The layout will display a "(filler)" if there is no field in that location.



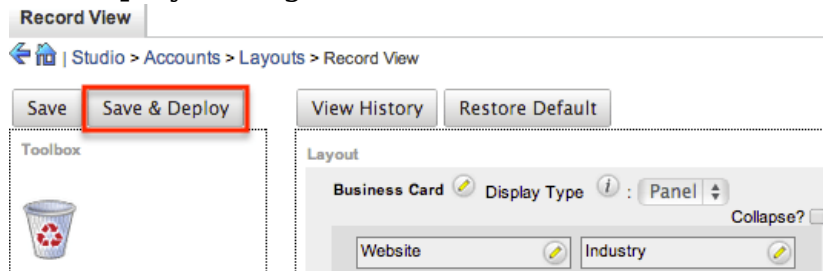
5. To add a new row, drag the "New Row" item in the Toolbox to the layout to allow additional fields or blank spaces to be added.



6. To add a new panel, drag the "New Panel" item in the Toolbox to the layout to group different sets of fields together in the Record View layout.



-
7. Once the layout is finalized, click "Save & Deploy" to preserve your changes and deploy immediately.
- You can click "Save" if you wish to preserve the changes made but not deploy to Sugar's user interface.



Note: It is recommended that dependent fields be placed below and/or to the right of the independent field in order to preserve the correct display of fields on the layout.

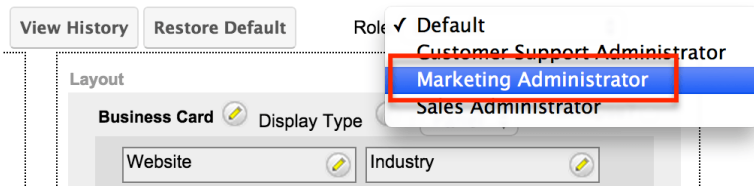
Creating Role-Based Record View Layouts

Record Views can be configured to display customized layouts based on the viewing user's role. The availability and organization of fields may be altered to provide only the relevant fields for each user's role according to your business practices. When editing a particular module's record view, the Role dropdown appearing on the top right contains all existing roles in the Sugar application. By default, none of the Sugar roles have customized views, so changes made to the Default role-view will automatically be copied to the other role-views upon save. This means that as long as no role-views are customized here, all users will continue to see the record view layout matching the Default role-view.

Note: It is recommended to assign each user to a maximum of one role. Users belonging to multiple roles which each have customized role-views may experience unexpected behavior when using record views. For more information about roles, please refer to the [Role Management](#) documentation.

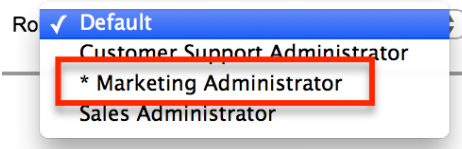
Note: Role-based customizations to record views are included when exporting customizations from Studio. For more information, please refer to the [Exporting Customizations](#) section and the [Module Loader](#) documentation.

If you wish to cause certain roles to use a modified record view for a module (e.g. Accounts), navigate to Admin > Studio > Accounts > Layouts > Record View and select the desired role from the Role dropdown to make changes specific to that role (e.g. Marketing Administrator).



When viewing a Sugar role's role-view (e.g. Marketing Administrator), you have the option add, remove, and rearrange fields and panels. You may manipulate the layout as described in the [Editing Record View Layout](#) section above. The inclusion and location of fields will be specific to the role-view you are customizing. However, changes made to a field's display label from any of the role-views will update that field's display label on all role-views.

Once you have saved a modification to a role-view, it is considered customized and will display an asterisk (*) next to the role's name in the Role dropdown. Adding, removing, and rearranging fields or panels on the Default role-view will no longer have any affect on customized role-lists.



Note: Role-based views are not available for Legacy modules' detail views or any other sidecar layouts besides the record view. The Sidecar module must be available for editing in Studio for you to be able to create role-based record views for it.

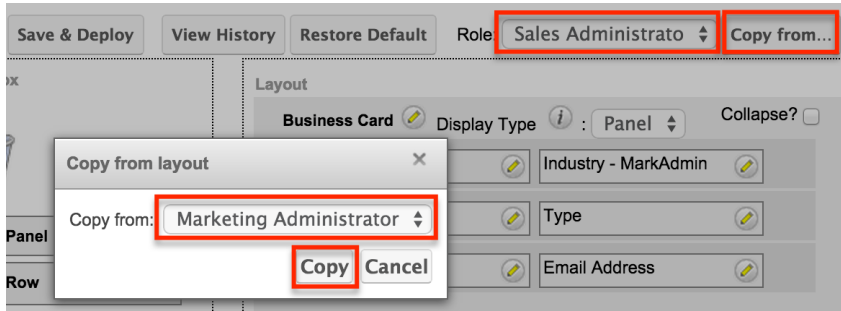
Copying a Role-View From a Customized Role-View Layout

Customized role-view layouts may be copied to any other role-view except for the Default role-view.

- Select the role-view you wish to alter in the Role dropdown
- Click "Copy from..." and select the customized role-view you wish to duplicate.

Note: The Copy from... button will only appear when a customized role-view is available to be copied.

- Click "Copy", and save.



This will update the role-view to match the copied layout, and the role-view will now be considered customized and display an asterisk (*) next to the role's name in the Role dropdown.

Restoring Customized Role-Views to the Default Role-View Layout

The Restore Default button may be used to bring a customized role-view back to the Default role-view's layout.

- Select the customized role-view in the Role dropdown.
- Click "Restore Default" and save.

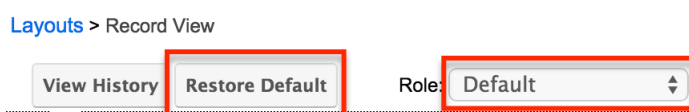


This will re-establish the link between the selected role-view and the Default role-view so that changes to the Default role will once again be automatically applied to the selected role-view. This will also remove the asterisk from the selected role-view's name in the Role dropdown since it is no longer considered customized.

Restoring the Default Role-View to the System Default Layout

The Restore Default button can also be used to bring the Default role-view back to the system stock record view layout.

- Select the Default role-view in the Role dropdown
- Click "Restore Default" and save.



This will remove any Studio changes to the layout so that it once again matches the system's stock layout. All other, non-customized role-views will also be updated to match.

Editing List View Layout



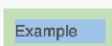
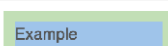
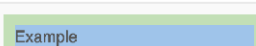
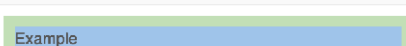
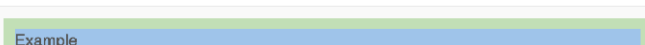
Unlike the Record View layout, the List View layout has columns where you can designate fields users can and cannot see. When configuring the List View layout, you will see three columns (Default, Available, Hidden) where fields can be dragged and dropped accordingly.

Please note that editing the List View layout affects the list of available fields for the module's list view dashlet (e.g. My Contacts) as well since both are controlled by the same layout (List View) in Studio. Once the appropriate configurations are made in Studio, the deployed changes will be reflected in the Columns field of the corresponding module dashlet's [Configuration Options](#) page. Keep in mind that the module dashlet will not automatically reflect the Studio changes and users must edit the dashlet in order to view the changes, add new fields to the layout, etc.

Administrators can easily set the column widths for specific fields when configuring the List View layout. You can choose from a pre-defined list of width sizes (e.g. small, medium, large, etc.) that are available out-of-the-box with Sugar or enter a custom width value in pixels (e.g. 200) for Sidecar modules.

Note: When defining the column width for currency fields (e.g. Likely, Best, etc.), only "large" and above will apply because there is a minimum width requirement in Sugar for this field type. In addition, when defining a custom width for currency fields, the value must be 141px or wider.

The following table lists the available column width sizes in Sugar along with the corresponding width in pixels: **Table column widths**

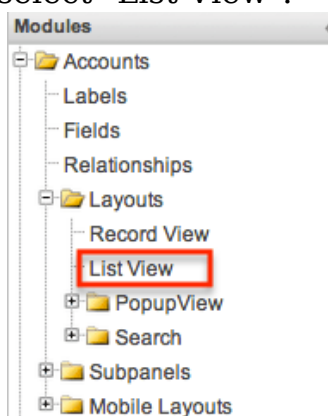
| Name | Width | Example |
|---------|-------|--|
| xxsmall | 21px |  |
| xsmall | 42px |  |
| small | 66px |  |
| medium | 110px |  |
| large | 178px |  |
| xlarge | 288px |  |
| xxlarge | 466px |  |

Note: The Search layout is also edited in the same fashion as the List View layout as it displays the Default column and Hidden column to designate fields. Only fields (stock and custom fields) listed in the Default column will be available to users when filtering module search in Sugar. In addition, changes made to the Search layout for Sidecar modules affects the list of available fields to filter for the module's list view dashlet (e.g. My Contacts) since it is controlled by the same layout as well.

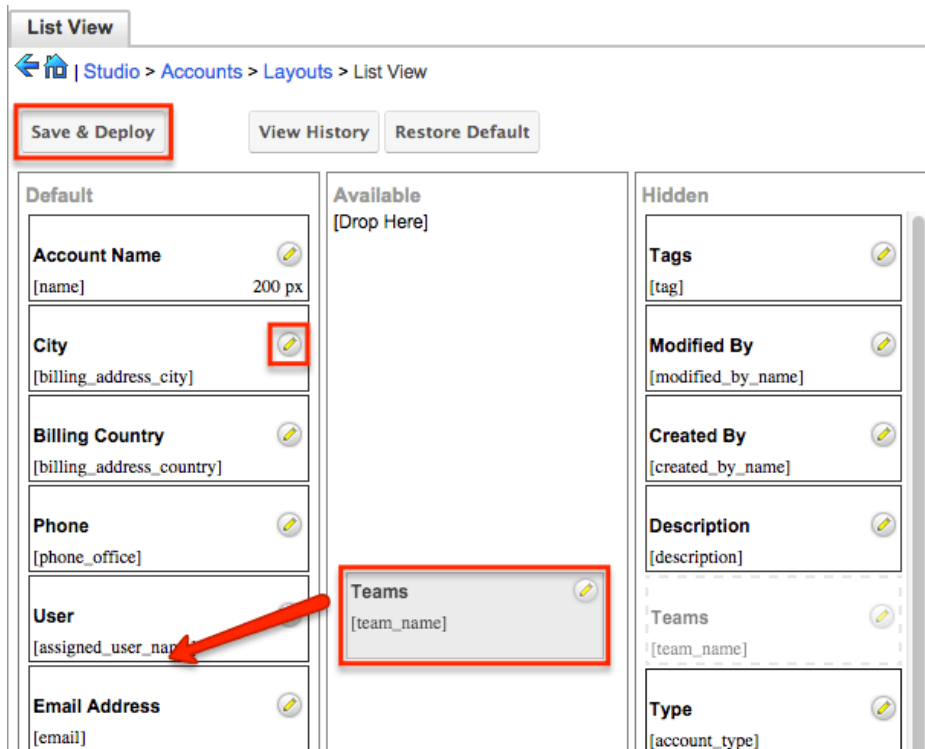
- Default : This column contains fields that are displayed in the layout.
- Available : Available fields are fields that will not show by default in the layout, but if the layout can be personalized, users can add these fields to their view of the layout. Not all list type layouts have an available fields section.
- Hidden : This column contains fields that will not be displayed in the layout.

The following steps cover editing the List View layout as an example:

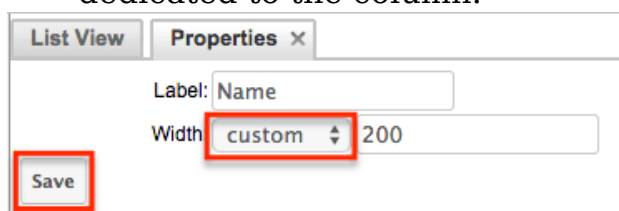
1. Expand "Layouts" from the Modules panel under the Accounts module and select "List View".



2. To add a field to the List View layout, drag and drop the fields from the Hidden column to the Default column.
 - Note: The fields in the Default column will be available to add as display columns in the corresponding module dashlet (e.g. My Accounts).



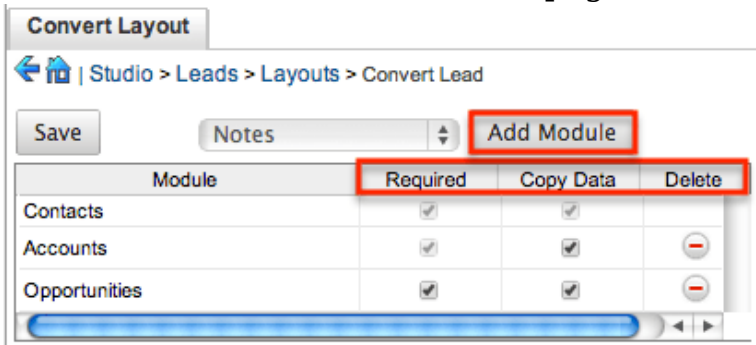
3. To remove a field from the layout, drag and drop the field from the Default column to the Hidden column.
4. To change the left-to-right order of the fields displayed on the list view, drag and drop fields up or down within the Default list.
 - Note: The order of fields designated for the List View layout also affects the order for the list of available fields in the corresponding module dashlet (e.g. My Accounts).
5. To modify the label of the field, as well as the width of the field, click the Pencil icon next to each field.
6. Enter the new label or select the width (e.g. small, medium, large, etc.) then click "Save". Please note the modified label will display in all List View layouts for this module.
 - Note: Administrators can choose from a pre-defined list of width sizes (e.g. default, small, medium, etc.). Please note that selecting the Default width will set the list view column to equal the Medium width size. Selecting "custom" from the list will allow you to enter a custom width value in the open box. The custom width value should be entered in pixels (e.g. 200) for Sidecar modules. Legacy modules should be entered as a percentage (e.g. 40) of the total width of the list view that should be dedicated to the column.



7. Click "Save & Deploy" to preserve your changes and deploy immediately.

Editing Convert Lead Layout

The Convert Lead layout in Sugar is structured differently from the other layouts as it is specific to the lead conversion page for the Leads module. Administrators can configure which modules are available to convert, mark modules as required, add modules to the Convert Lead page, etc.

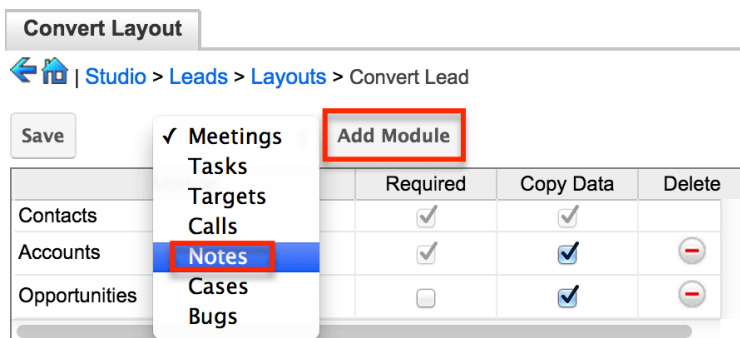


The following settings are available when configuring the Convert Lead layout:

- **Required** : Makes the module required during lead conversion. Required modules must be created or selected on the Convert Lead page in order for the lead to be converted and saved.
- **Copy Data** : Copies data from the Leads fields (stock and custom) to fields with the same name in the newly created record for the module.
 - Note: The field name and type must match between both modules (e.g. Leads and Accounts) in order for the data to copy over.
- **Delete** : Removes the module from the Convert Lead layout.

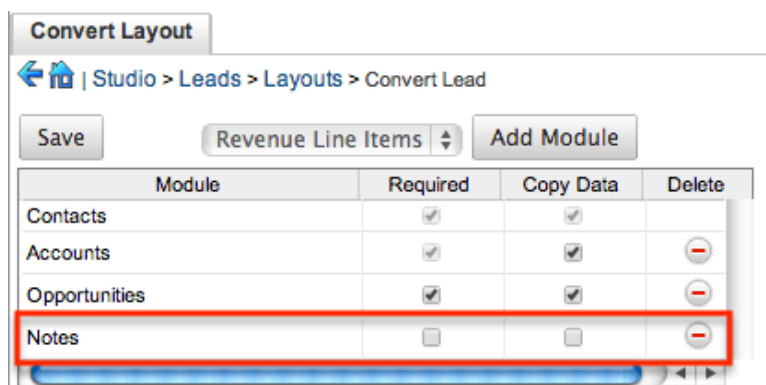
The following steps cover adding the Notes module to the Convert Lead layout:

1. Select the Notes module from the dropdown list above the convert lead table then click "Add Module".



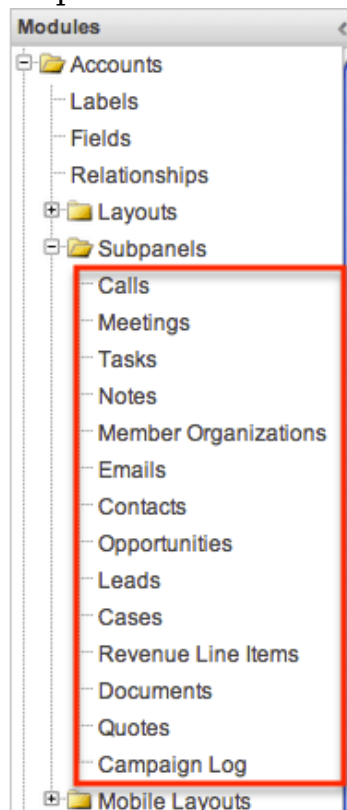
2. The Notes module will appear in the convert lead table and you can configure the settings as necessary. Click "Save" to preserve your changes.
 - Note: Modules added to the Convert Lead layout can be re-arranged by

dragging and dropping the row (e.g. Notes) within the table. The Contacts, Accounts, and Opportunities modules cannot be re-arranged on the layout.



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 you want displayed 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 and the available subpanels will appear. Please note that the list of available subpanels for each module will vary.

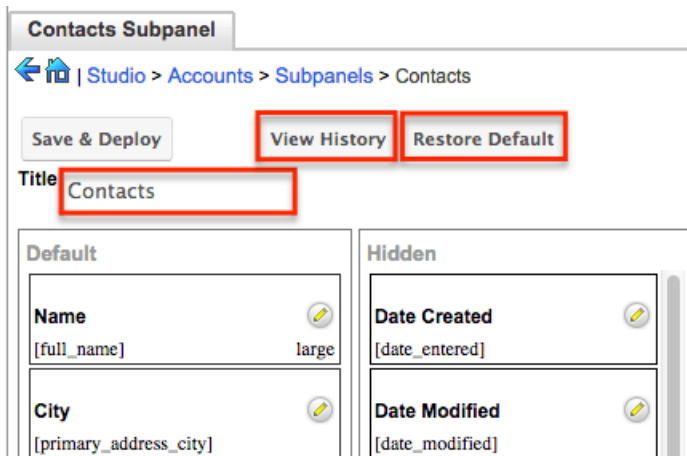


Subpanel Options

When configuring the Subpanel layout in Studio, there are options which allow you to change the subpanel title, view historical layout changes, as well as restore the default layout.

The following options are available when configuring subpanels in Studio:

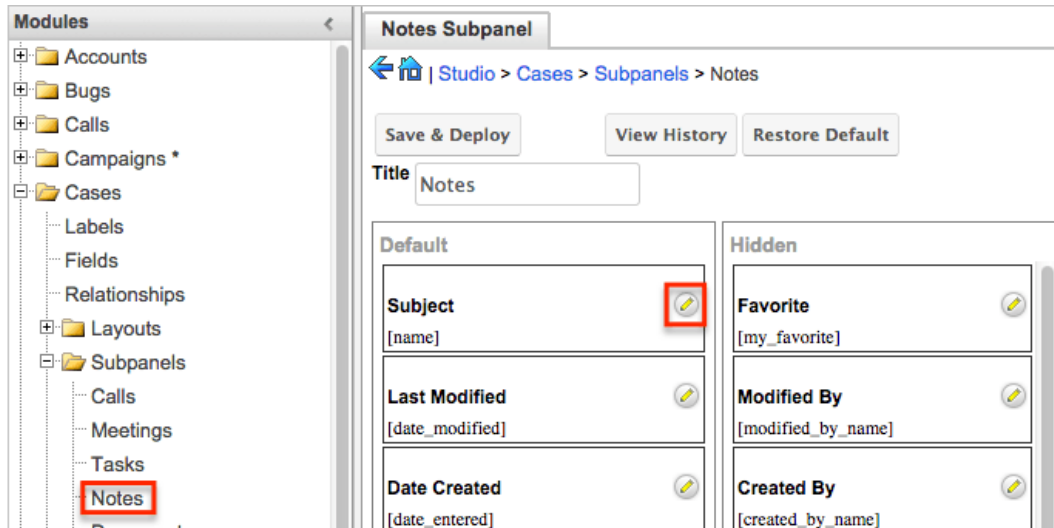
- **Subpanel Title** : Sugar administrators have the option to modify the name of the subpanel. This will change the display value of the subpanel when viewing the record view (for Sidecar modules) or detail view (for Legacy modules) of a record from the specified module.
- **View History** : Sugar keeps a history of the changes made to each subpanel. You can preview and restore historical layouts via "View History". For more information on viewing the history of subpanels, please refer to the [Viewing Layout History](#) section of this documentation.
- **Restore Default** : Restores the subpanel layout back to the default out-of-the-box layout. For more information on how to reset a subpanel to the default layout, please refer to the [Restoring Layout Defaults](#) section of this documentation.



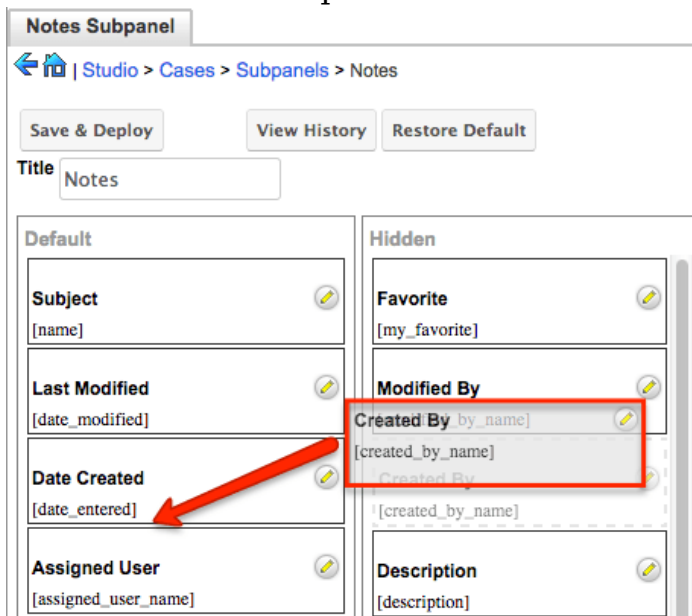
Editing Subpanels

The following steps cover editing the Notes subpanel for the Cases module as an example:

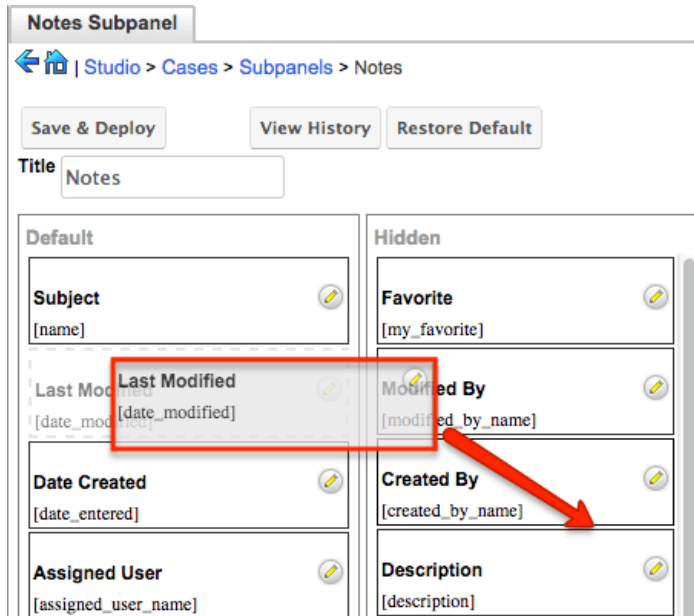
1. Expand "Subpanels" from the Modules panel under the Cases module and select "Notes". The Notes subpanel layout will display in the main panel to the right.



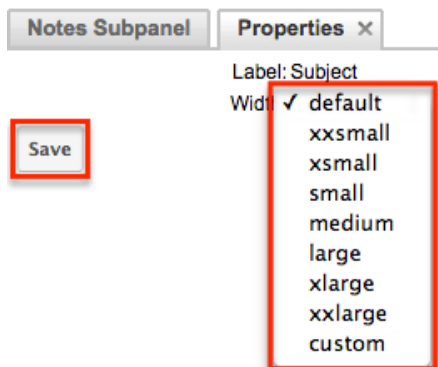
2. To add a field to the Subpanel layout, drag and drop the fields from the Hidden column to the Default column.
 - You can drag the field up and down the list to change the position of the field in the subpanel.



3. To remove a field, drag and drop the fields from the Default column to the Hidden column.



4. Click the Pencil icon to change the column width of the field in the subpanel.
 - Note: Administrators can choose from a pre-defined list of width sizes (e.g. default, small, medium, etc.). Please note that selecting the Default width will set the list view column to equal the Medium width size. Selecting "custom" from the list will allow you to enter a custom width value in the open box. The custom width value should be entered in pixels (e.g. 200) for Sidecar modules. Legacy modules should be entered as a percentage (e.g. 40) of the total width of the list view that should be dedicated to the column.
 - When defining the column width for currency fields (e.g. Likely, Best, etc.), only "large" and above applies because there is a minimum width requirement in Sugar for this field type. In addition, when defining a custom width for currency fields, the value must be 141px or wider.

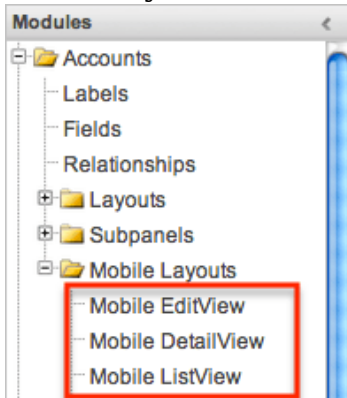


5. Click "Save & Deploy" to preserve your changes and deploy immediately.

Mobile Layouts

Mobile layouts are used to represent the views in SugarCRM Mobile. The mobile layouts section in Studio allows administrators to add fields and configure the various 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 under "Mobile Layouts".



Mobile Layout Types

There are various mobile layouts in Sugar to represent the different areas of the SugarCRM mobile application. Please note that 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 to modify or create records in the specified module.
- **Detail View** : Detail view layout is used 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 to view multiple records within the specified module. Only the first two fields in the list view section will be displayed in SugarCRM Mobile.

Mobile Layout Options

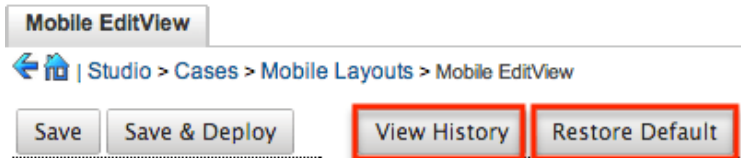
Administrators have the ability to configure the various mobile layouts available via Studio.

The following options are available when configuring mobile layouts in Studio:

- **View History** : Sugar keeps a history of the changes made to each layout. You can preview and restore historical layouts via "View History". For more

information on viewing the history of layouts, please refer to the [Viewing Layout History](#) section of this documentation.

- Restore Default : Restores the mobile layout back to the default out-of-the-box layout. For more information on how to restore the default layout, please refer to the [Restoring Layout Defaults](#) section in this documentation.
- Role : Mobile EditViews and DetailViews may be configured to display differently based on the viewing user's role. For more information, please refer to the [Creating Role-Based Record View Layouts](#) section.



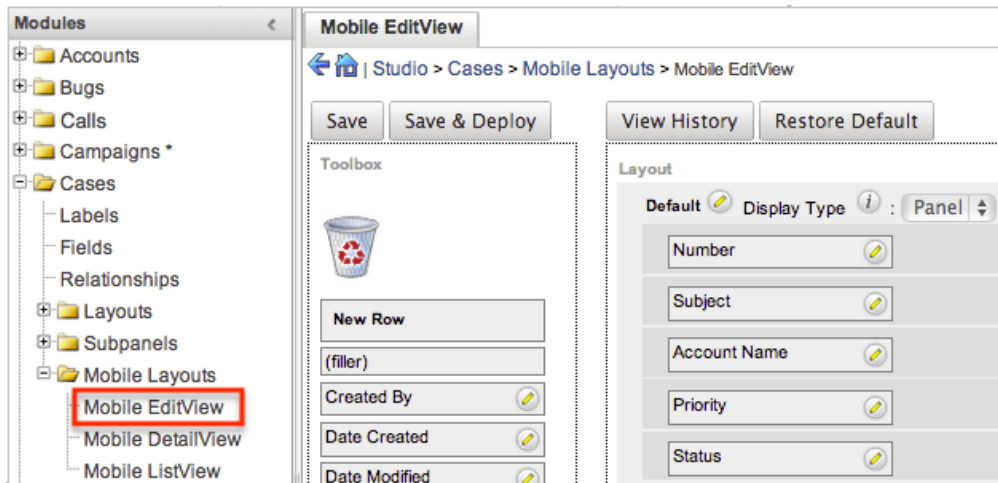
Editing Mobile Layouts

You can add, remove, hide, etc. the fields for the available layouts in "Mobile Layouts" by selecting the specific layout under the Modules panel to edit. Please note that the Mobile EditView and DetailView layouts are modified in similar fashions. The Mobile ListView layout has columns where you can designate fields users can and cannot see.

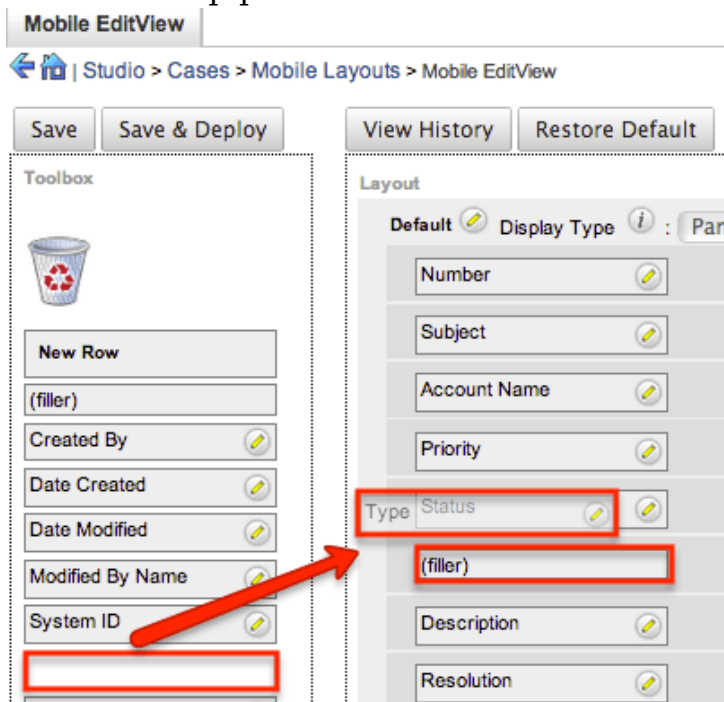
Mobile EditView and DetailView can both be configured to display customized layouts based on the viewing user's role. The availability and organization of fields may be altered to provide only the relevant fields for each user's role according to your business practices. For more information about configuring role-based layouts, please refer to the [Creating Role-Based Record View Layouts](#) section above.

The following steps cover editing the Mobile EditView layout for the Cases module as an example:

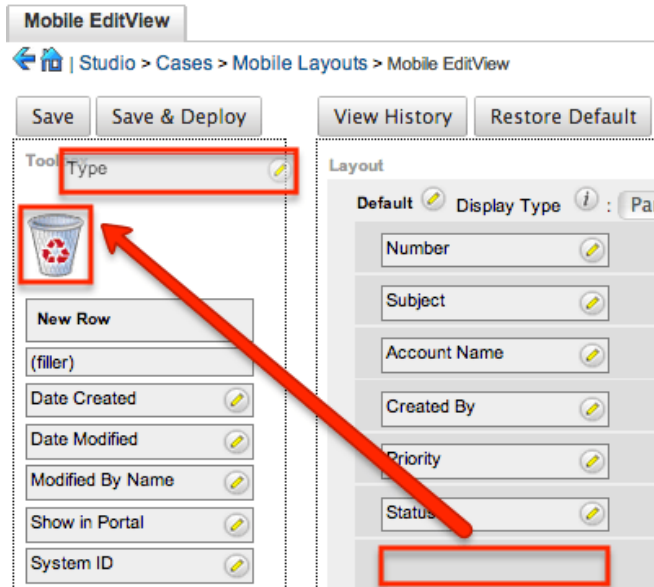
1. Expand "Mobile Layouts" from the Modules panel under the Cases module and select "Mobile EditView". The Mobile EditView layout will display in the main panel to the right.



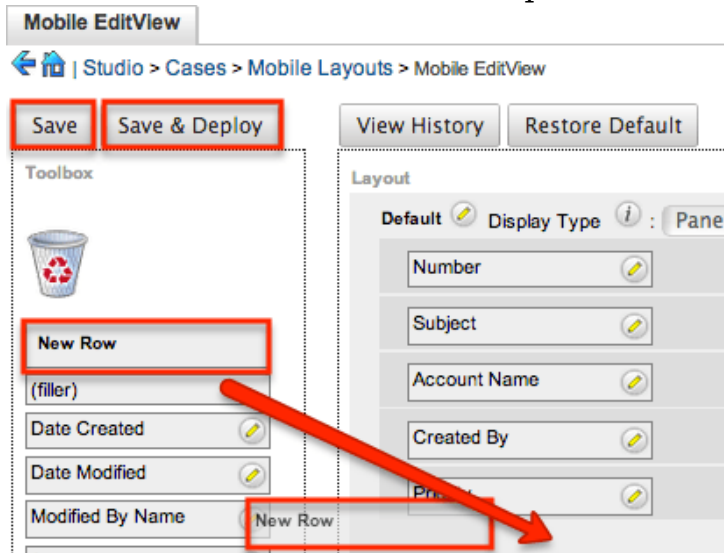
2. To add a field to the Mobile EditView layout, drag the field from the list of fields in the Toolbox to a "(filler)" location on the layout per your preference.
 - You can also drag a field to a location on the layout that already has a field in place. The newly added field and the existing field on the layout will swap places.



3. To remove a field from the layout, drag and drop the field from the layout to the trash bin in the Toolbox to remove the field from the layout. You may remove an entire row in the layout using the same method.



- To add a new row, drag the "New Row" item in the Toolbox to the layout to allow additional fields or blank spaces to be added.



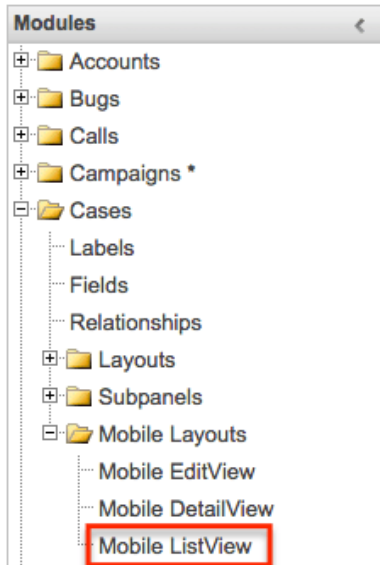
- Once the layout is finalized, click "Save" to preserve your changes or "Save & Deploy" to preserve your changes and deploy them instantly.

Unlike the Mobile EditView layout, the Mobile ListView layout has columns where you can designate fields users can and cannot see. When configuring the Mobile ListView layout, you will see three columns (Default, Available, Hidden) where fields can be dragged and dropped accordingly.

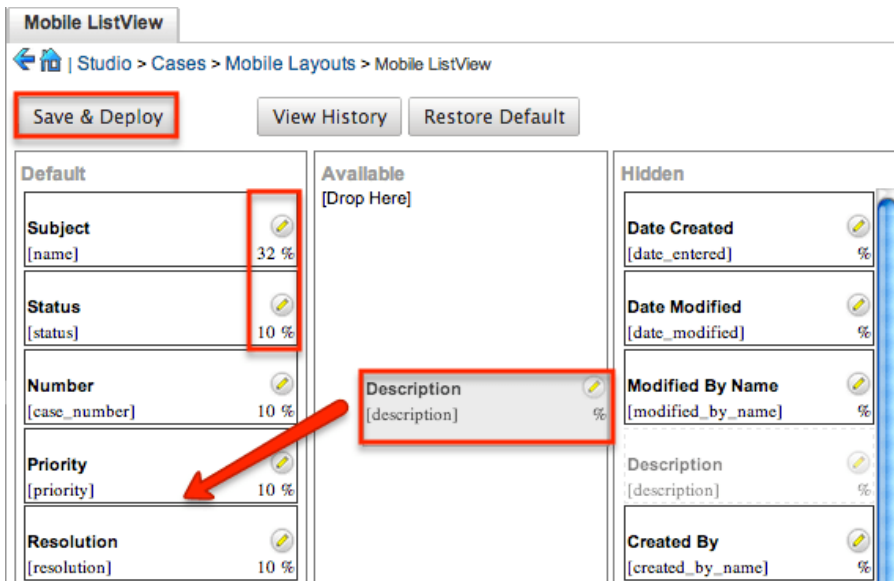
- Default : This column contains fields that are displayed in the list view.
- Available : Available fields are fields that will not show by default in the layout, but if the layout can be personalized, users can add these fields to their view of the layout. Not all list type layouts have an available fields section.
- Hidden : This column contains fields that will not be displayed in the list view.

The following steps cover editing the Mobile ListView layout as an example:

1. Expand "Layouts" from the Modules panel under the Cases module and select "Mobile ListView".



2. To add a field to the Mobile ListView layout, drag and drop the fields from the Hidden column to the Default column.



3. 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 view. Please note that the modified label will display in all List View layouts.
4. Click "Save & Deploy" to preserve your changes and deploy immediately.

Using Sugar Logic

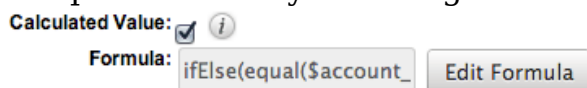
Sugar Logic allows administrators to write simple formulas and logic checks to provide a calculation for a field or to set the visibility of a field. For more

information regarding the types of fields you can use Sugar Logic in, please refer to the [Field Options](#) section of this documentation. A calculated field uses a formula to derive its value based on the values of other fields as well as mathematical or logical operators. A dependent field uses a formula to determine whether or not the field should be displayed. These formulas are automatically recalculated when the record is updated. In addition, when a record containing a formula's input field is updated, the formula is automatically recalculated.

Note: When creating a calculated formula for a Currency field, the currency symbol should not be used for a value (e.g. \$100) in the formula. The formula should only define the numeric value (e.g. 100), as including the currency symbol will result in improper calculated values.

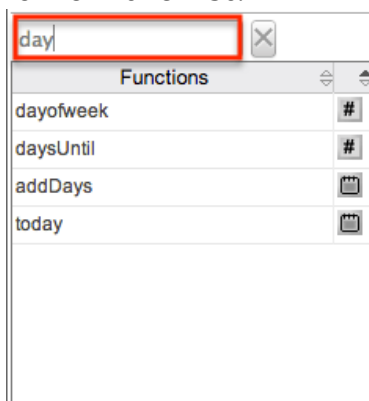
When a calculated or dependent field is created or its formula is modified, all existing records in the module will not use the new formula until they have undergone a save action. To update the existing records to use the new formula, the module's list view includes a Recalculate Value action. Admin users or users with developer-level access can use this feature to cause existing records to recalculate affected fields without having to perform an update on each record individually. For more information, please refer to the [User Interface](#) documentation in the Application Guide.

Administrators can access the formula builder for the fields and options that accept formulas by selecting "Edit Formula".



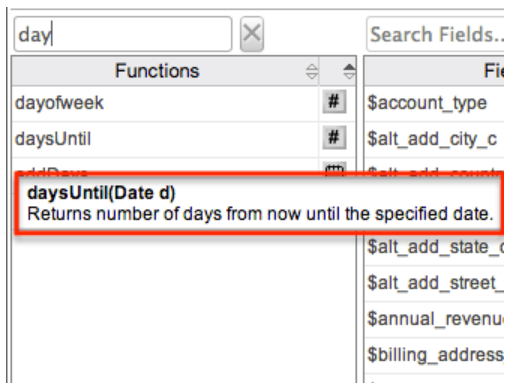
Functions

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, simply scroll through the list or enter the search criteria to narrow the list.

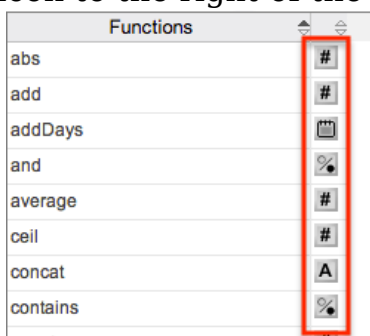


To see how to use a function and what the function does, simply hover over the

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 | Date \$param1 | Number |

| | | | |
|---------------------|---|--|---------|
| | of the day of week that \$param1 falls on. | | |
| daysUntil | Returns the 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 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 |
| hoursUntil | Returns the number of hours from now | Date \$param1 | Number |

| | | | |
|---------------|--|---|----------|
| | until \$param1. | | |
| 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 |
| | | | |

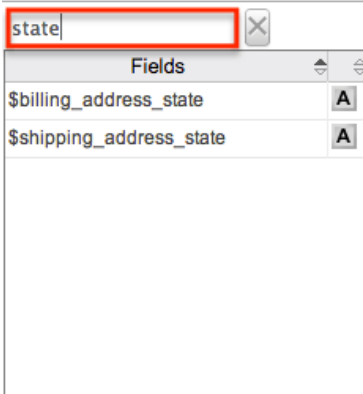
| | | | |
|----------------|--|-----------------------------------|----------|
| maxRelatedDate | Returns the highest value of \$field in records related to \$module. | Relate \$module, String \$field | Date |
| median | Returns the median of the given parameters. | Number \$param1, ... | Number |
| 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, 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 | Relate \$module, | Number |

| | | | |
|------------|---|---|--------|
| | average value of \$field in records related to \$module. | String \$field | |
| 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 |
| timestamp | Returns the passed in datetime string as a unix timestamp. | | Date |
| 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

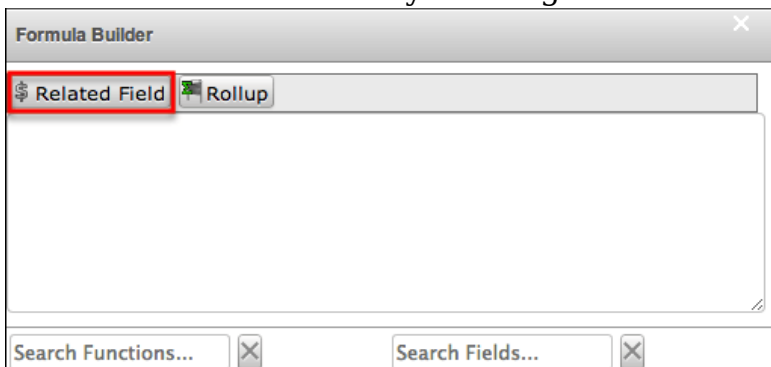
Fields are listed on the bottom right hand corner of the formula builder and contain the fields for the current module. Fields can be referenced in formulas and will start with a \$. To locate the field you need, simply scroll through the list or enter a search criteria to narrow the list.



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.

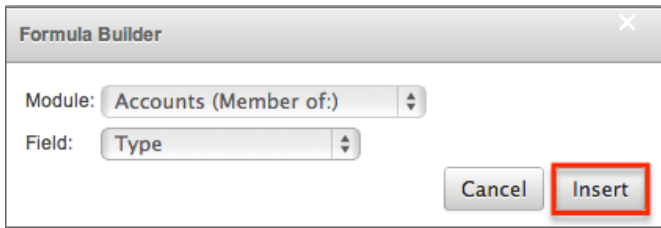
Related Field

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".

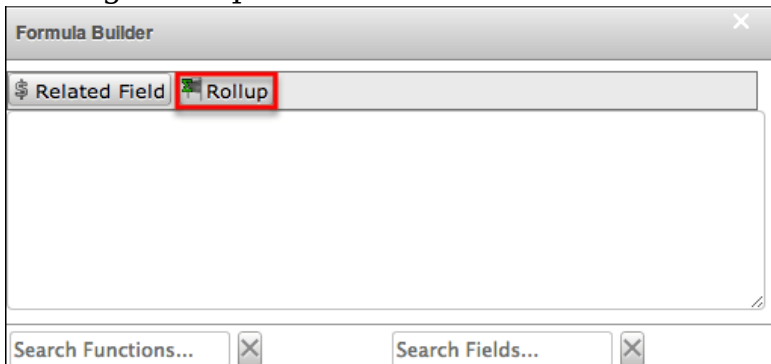


The resulting syntax for the selected options will be added to the formula.

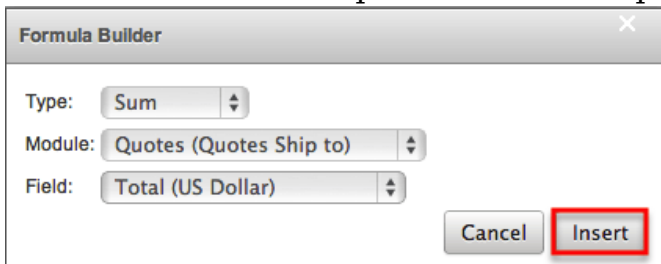
Note: If a record has multiple related records to a module, the related function will pull the field from one of the related records. It is not recommended to rely on the related function to pull the same related records for a many relationship.

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 (Sum, Average, Minimum, or Maximum) to perform on the module field. 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".



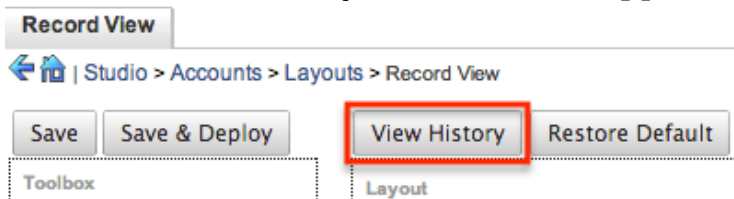
The resulting syntax for the selected options will be added to the formula.

Note: Rollup functions can only aggregate number type fields.

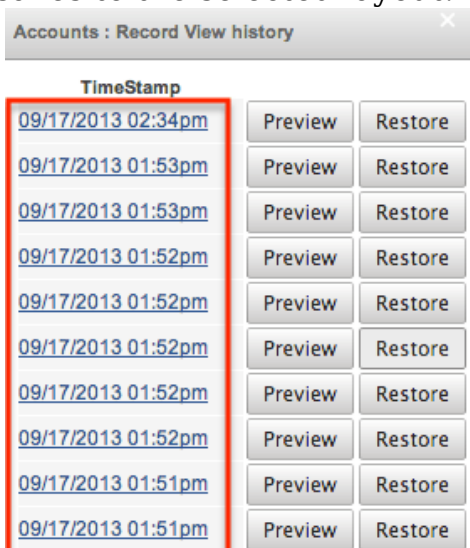
Viewing Layout History

Layouts, subpanels, and mobile layouts in Studio keep a history of the last ten changes made to the specific layout. To view the history for any of these layouts, simply select "View History" from the Record View (for Sidecar modules), List View, Edit View (for Legacy modules), etc. layout in Admin > Studio. The following steps cover viewing the layout history for the Record View layout as an example:

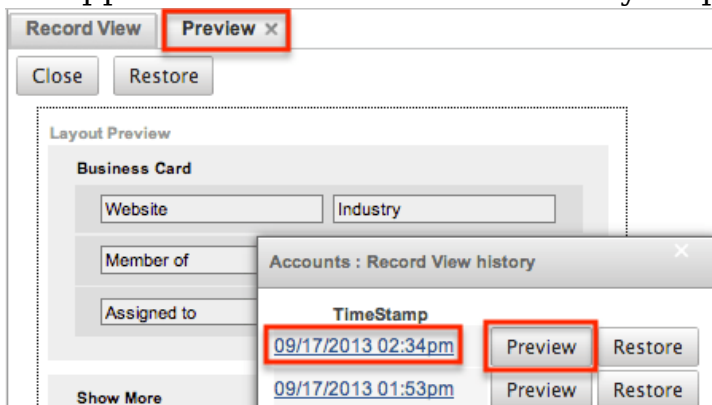
1. Navigate to the [Record View](#) layout in Admin > Studio.
2. Click the View History button on the upper left of the layout editor.



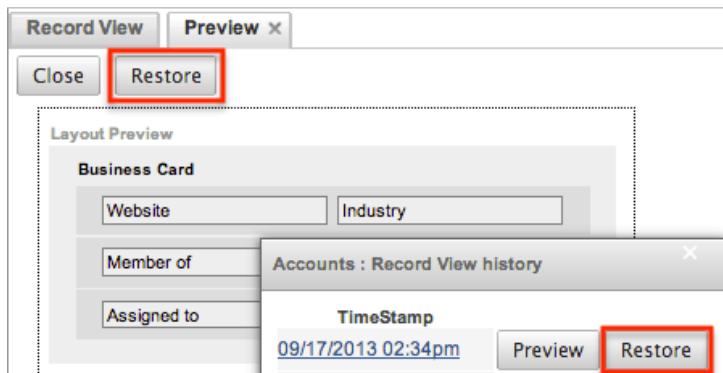
3. The History dialog box will appear showing the timestamps of the last ten saves to the selected layout.



4. Click the timestamp or Preview button and a preview of the modified layout will appear in a new tab of the main layout panel.



5. To restore a specific layout per the history, click the Restore button within the Preview layout or from the History dialog box.

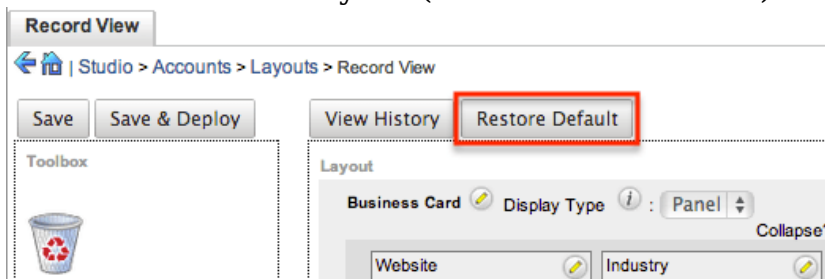


The chosen Record View layout will load into the editor and you may make appropriate changes to the layout as you wish. Click "Save" to preserve your changes or "Save & Deploy" to preserve your changes and deploy immediately.

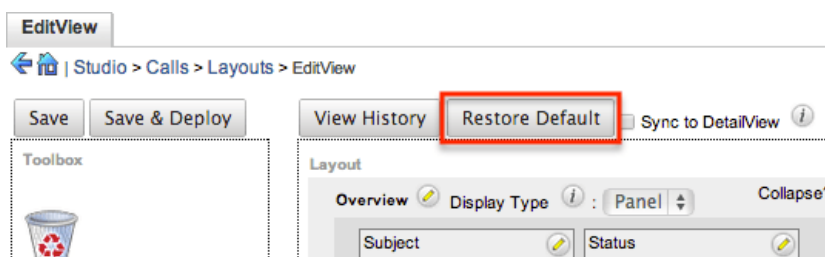
Restoring Layout Defaults

Various layouts in Studio can be restored back to the default out-of-the-box configuration, which will revert all changes made to the specific layout (e.g. list view, record view, etc.). To restore the default layout, simply click the Restore Default button from the Record View (for Sidecar modules), List View, Edit View (for Legacy modules), etc. layout in Admin > Studio.

From Record View layout (for Sidecar modules) :



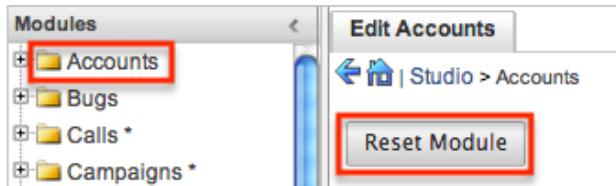
From Edit View layout (for Legacy modules) :



The default layout will load into the editor and you may make appropriate changes to the layout as you wish. Click "Save" to preserve your changes or "Save & Deploy" to preserve your changes and deploy immediately.

Resetting Modules

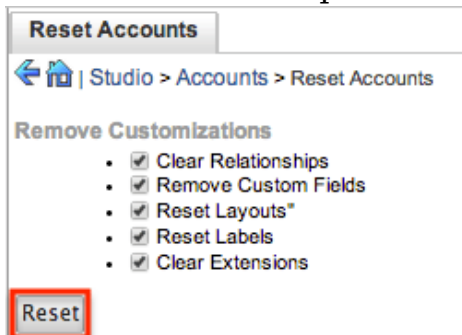
Sugar comes with the ability to reset an entire module back to the default settings. You can also pick and choose which customizations you would like to remove. To reset a module, select the module from the Modules Panel and click "Reset Module" in the Main Panel.



The next screen will give you the following options to remove specific customizations:

- Clear Relationships : Deletes all relationships added via Studio.
- Remove Custom Fields : Deletes all fields added via Studio.
- Reset Layouts : Resets the layouts back to the out-of-the-box configuration. 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 the default. Deletes the module folder located in `./custom/Extension/modules/`.

Select the desired options and click "Reset" to execute the reset.

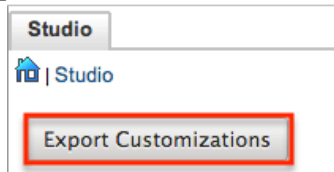


Exporting Customizations

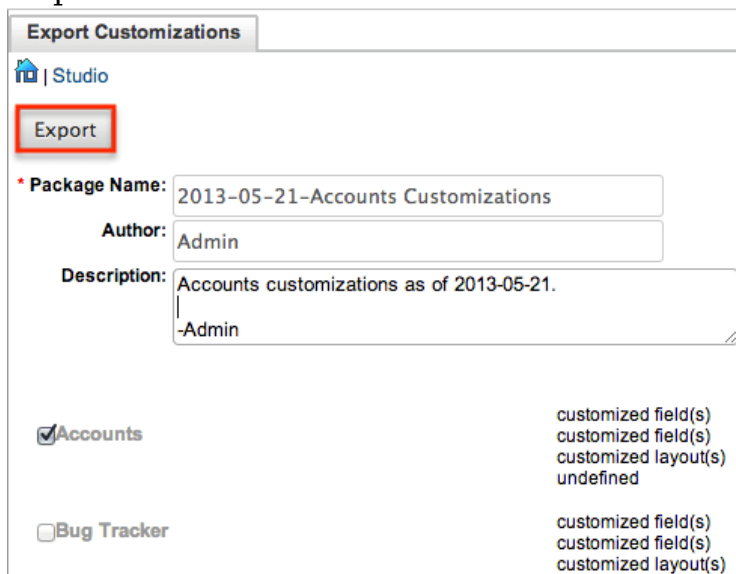
Sugar allows you to export a module's customized layouts, fields, and field labels from one Sugar instance to import into another Sugar instance. To do this, you will need to package the customizations in Studio, export it to your local machine, and then upload it into another Sugar instance. The system 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".

A screenshot of the 'Export Customizations' form. At the top, there is a tab labeled 'Export Customizations'. Below it, there is a home icon and the text '| Studio'. In the main content area, there is a button labeled 'Export' which is highlighted with a red rectangular box. Below the button, there are three input fields: 'Package Name' with a red asterisk, 'Author', and 'Description'. The 'Package Name' field contains the text '2013-05-21-Accounts Customizations'. The 'Author' field contains the text 'Admin'. The 'Description' field contains the text 'Accounts customizations as of 2013-05-21.' and '-Admin'. Below the input fields, there are two checkboxes: 'Accounts' (checked) and 'Bug Tracker' (unchecked). To the right of the 'Accounts' checkbox, there is a list of items: 'customized field(s)', 'customized field(s)', 'customized layout(s)', and 'undefined'. To the right of the 'Bug Tracker' checkbox, there is a list of items: 'customized field(s)', 'customized field(s)', and 'customized layout(s)'.

4. The customizations are saved to your computer in a zip file that can be loaded into a different instance of Sugar via the module loader. For more information regarding installing packages, please refer to the [Module Loader](#) documentation.

Last Modified: 01/23/2017 04:54pm

Module Builder

Overview

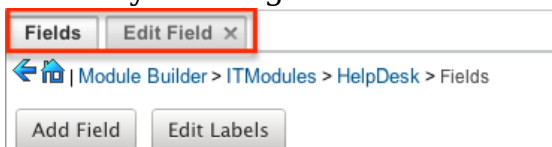
Module Builder enables administrators to create, deploy, and maintain custom modules in Sugar. Modules can be created in Module Builder and then deployed within your instance of Sugar or exported for additional development and deployment to other instances of Sugar. This is convenient for testing new modules and for distributing a module to many different instances. Please note that only users with administrator or developer access can create and manage custom modules via 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

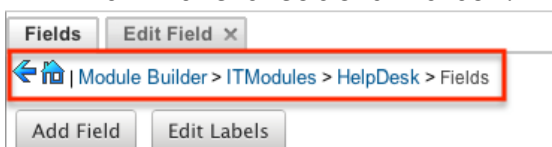
Sugar's Module Builder is divided into three main sections which consist of the main panel, packages panel, and footer. You can easily create, access, and manage the custom modules via the main panel and Packages panel. The footer of Module Builder allows you to access different areas (e.g. Studio, Dropdown Editor) of the Developer Tools section by clicking the corresponding buttons at the bottom of the page.

Main Panel

The main panel in Module Builder is where you can create a new package, access existing packages, deploy a package, etc. As you create and configure the module(s) within the package, the various sections (e.g. layouts, fields, etc.) you access will open inside tabs on the main panel. Additional tabs that open up can be closed by clicking the "X" within the tab.



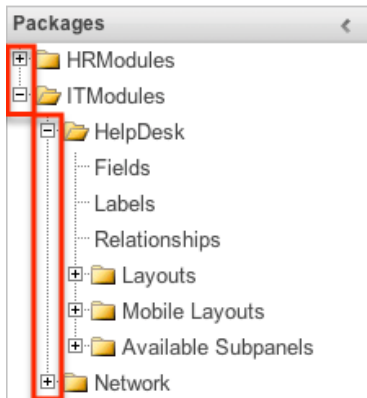
The main panel also displays the breadcrumbs bar showing where in Module Builder you currently are. You can navigate to a specific section by clicking the link within the breadcrumb bar.



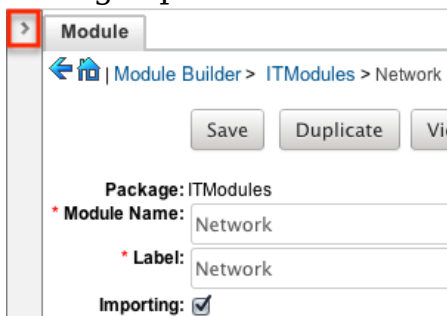
To go back to the previous page you were viewing, click the Left arrow on the breadcrumbs bar. Clicking the Home icon will navigate you back to the Developer Tools home page.

Packages Panel

The Packages panel is located to the left of the main panel and displays a list of existing packages and associated custom modules that are accessible via Module Builder. The custom modules are grouped under a package and the fields, layouts, subpanels, etc. specific to each module appear when you expand out the tree for the module.

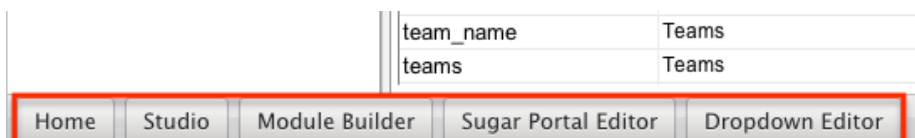


Select an item in the Packages panel to load it into the main panel. Please note that if you do not see the Packages panel, it may be collapsed. Simply locate the gray bar to the left of the main panel and click the Right arrow to expand the Packages panel.



Footer

The footer is located on the bottom left of Module Builder and displays buttons which enable you to navigate to the different areas (Studio, Dropdown Editor, etc.) 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 Developer Tools |
| Studio | Navigates to the home page of Studio |
| Module Builder | Opens Module Builder to create and manage custom modules |
| Sugar Portal Editor | Opens the Sugar Portal Editor to configure the Portal |
| Dropdown Editor | Opens the Dropdown Editor to create and edit dropdown lists |

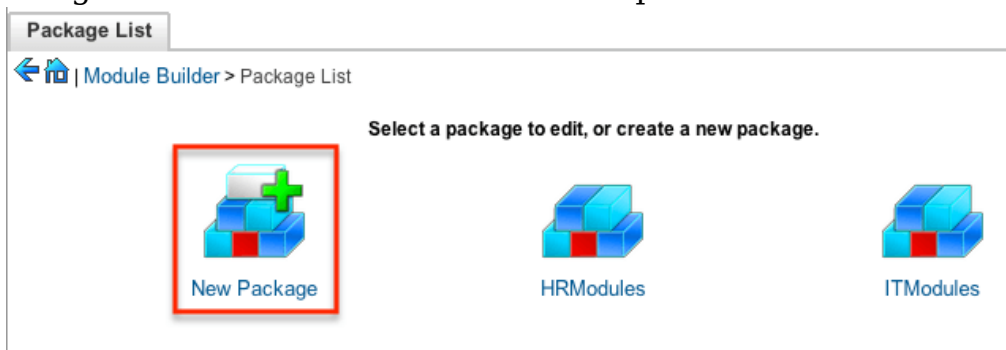
Packages

Packages in Module Builder allow you to create and house multiple modules of different types. Please note that a package must first be created in order to create a custom module via Module Builder. While packages can be useful to group similar or dependent modules together to ensure they are deployed together, it is generally recommended that a separate package be created for each module. This can help prevent potential issues down the road since if you ever need to uninstall a module and it is part of a larger package, then all modules in that package must be uninstalled. Keeping modules isolated to their own package allows greater flexibility in the future if a module is no longer needed.

Creating Packages

Use the following steps to create a new package via Module Builder:

1. Navigate to the Module Builder's main panel 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 "Readme" to display an open text box where you can enter additional information about the package or modules contained in the package.

Note: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".

Package

Module Builder > New Package

Save

* Package Name: FinModules

Author: Admin

* Key: FIN

Description:

Readme

Deploying Packages

Once the package is created and saved, you can create custom modules by clicking the New Module icon. Please note that the package must contain at least one module in order to properly publish and deploy the package, as well as export the customizations. There are various options (e.g. deploy, publish, export, etc.) available when viewing the package which allow you to perform various actions.

Package

Module Builder > FinModules

Save Duplicate Deploy Publish Export Delete

Last Modified: 09/26/2013 11:17am

* Package Name: FinModules

Author: Admin

* Key: Fin

Description:

Readme

Modules:

New Module

The Package options allow you to perform the following operations:

| Action | Description |
|---------|---|
| Save | Click "Save" to preserve any changes made to the Package details (Package Name, Author, etc.). |
| Deploy | <p>Installs the package into the current instance. Any modules in the package will be created or updated in the current instance.</p> <p>Note: Do not re-deploy a package once deployed from Module Builder as any workflows, code level customizations, or changes made through Studio for the custom modules will be lost. It is recommended that module packages be deleted from Module Builder after a successful deploy to avoid an accidental re-deploy. Please use Studio to perform any additional configurations to your module once deployed.</p> |
| Publish | <p>Saves the package into an installable zip file containing all customizations. Upload the file via Module Loader to install the package into a different instance.</p> <p>Note: Packages created on Ultimate editions of Sugar can only be installed on instances running Ultimate editions of the same version.</p> |
| Export | <p>Saves the package into an importable zip file containing all customizations. Upload the file via Module Loader to view the package in Module Builder on a different instance where it can then be further developed and deployed.</p> <p>Note: Packages developed on Ultimate editions of Sugar can only be installed on instances running Ultimate editions of the same version.</p> |

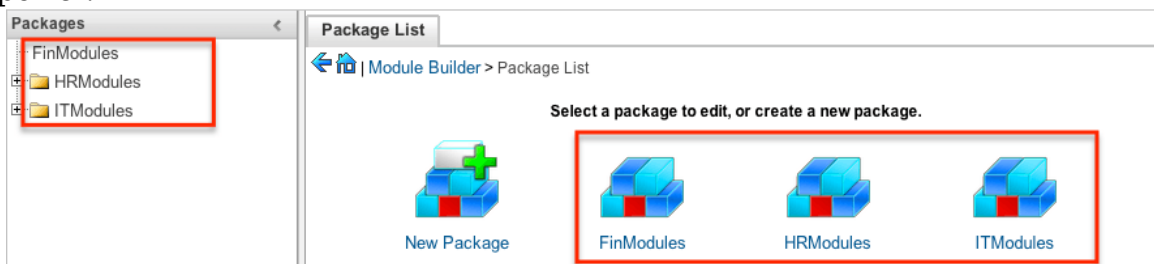
Deleting Packages

If a package is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from Module Builder. Please note that deleting a package will delete all files contained in the package, but will not remove the package from any instance where the package was deployed. For more information on how to uninstall a deployed package from an instance, please refer to the [Module Loader](#) documentation in the Administration guide.

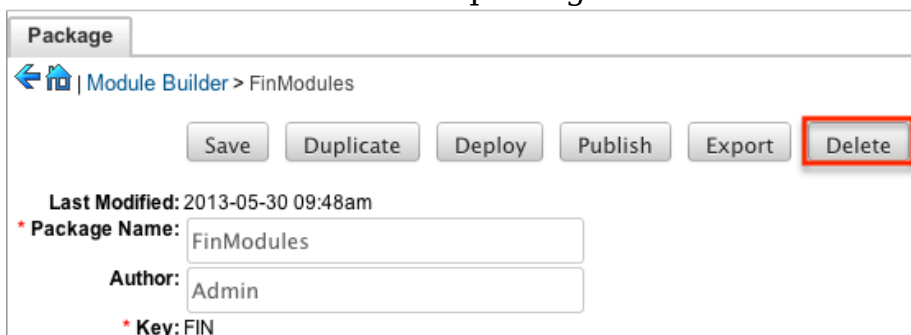
Note: We recommend deleting packages from Module Builder after they have been deployed in a production instance to prevent it from accidentally being re-deployed. The only exception to this rule is in a development environment as you may want to continue working and testing until you are ready to move the module to your production environment.

Use the following steps to delete a package via Module Builder:

1. Select the desired package from either the Packages panel or from the main panel.



2. Click "Delete" to remove the package.



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

Modules

Various types of modules can be created and configured within the package in Module Builder. Although multiple custom modules can be created in a package, it is generally recommended that only one module be created per package. This will help prevent potential issues down the road and allow greater flexibility in the

future if a module is no longer needed.

Note: Activity streams are not available for custom modules.

Module Types

Module Builder comes with a few predefined module templates for creating modules. Select the module type that best fits your organization's use of the new module and then customize the module to further fit 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 modules in Module Builder, the following options are available to complete when setting it up:

- **Module Name** : The name (e.g. HelpDesk) or designation of the module. The module name is what displays in the Packages Panel as well as in Studio after deploying.
- **Plural Label** : The plural label (e.g. HelpDesks) for the module name. The label is what displays when using the module within Sugar.
- **Singular Label** : The singular label (e.g. HelpDesk) for the module name. The label is what displays when using the module within Sugar.
- **Importing** : Select this option to enable importing for the module.
- **Team Security** : Select this option to enable team security for the module. If this option is unchecked, records in this module will not be assigned to a team and will be restricted by roles only. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide.
- **Navigation Tab** : Select this option to add the module and module actions to the navigation bar.
- **Type** : Select the module type to use as a template when building the module. Each module type includes a list of stock fields by default which can be added and removed in the layout as necessary. Please note that the module type can only be selected when initially creating the module. For more information regarding the module types, please refer to the [Module Types](#) section of this documentation.

Creating Modules

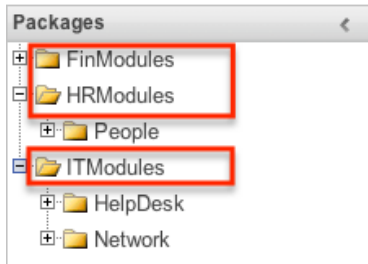
While you have the option to create multiple types of modules within a package, it is generally recommended that only one module be created per package. Doing so will help prevent potential issues down the road and allow greater flexibility in the future if a module is no longer needed.

Creating Modules Via Package

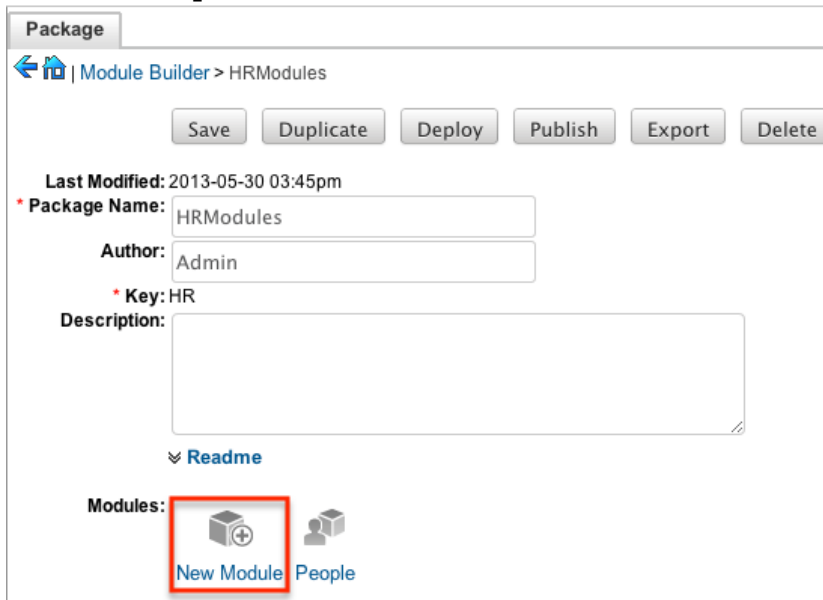
One of the most common methods of module creation is via the New Module option in the package. When the New Module icon is selected, it opens up the New Module screen which allows you to enter in the module's details (e.g. name, label, etc.) as well as select the module type you wish to use as a template.

Use the following steps to create a custom module in the package:

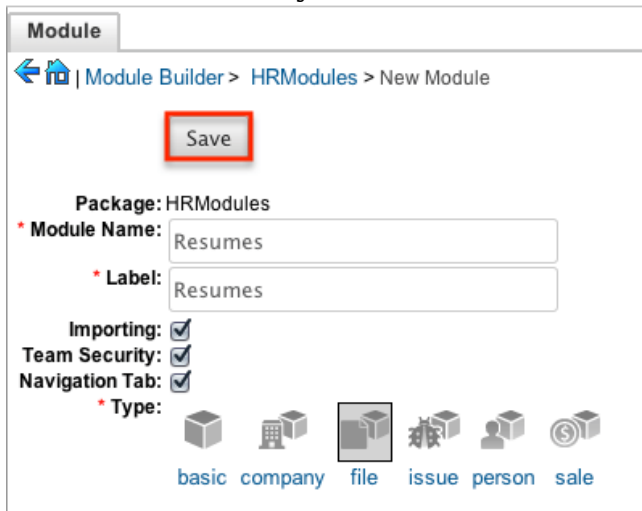
1. Select a package from the Packages Panel to create a new module.



2. In the main panel select "New Module".



3. Enter the appropriate values for the [Module options](#). All required fields are marked with a red asterisk and must be completed prior to saving.
4. Select a module type (e.g. file) to use as a template when configuring your module.
5. 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

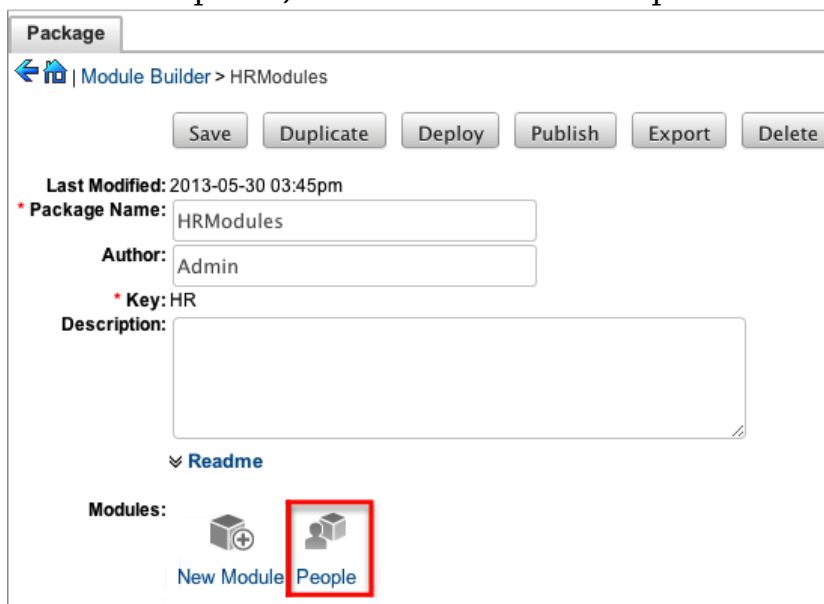
package. The duplicate option is useful if the module you are creating has similar information or structure to an existing module.

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

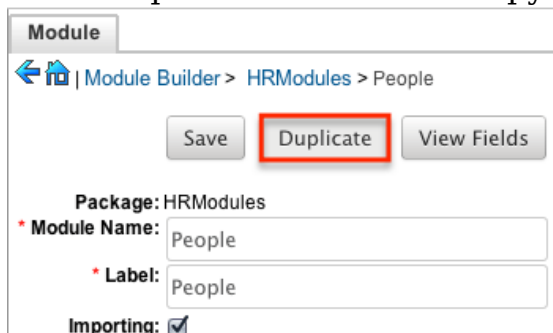
1. Select a package from the Packages panel to create a new module.



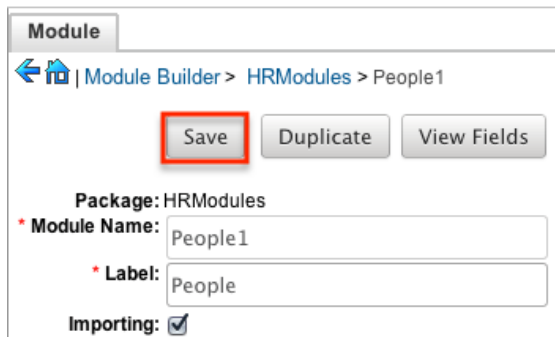
2. In the main panel, select a module to duplicate.



3. Click "Duplicate" to create a copy of the module.

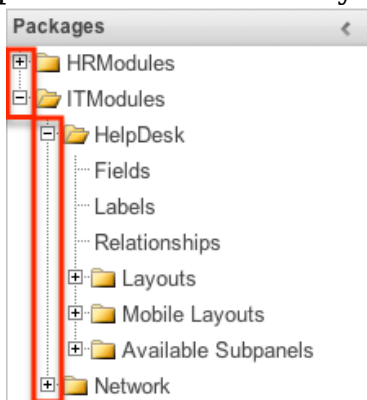


4. The selected module is duplicated to a new module with a "1" appended at the end of the module name. Update the necessary fields, then click "Save".



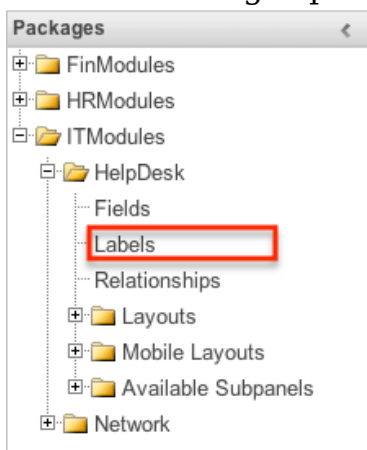
Modifying Modules

The associated fields, labels, layouts, subpanels, etc. for each module can be modified within each package. Click the plus sign (+) preceding the module name to expand the module and view the associated items (e.g. Layouts, Fields, etc.). Selecting the module from the Packages panel will load the view into the main panel. You can modify the [Module options](#) for the selected module via this page.

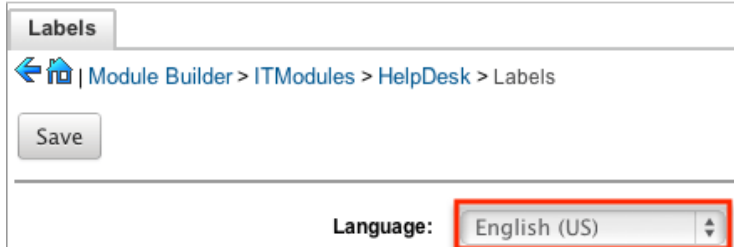


Modifying Labels

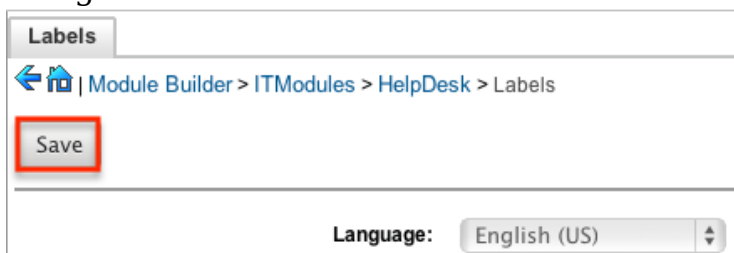
Labels are used throughout Sugar for items like buttons, field headers, subpanel titles, error messages, and more. To modify the labels for a module, select "Labels" from the Packages panel under the desired module.



The Labels tab will open up in the main panel where you can change the names for specific labels associated to the module. Please note that you can also define the primary language to use per the language packs currently installed in Sugar when changing the labels. Select the desired language from the dropdown to view and modify the labels according to that language.

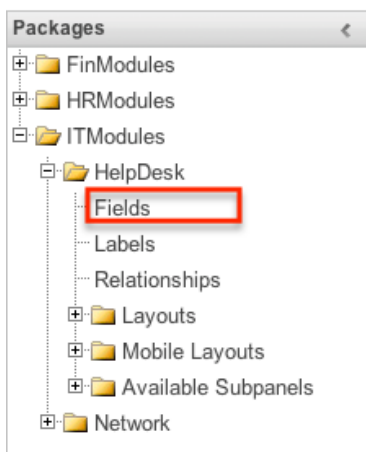


Modify the labels for the selected language and click "Save" to preserve your changes.



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 and the view will open up in the main panel to the right.



Field Types

The Fields section for each module contains a number of stock fields which come out-of-the-box with Sugar. Please note that each data type has various options and

properties available to configure.

The following data types are available to be added to modules in Module Builder:

| 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 at once. |
| 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 an open text area 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 display as a link. |


Field Options

Fields provide ways to store different data types in Sugar. While many fields come out-of-the-box with Sugar by default, there can be instances where your organization needs to store additional data.

When creating or modifying fields via 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 field properties and options are available in Sugar:

- **Audit** : Select this checkbox to audit the field for changes made in Sugar.
 - Users can view the changes made to audited fields via the View Change Log option in the module's record view (for Sidecar modules).
 - Note: The Audit option is available for all data type fields.
- **Border** : Select this checkbox to add a border around the image for this field.
 - Note: 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.
- Note: 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.

-
- Note: The Columns option is only available for TextArea data type fields.

Comment Text : Enter a comment or description about the field. The comment text is only viewable via Module Builder and Studio.

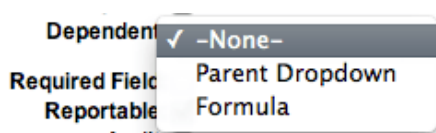
- Note: The Comment Text option is available for all data type fields except Flex Relate.

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 record view layout, but can be modified by users.

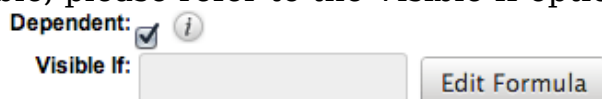
- Note: The Default Value option is available for all data type fields except HTML, Image, Flex Relate, and Relate.

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 as shown below. Selecting "Formula" will open the Visible If option to create a dependency formula. For other field data types (e.g. Date), 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.



- Note: 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.

- Note: 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. Normally defaults to the Field name entered when creating the field.

- This value is also modifiable in the packages panel under [Labels](#).
- Note: 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 associate to the field.

Drop Down List: 

- Only values in the chosen list will be available for selection in the field. Click "Edit" to change the values for the currently selected list, or click "Add" to create a new list.
- Note: The Drop Down List option is only available for the DropDown, MultiSelect, and Radio data type fields. For more information on editing dropdown values via the Dropdown Editor, please refer to the [Editing Dropdown Lists](#) section of the Developer Tools documentation.

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.
- Note: The Duplicate Merge option is available for all data type fields except Image.

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.
- Note: 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 list. 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.
- Note: The Full Text Searchable option is only available 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 and change the formula. For more information on how to build a formula using the formula builder, please refer to the [Using Sugar Logic](#) section of this documentation.

Calculated Value: 

Formula:

- Note: 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.

Generate URL:

Default Value:

- This is useful for providing links or iFrames to internal systems such as an ERP or to external systems such as Google Maps.
- 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.
- Note: The Generate URL option is only available for IFrame and URL data type fields.

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.

- Note: 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 when users hover their mouse on the field in record view.

- Note: 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



- Note: 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.

- Note: 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".

- Note: 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.

- Note: 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.

- Note: 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 enters a higher value in the field than the specified value, a notification will appear upon save informing them of the set maximum value.

- Note: 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 enters a value in the field that is lower than the specified value, a notification will appear upon save informing them of the set minimum value.

- Note: The Min Value option is only available for Integer data type fields.

Module : Select a module from the dropdown to relate to the current module.

- 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 chosen module cannot be modified once the field is created.

Module:

- Note: 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.
- Note: 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.

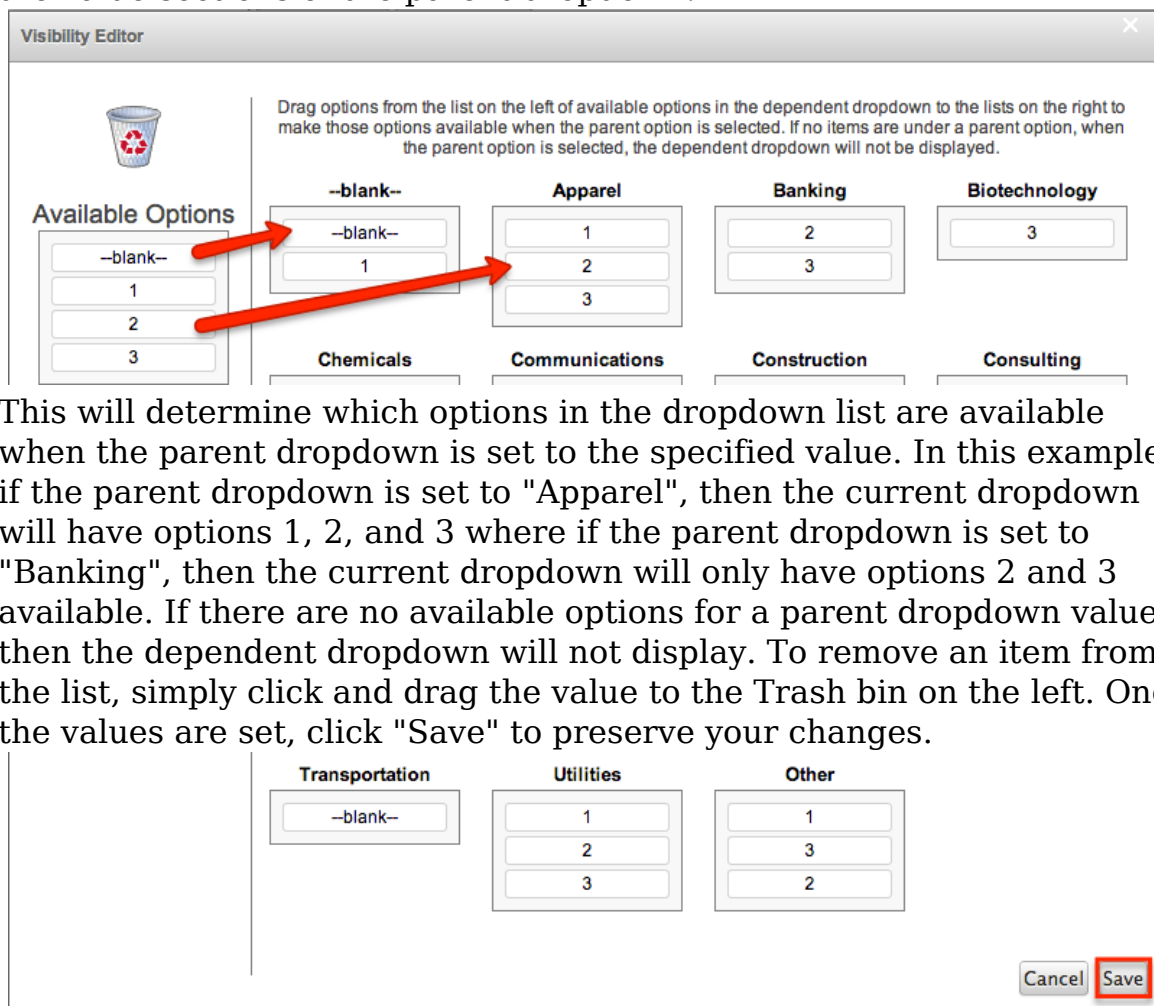
Dependent:

Parent Dropdown:

- Note: The Parent Dropdown option is only available when the Dependent option has "Parent Dropdown" selected.

- 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 dependent dropdown will not display. To remove an item from the list, simply click and drag the value to the Trash bin on the left. Once the values are set, click "Save" to preserve your changes.

Precision : Enter a number to specify the number of digits to the right of the decimal point the value should be stored as in Sugar.

- Note: The Precision option is only available for Decimal and Float data type fields.

Reportable : Select this checkbox to allow the field to be used in reports.

- Note: The Reportable option is available for all data type fields except Encrypt, Flex Relate, HTML, IFrame, and Image.

Required Field : Select this checkbox to mark the field as required in Sugar. The user will be required to enter a value for the field before saving the record.

- Note: The Required 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.

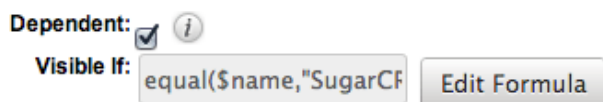
-
- Note: The Rows option is only available for TextArea data type fields.

System Label : Enter the system value for storing the label of the field. This is defaulted to the name of the field preceded by "LBL". Any lowercase characters entered will be converted to an uppercase upon saving. Once the field has been created, the system label cannot be changed.

- It is recommended that administrators avoid naming fields with the same system label in order to prevent the same label and header values from existing in the system.
- Note: 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.



- 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 of this documentation.
- Note: The Visible If option is only available when the Dependent option is checked or "Formula" is selected from the dropdown.

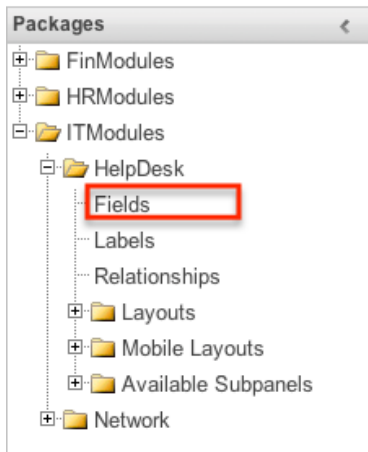
Width : Enter the number of pixels to horizontally scale the image for this field. Enter only the Width or Height options to retain the aspect ratio of the image.

- Note: The Width option is only available for Image data type fields.

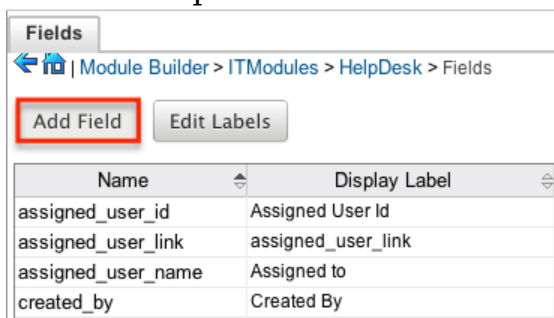
Creating Fields

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".

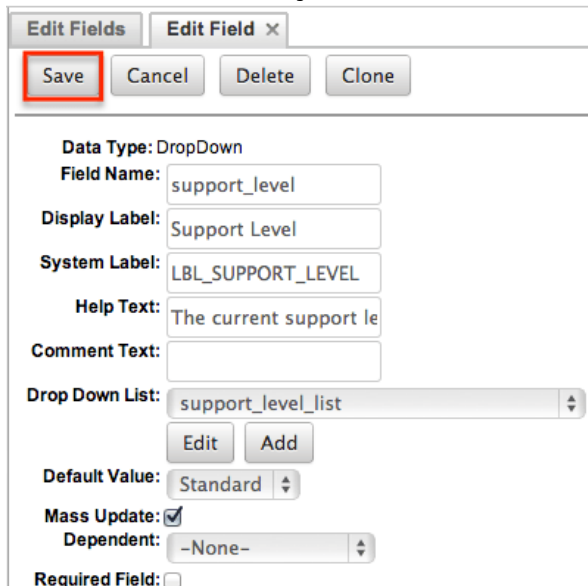


2. In the main panel click "Add Field".



3. Enter appropriate values for the [Field options](#). Please note that Field Name is required.

4. Once the necessary information is entered, click "Save".

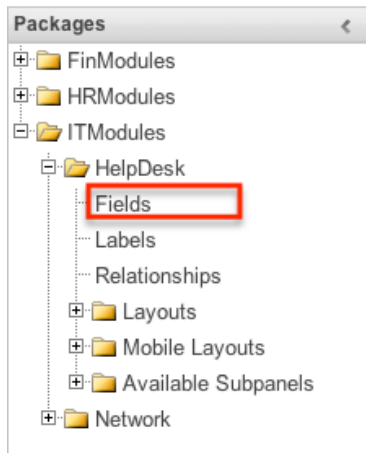


5. Once a field is created it must be placed on the record view layout in order for users to enter data into that field. For more information on editing layouts, please refer to the [Editing Layouts](#) section of this documentation.

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. Sorting the fields by the column header will help in locating the field faster.
 - Note: Fields created via Module Builder will display an asterisk (*) in front of their name.

| 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 |

3. Update the necessary [Field options](#) and click "Save" once complete.

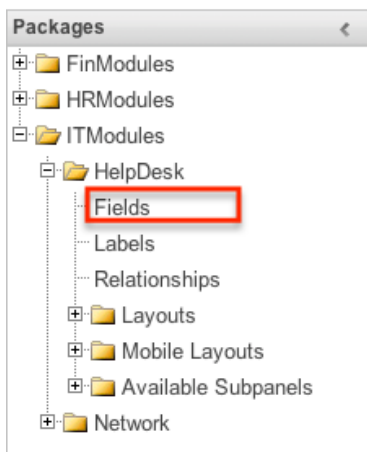
Edit Fields Edit Field ×
 Save Cancel Clone

Data Type: TextArea
 Field Name: description
 Display Label: Description:
 System Label: LBL_DESCRIPTION
 Help Text: Enter in a detailed Des
 Comment Text: Case details.
 Rows: 6
 Columns: 80

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. Sorting the fields by the column header will help in locating the field faster.
 - Fields created via Module Builder will display an asterisk in front of their name.
 - Note: Fields added via the module type template cannot be deleted.

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 |

3. Select "Delete" to remove the field.

Edit Fields Edit Field x

Save Cancel Delete Clone

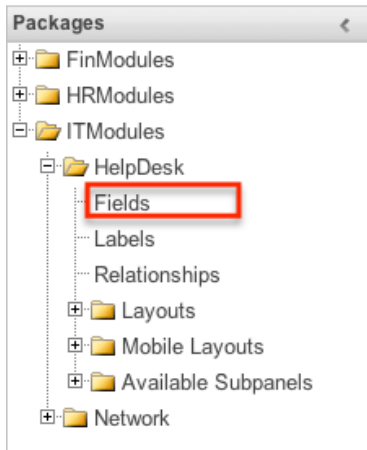
Data Type: DropDown
 Field Name: support_level_c
 Display Label: Support Level
 System Label: LBL_SUPPORT_LEVEL
 Help Text: The current support le
 Comment Text:
 Drop Down List: support_level_list
 Edit Add

4. A pop-up message will display asking for confirmation. Click "Ok" to proceed.
- o 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.
- o Note: When deleting fields in a module and re-deploying 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. Sorting the fields by the column header will help in locating the field faster.
 - Note: Fields created via Module Builder will display an asterisk (*) in front of their names.

| 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 |

3. Select "Clone" to duplicate the field.
 - Note: Some non-standard stock fields (e.g. Name) do not have the ability to 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

4. Enter appropriate values for the [Field options](#).
5. Once the necessary information is entered, click "Save".

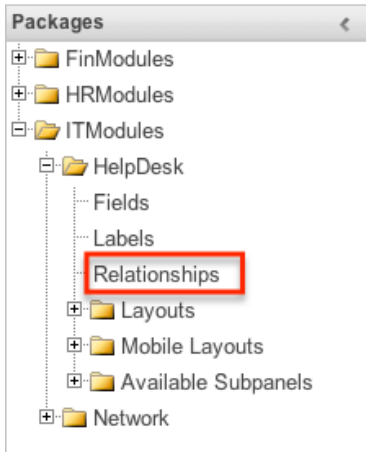
Edit Fields Edit Field x
Save Cancel

Data Type: DropDown
 Field Name: secondary_support
 Display Label: Secondary Support
 System Label: LBL_SECONDARY_SUPP
 Help Text: The current support le
 Comment Text:
 Drop Down List: support_level_list
 Edit Add
 Default Value: Standard
 Mass Update:
 Dependent: -None-
 Required Field:

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.



Note: Relationships created through Module Builder cannot be deleted in Studio after being deployed. Due to this, it is recommended that relationships be created in Studio after deploying the module instead of via Module Builder. As best practice, never re-deploy the module from Module Builder as it will remove all customizations made to your module via Studio, code customizations, etc.

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 record view where changing the relationship from either module will also change the value in the other module.
From the primary Accounts module:

Ac Avery Software Co ★ Follow

Website
<http://www.avery.com>

Member of

Assigned to
 Max Jensen

Contacts
[Donny Milliron](#)

From the related Contacts module:

Co Donny Milliron ★ Follow

Title
 VP Sales

Department

Account Name
[Avery Software Co](#)


Note: You can create a one way relationship between modules using relate fields. For more information regarding relate fields, please refer to the [Field Types](#) section of this documentation.

- 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 record 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 Accounts module:

| Co | Contacts |
|----------------------------------|-----------------------------------|
| Name | Account Name |
| ★ Herb Glancy | NW Bridge Con... |
| ★ Donny Milliron | Avery Software... |

From the related Contacts module:


Donny Milliron
★ Follow


Title
VP Sales

Department

Account Name
Avery Software Co


Note: A one-to-many relationship is the same as a many-to-one relationship except the Primary and Related modules are reversed. Adding a custom one-to-many relationship to "Activities" will add custom relationships to calls, meetings, notes, tasks, and emails. This will also automatically add these subpanels to the record view.

- 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 record view will display a subpanel for the opposite module. From the primary Accounts module:


Contacts

| | Name | Account Name |
|---|--------------------------------|-----------------------------------|
| ★ | Herb Glancy | NW Bridge Con... |
| ★ | Donny Milliron | Avery Software... |

From the related Contacts module:


Accounts

| | Name | Phone |
|---|--|----------------|
| ★ | Avery Software Co | (320) 013-8679 |
| ★ | NW Bridge Construction | (265) 634-6785 |

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.

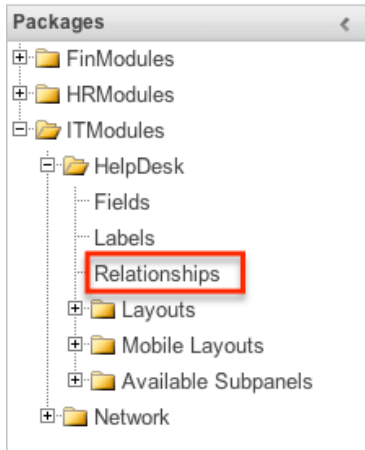
You can also create a relationship between a module and itself. In this case, the relationship becomes a parent-child relationship. For example, you can create a relationship from Accounts to Accounts in order to create sub-accounts within the

primary account.

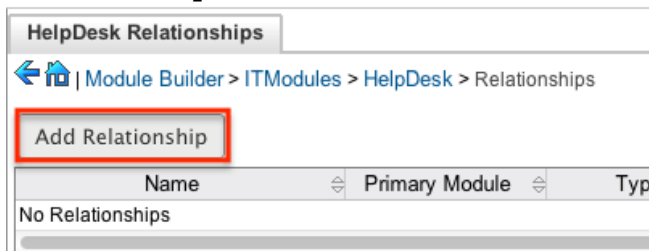
Creating Relationships

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".

HelpDesk Relationships Edit Relationship x

Save Cancel

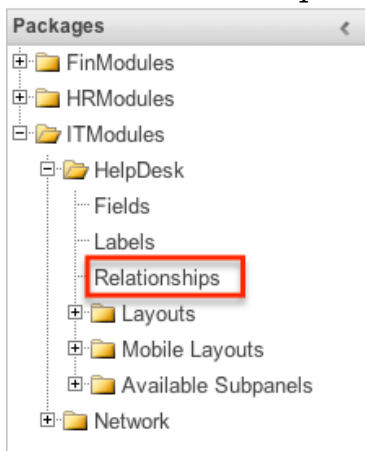
| Primary Module | | Type | Related Module | |
|--------------------------|-----------|--------------|-------------------------|----------|
| Module: | Help Desk | Many to Many | Module: | Accounts |
| Label: | Help Desk | | Label: | Accounts |
| Subpanel from Help Desk: | default | | Subpanel from Accounts: | default |

- 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:

- Expand out the tree under the desired module in the Packages 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.

HelpDesk Relationships

[Module Builder](#) > [ITModules](#) > [HelpDesk](#) > Relationships

Add Relationship

| 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 |

- The only editable field on a relationship is the Label field for naming the Primary or Related module subpanels. Please note that 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".

HelpDesk Relationships Edit Relationship X

Save Cancel Delete

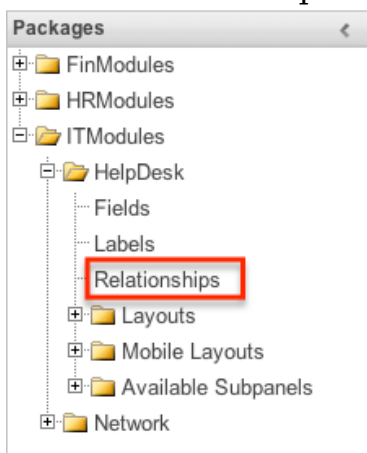
Name: itmp_helpdesk_hr_people

| Primary Module | Type | Related Module |
|-------------------|-------------|-------------------------------|
| Module: Help Desk | One to Many | Module: Person |
| | | Label: Employee |
| | | Subpanel from Person: default |

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. Select a relationship to delete in the main panel. Click the column headers to sort the grid by different columns to assist in locating the relationship.

HelpDesk Relationships

Module Builder > ITModules > HelpDesk > Relationships

Add Relationship

| 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. Click "Delete" to remove the relationship.

HelpDesk Relationships Edit Relationship x

Save Cancel **Delete**

Name: itmp_helpdesk_hr_people

| 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.

Alert

Are you sure you wish to delete this relationship?
 Note: This operation may not complete for several minutes.

Do Not Remove Tables

Yes No

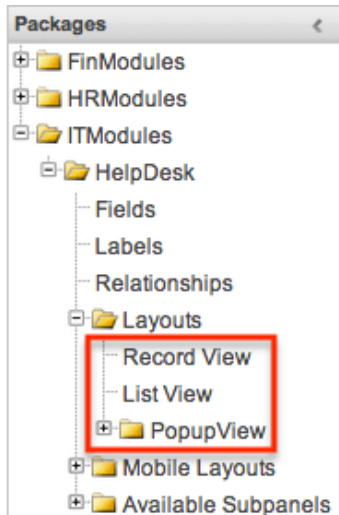
Note: If you wish to retain the data and table structure that currently exists for the relationship, select the "Do Not Remove Tables" option. Leaving the "Do Not Remove Tables" unchecked will delete the relationship data and remove the tables for the relationship from the database when the package is installed.

Before deleting a relationship please verify and resolve the following issues:

- o Relationship must be removed from any report filters or displays.
- o Relationship must be removed from any workflows that filters or displays fields from the relationship.
- o 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 below.

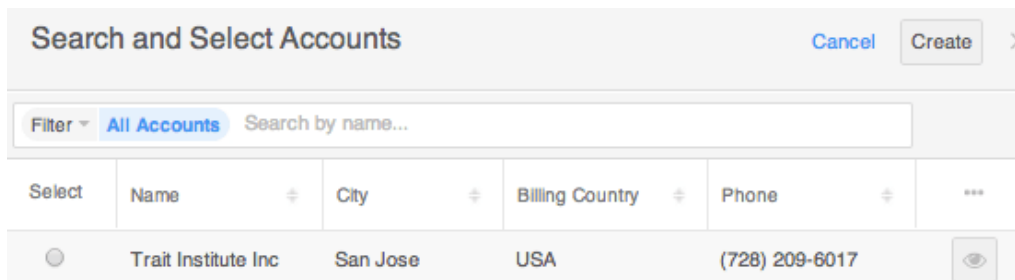


Layout Types

Sugar comes with different types of layouts to represent different sections of Sugar. Please note that not all layouts are available in every module. The following layouts are available to configure in Module Builder:

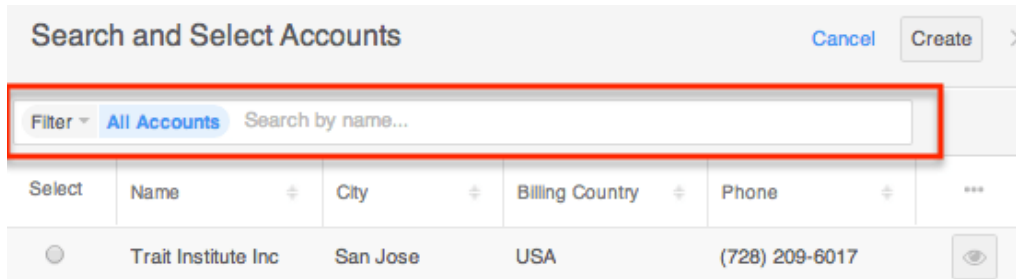
- **Record View** : Record view layout is used to modify, create, or view a record within the specified module. Please note that this layout is specific to modules using the Sidecar user interface.
- **List View** : List view layout is used to view multiple records within the specified module and displays all results meeting the current search criteria.
- **Popup List View** : Popup list view layout is used to view multiple records via a popup window used to locate and select records in the specified module.

For Sidecar modules:



- **Popup Search** : Popup search layout is used to allow users to perform a search via the the popup window used to select records in the specified module.

For Sidecar modules:



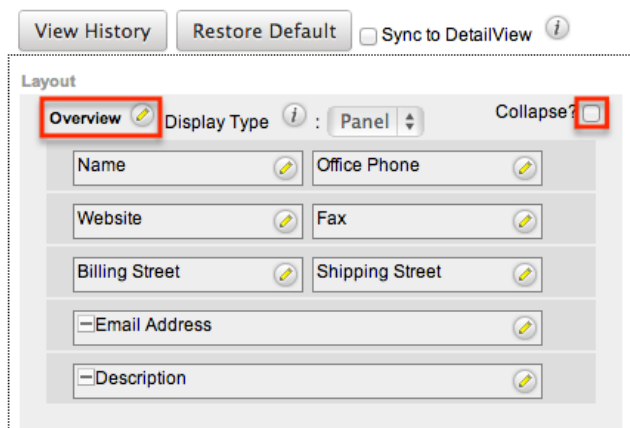
Layout Options

Administrators have the ability to configure the various layouts (e.g. record view, list view, etc.) available via Module Builder. Please note that the layouts can be configured via Admin > Studio as well once the module has been deployed. For more information on configuring layouts, please refer to the [Studio](#) documentation.

The following are some of the options available to administrators when configuring layouts via 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.



Note: The default panel name cannot be modified in Module Builder.

- **View History** : Sugar preserves a history of the changes made to each layout. Click "View History" and the History dialog box will display the timestamp of when changes occurred and allow you to preview the layout then restore if you wish. For more information on viewing the history of layouts, please refer to the [Viewing Layout History](#) section of this documentation.
- **Restore Defaults** : Sugar provides the option to restore a layout to it's original

default configuration. For more information on how to restore the default layout, please refer to the [Restoring Layout Defaults](#) section of this documentation.

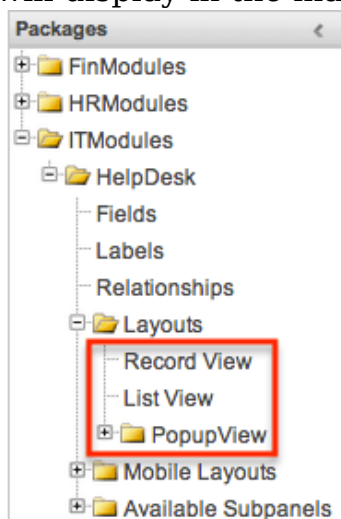
Editing Layouts

You can add, remove, hide, etc. the fields for the available layouts in the module by selecting the specific layout under the Packages panel to edit. Please note that the List View and Popup View layouts have columns where you can designate fields users can and cannot see. Once a module is deployed, record views may be configured in Studio to display differently [based on the viewing user's role](#).

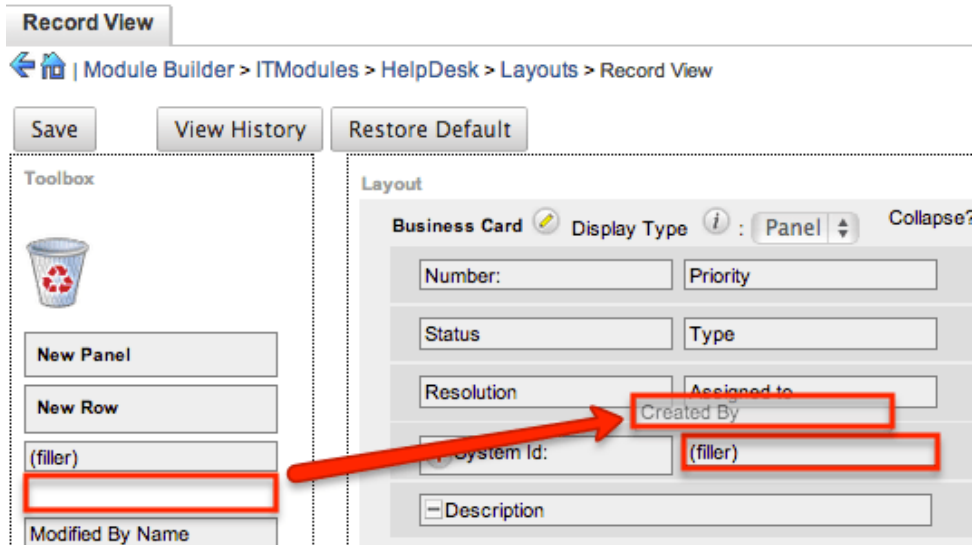
Editing Record View Layout

The following steps cover editing the Record View layout as an example:

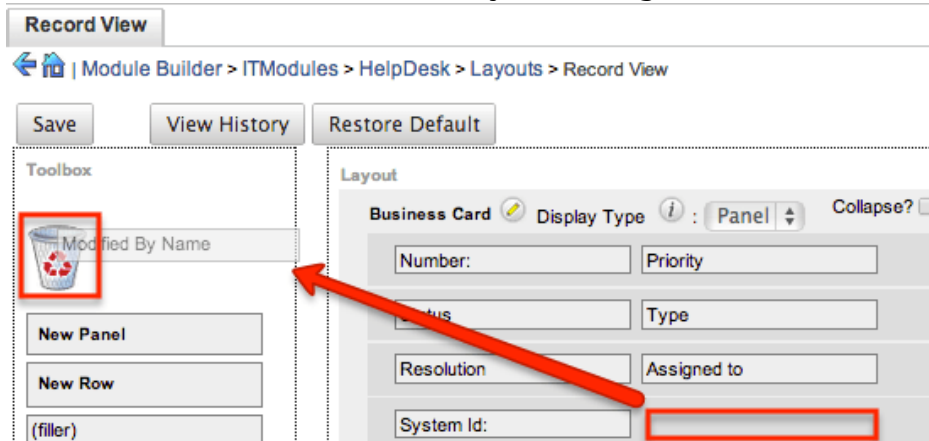
1. Expand "Layouts" from the Packages panel under the desired module and select the layout (e.g. Record View) you wish to edit. The Record View layout will display in the main panel to the right.



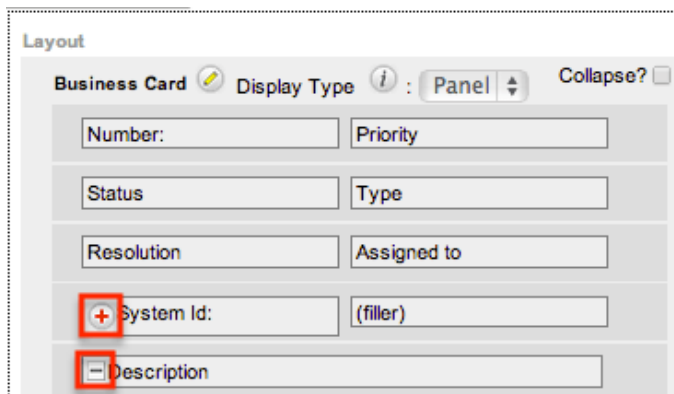
2. To add a field to the Record View layout, drag the field from the list of fields in the Toolbox to a "(filler)" location on the layout per your preference.
 - You can also drag a field to a location on the layout that already has a field in place. The newly added field and the existing field on the layout will swap places.



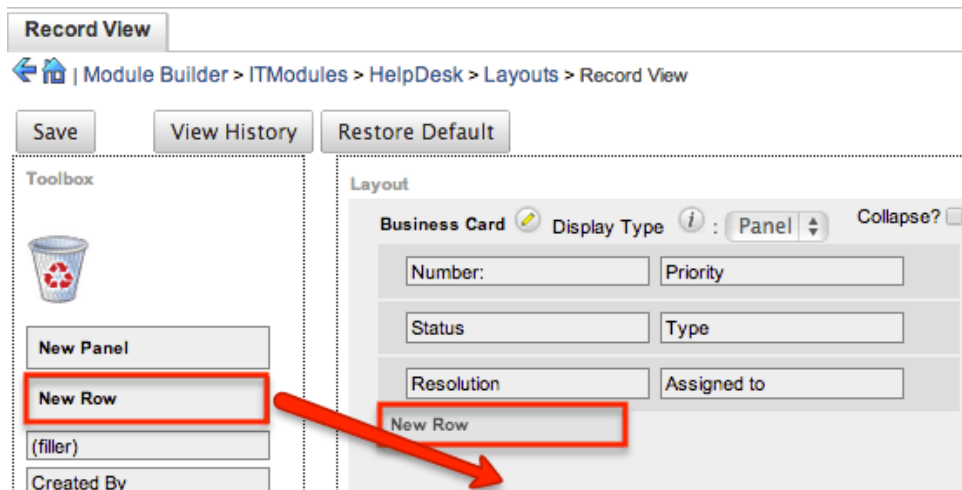
- To remove a field from the layout, drag and drop the field from the layout to the trash bin in the toolbox to remove the field from the layout. You may remove an entire row in the layout using the same method.



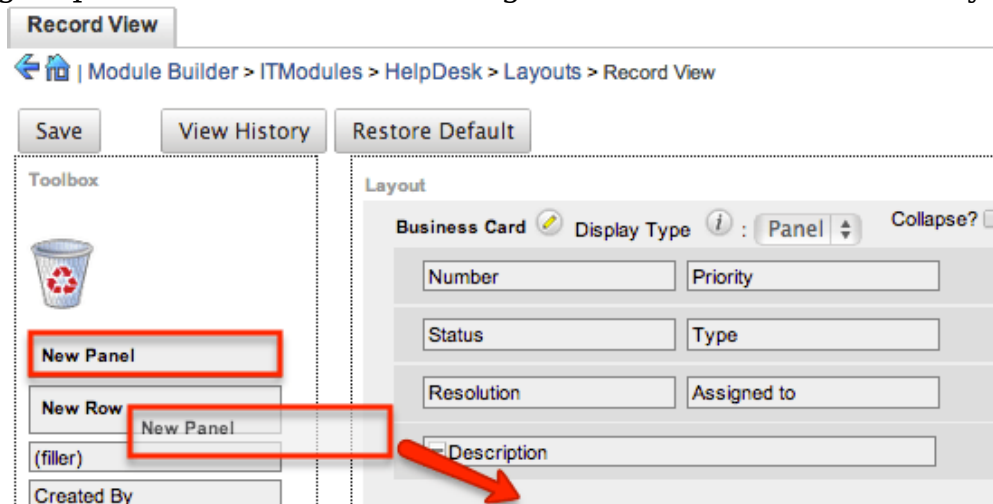
- To expand or minimize the field column in the layout, click the Plus icon (+) to stretch the field over two columns or click the Minus icon (-) to fit the field into one column.
 - Note: The layout will display a "(filler)" if there is no field in that location.



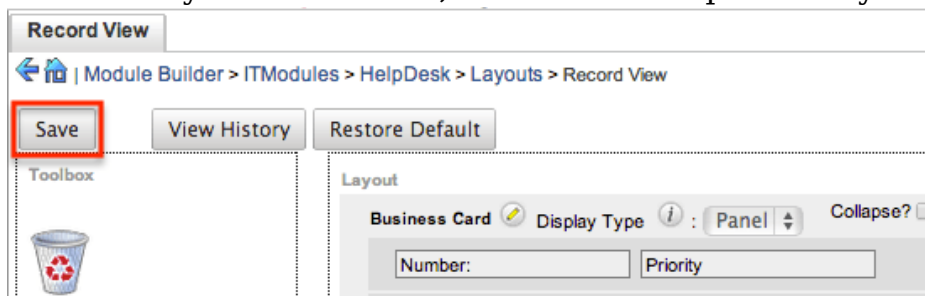
- To add a new row, drag the "New Row" item in the Toolbox to the layout to allow additional fields or blank spaces to be added.



6. To add a new panel, drag the "New Panel" item in the Toolbox to the layout to group different sets of fields together in the Record View layout.



7. Once the layout is finalized, click "Save" to preserve your changes.



Note: It is recommended that dependent fields be placed below and/or to the right of the independent field in order to preserve the correct display of fields on the layout.

Editing List View Layout

Unlike the Record View layout, the List View layout has columns where you can designate fields users can and cannot see. When configuring the List View layout,





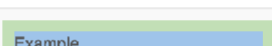
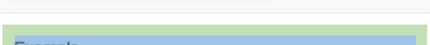
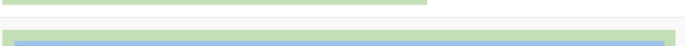
you will see three columns (Default, Available, Hidden) where fields can be dragged and dropped accordingly.

Please note that editing the List View layout affects the list of available fields for the module's list view dashlet as well since both are controlled by the same layout (List View). Once the custom module is deployed, the configurations made to the list view layout in Module Builder will be reflected in the Columns fields of the corresponding module dashlet's [Configuration Options page](#) . After the custom module is deployed, all succeeding changes to the List View layout can be made via [Studio](#). Please keep in mind that the custom module dashlet will not automatically reflect the Studio changes and users must edit the dashlet in order to view the changes, add new fields to the layout, etc.

Administrators can easily set the column widths for specific fields when configuring the List View layout. You can choose from a pre-defined list of width sizes (e.g. small, medium, large, etc.) that are available out-of-the-box with Sugar or enter a custom width value in pixels (e.g. 200) for Sidecar modules.

Note: When defining the column width for currency fields (e.g. Likely, Best, etc.), only "large" and above will apply because there is a minimum width requirement in Sugar for this field type. In addition, when defining a custom width for currency fields, the value must be 141px or wider.

The following table lists the available column width sizes in Sugar along with the corresponding width in pixels: **Table column widths**

| Name | Width | Example |
|---------|-------|--|
| xxsmall | 21px |  |
| xsmall | 42px |  |
| small | 68px |  |
| medium | 110px |  |
| large | 178px |  |
| xlarge | 288px |  |
| xxlarge | 466px |  |

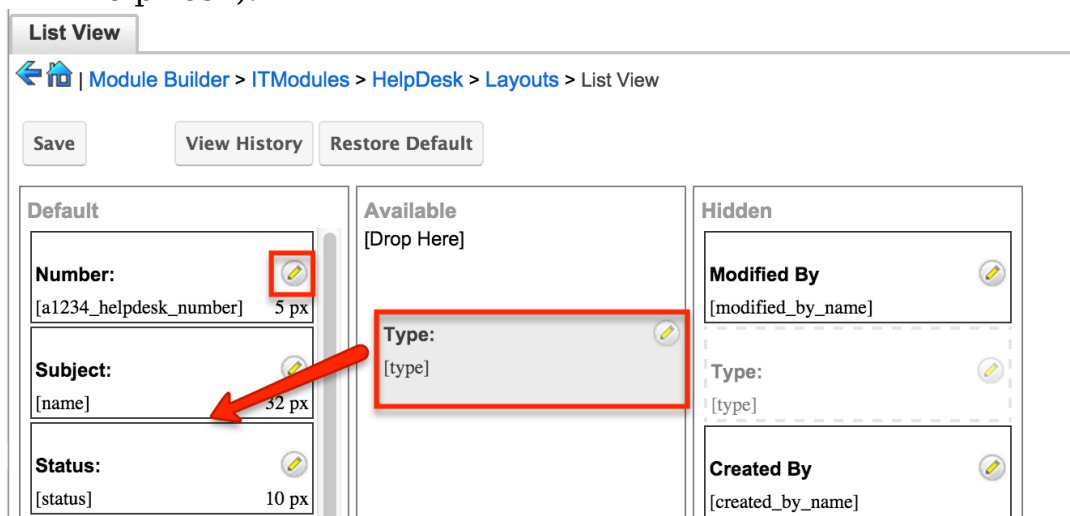
- Default : This column contains fields that are displayed in the layout.
- Available : Available fields are fields that will not show by default in the layout, but if the layout can be personalized, users can add these fields to their view of the layout. Not all list type layouts have an available fields

section.

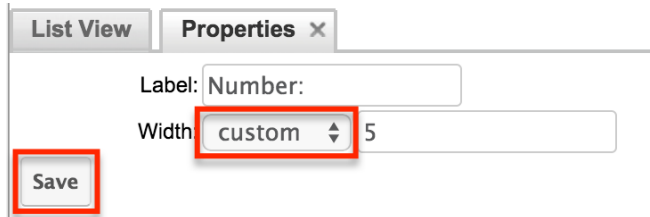
- **Hidden** : This column contains fields that will not be displayed in the layout.

The following steps cover editing the List View layout as an example:

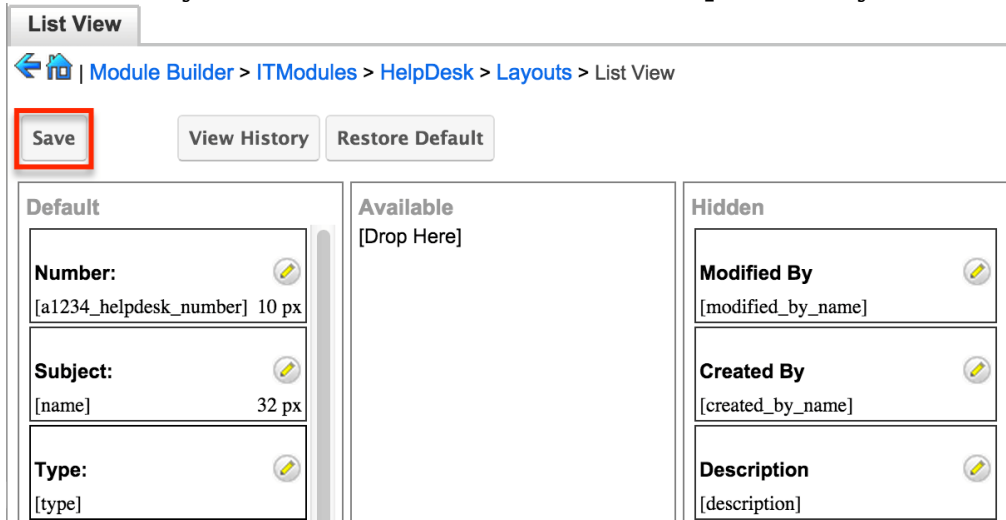
1. Expand "Layouts" from the Packages panel under the desired module and select "List View".
2. To add a field to the List View layout, drag and drop the fields from the Hidden column to the Default column.
 - Note: The fields in the Default column will be available to add as display columns in the corresponding custom module dashlet (e.g. My HelpDesk).



3. To remove a field from the layout, drag and drop the field from the Default column to the Hidden column.
4. To change the left-to-right order of the fields displayed on the list view, drag and drop fields up or down within the Default list.
 - Note: The order of fields designated for the List View layout also affects the order for the list of available fields in the corresponding custom module dashlet (e.g. My HelpDesk).
5. To modify the label of the field, as well as the width of the field, click the Pencil icon next to each field.
6. Enter the new label or select the width (e.g. small, medium, large, etc.) then click "Save". Please note the modified label will display in all List View layouts for this module.
 - Note: Administrators can choose from a pre-defined list of width sizes (e.g. default, small, medium, etc.). Please note that selecting the Default width will set the list view column to equal the Medium width size. Selecting "custom" from the list will allow you to enter a custom width value in the open box. The custom width value should be entered in pixels (e.g. 200) for the fields.

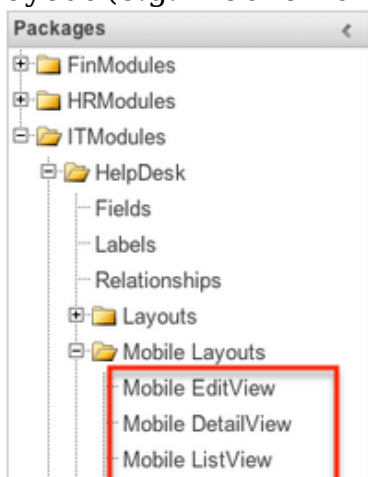


7. Once the layout is finalized, click "Save" to preserve your changes.



Mobile Layouts

Administrators can also configure the mobile layouts for SugarCRM Mobile by expanding "Mobile Layouts" for the desired module from the Packages panel. The list of available mobile layouts will display below and you can select the specific layout (e.g. Mobile EditView, Mobile DetailView, etc.) you wish to configure.



Mobile Layout Types

There are various mobile layouts in Sugar to represent the different areas of the SugarCRM mobile application. Please note that 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.

Mobile Layout Options

Administrators have the ability to configure the various layouts available via Module Builder. Please note that the mobile layouts can be configured via Admin > Studio as well once the module has been deployed. For more information on configuring layouts, please refer to the [Studio](#) documentation.

The following are some of the available options when configuring mobile layouts via Module Builder:

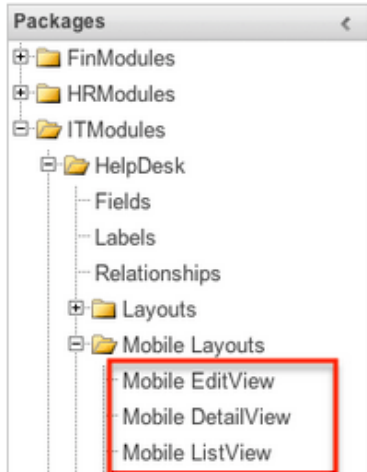
- **View History** : Sugar preserves a history of the changes made to each layout. Click "View History" and the History dialog box will display the timestamp of when changes occurred and allow you to preview the layout then restore if you wish. For more information on viewing the history of layouts, please refer to the [Viewing Layout History](#) section of this documentation.
- **Restore Defaults** : Sugar provides the option to restore a layout to its original default configuration. For more information on how to restore the default layout, please refer to the [Restoring Layout Defaults](#) section of this documentation.

Editing Mobile Layouts

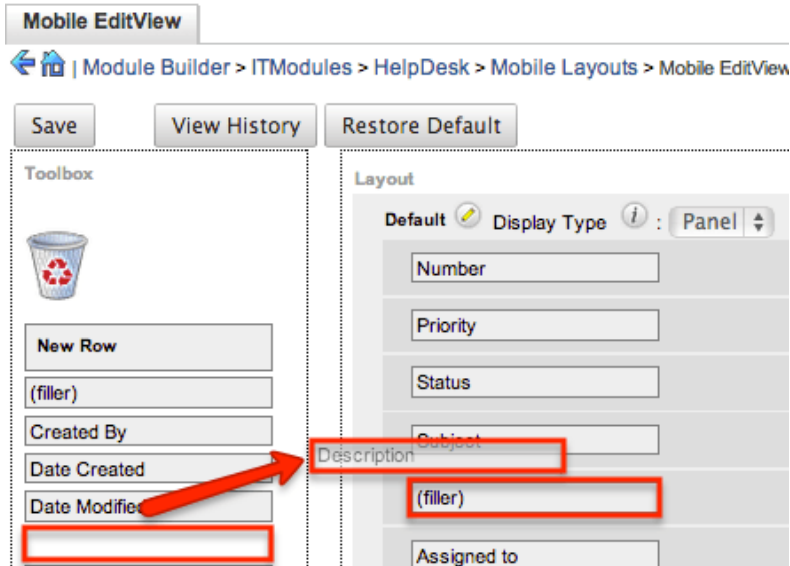
You can add, remove, hide, etc. the fields for the available layouts in "Mobile Layouts" by selecting the specific layout under the Packages panel to edit. Please note that the Mobile EditView and DetailView layouts are modified in similar fashions. The Mobile ListView layout has columns where you can designate fields users can and cannot see.

The following steps cover editing the Mobile EditView layout as an example:

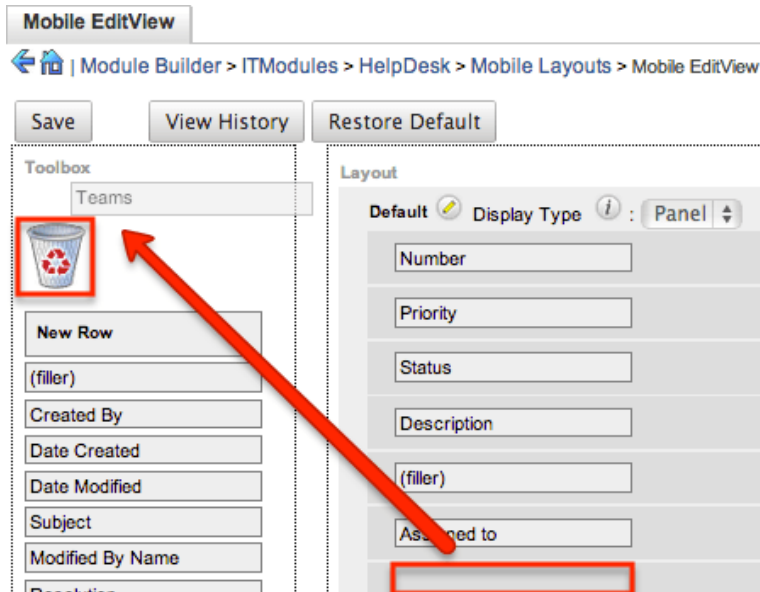
1. Expand "Mobile Layouts" from the Packages panel under the desired module and select "Mobile EditView". The selected layout will display in the main panel to the right.



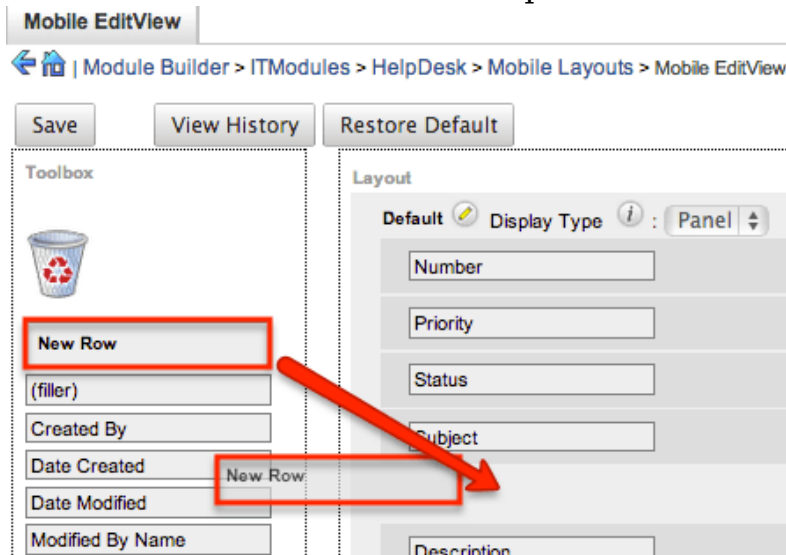
2. To add a field to the Mobile EditView layout, drag the field from the list of fields in the Toolbox to a "(filler)" location on the layout per your preference.
 - You can also drag a field to a location on the layout that already has a field in place. The newly added field and the existing field on the layout will swap places.



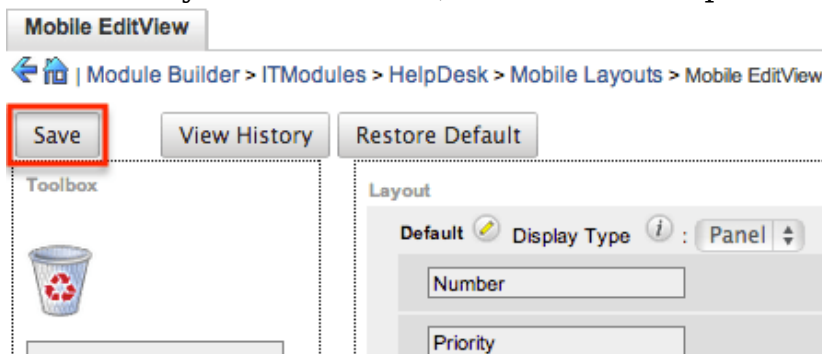
3. To remove a field from the layout, drag and drop the field from the layout to the trash bin in the Toolbox to remove the field from the layout. You may remove an entire row in the layout using the same method.



- To add a new row, drag the "New Row" item in the Toolbox to the layout to allow additional fields or blank spaces to be added.



- Once the layout is finalized, click "Save" to preserve your changes.

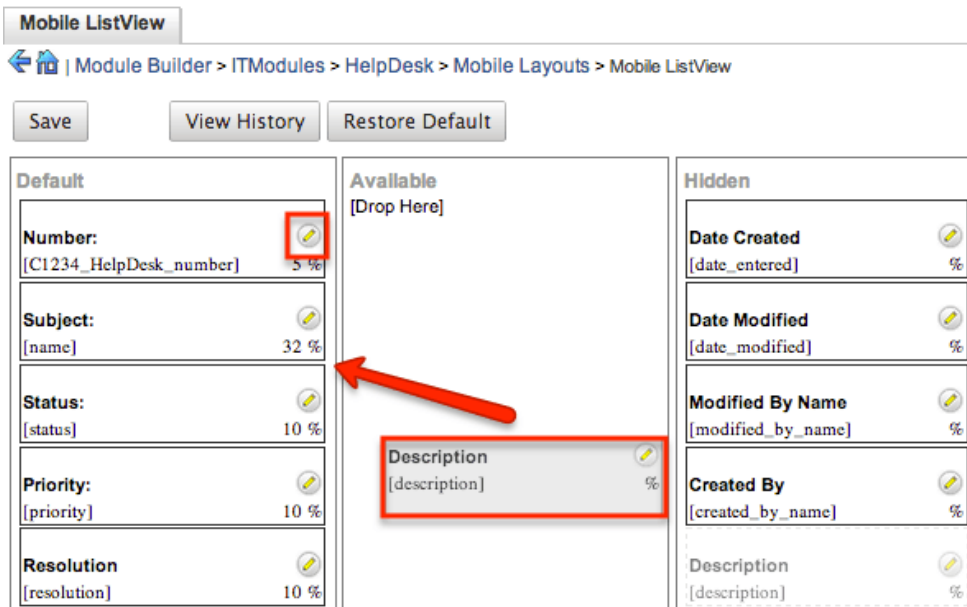


Unlike the Mobile EditView layout, the Mobile ListView layout has columns where you can designate fields users can and cannot see. When configuring the Mobile ListView layout, you will see three columns (Default, Available, Hidden) where fields can be dragged and dropped accordingly.

- **Default** : This column contains fields that are displayed on the list view.
- **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** : This column contains fields that will not be displayed on the list view.

The following steps cover editing the Mobile ListView layout as an example:

1. Expand "Layouts" from the Packages panel under the desired module and select "Mobile ListView".
2. To add a field to the Mobile ListView layout, drag and drop the fields from the Hidden column to the Default column.

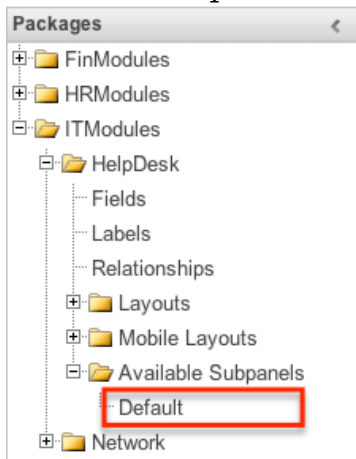


3. Click the Pencil icon to modify the label of the field as well as the width percentage the field will take up in the list view. Please note that the modified label will display in all List View layouts in SugarCRM Mobile.
4. Once the layout is finalized, click "Save" to preserve your changes.

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

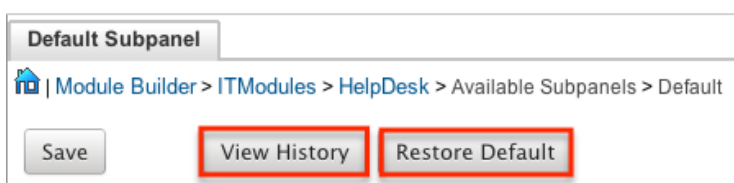
available subpanel for the selected module will appear to the right of the screen.



Subpanel Options

When configuring the Subpanel layout in Module Builder, there are some available options which allow you to view historical layout changes as well as restore the default layout. Please note that the subpanel layout can be configured via Admin > Studio as well once the module has been deployed. For more information on configuring layouts, please refer to the [Subpanels](#) section of the Studio documentation.

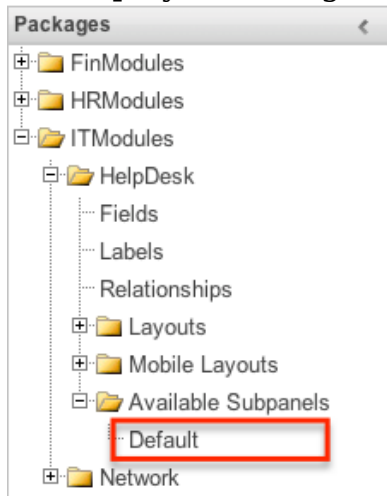
- **View History** : Sugar keeps a history of the changes made to each subpanel. These changes and when they occurred can be viewed and restored via "View History". For more information on viewing the history of subpanels, please refer to the [Viewing Layout History](#) section of this documentation.
- **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 of this documentation.



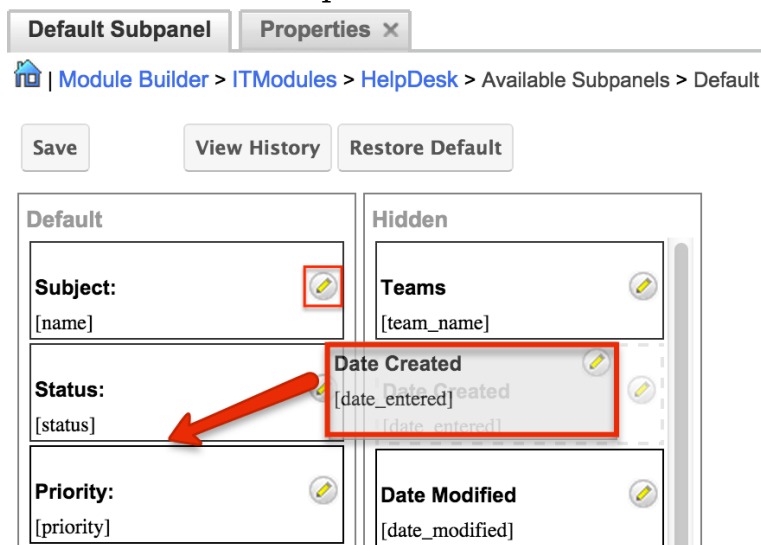
Editing Subpanel Layout

Use the following steps to modify a subpanel via Module Builder:

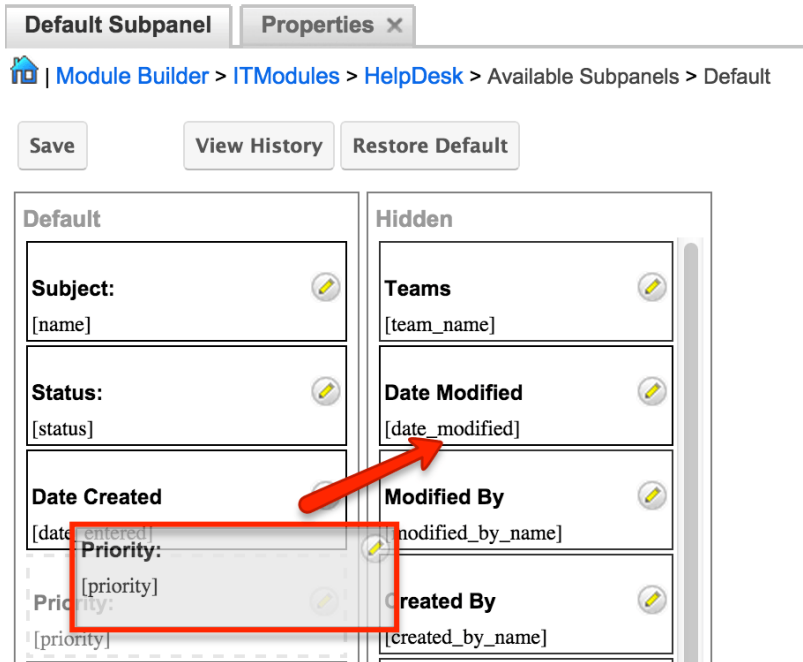
1. Expand "Available Subpanels" from the Packages panel under the desired module and select the subpanel you wish to edit. The selected subpanel layout will display to the right in the main panel.



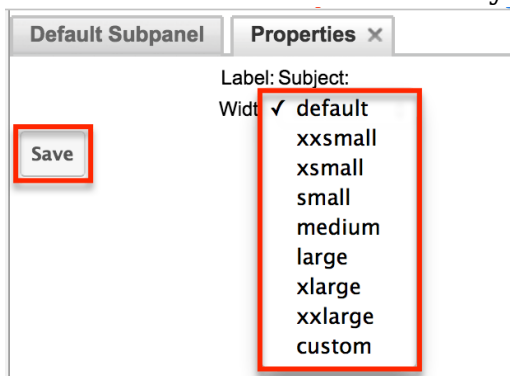
2. To add a field to the Subpanel layout, drag and drop the fields from the Hidden column to the Default column.
 - o You can drag the field up and down the list to change the position of the field in the subpanel.



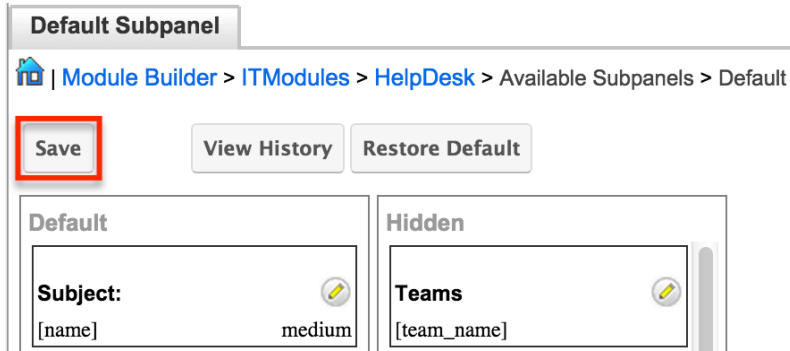
3. To remove a field, drag and drop the fields from the Default column to the Hidden column.



4. Click the Pencil icon to change the column width of the field in the subpanel.
 - Note: Administrators can choose from a pre-defined list of width sizes (e.g. default, small, medium, etc.). Please note that selecting the Default width will set the list view column to equal the Medium width size. Selecting "custom" from the list will allow you to enter a custom width value in the open box. The custom width value should be entered in pixels (e.g. 200) for the fields.
 - When defining the column width for currency fields (e.g. Likely, Best, etc.), only "large" and above applies because there is a minimum width requirement in Sugar for this field type. In addition, when defining a custom width for currency fields, the value must be 141px or wider.



5. Once the subpanel layout is finalized, click "Save" to preserve your changes.

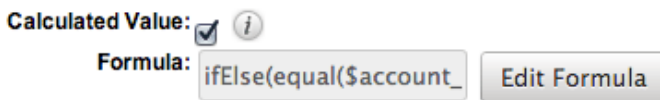


Using Sugar Logic

Sugar Logic allows 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.

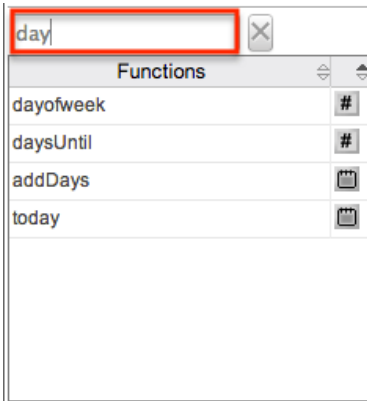
Note: When creating a calculated formula for a Currency field, the currency symbol should not be used for a value (e.g. \$100) in the formula. The formula should only define the numeric value (e.g. 100), as including the currency symbol will result in improper calculated values.

For more information regarding the types of fields you can use Sugar Logic in, please refer to the [Field Options](#) section of this documentation. You can access the formula builder when editing or creating the field by checking "Calculated Value" then clicking "Edit Formula".

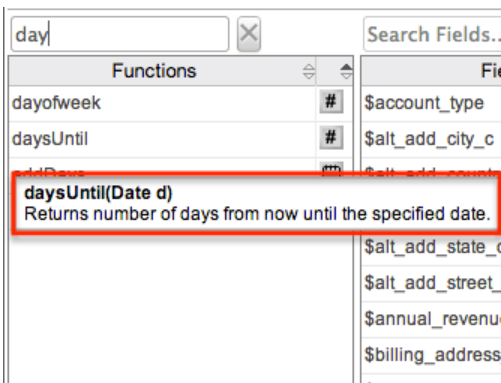


Functions

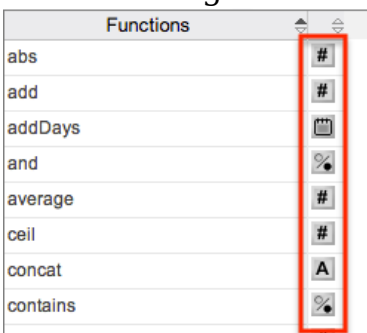
Functions are listed on the bottom left hand corner of the formula builder and provide a variety of calculations, logic checks, and formatting options. To locate the function you need, simply scroll through the list or enter the search criteria to narrow the list.



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 the 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 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 | String \$param1 | List |

| | | | |
|---------------|--|---|----------|
| | dropdown named \$param1. This list must be defined in the Dropdown editor. | | |
| greaterThan | Returns true if \$param1 is greater than \$param2. | Number \$param1, Number \$param2 | Boolean |
| hoursUntil | Returns the number of hours from now until \$param1. | Date \$param1 | Number |
| 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 | Number \$value, Number \$min, Number \$max | Boolean |

| | | | |
|----------------|--|------------------------------------|---------|
| | \$min and less than or equal to \$max. | | |
| 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 |
| maxRelatedDate | Returns the highest value of \$field in records related to \$module. | Relate \$module, String \$field | Date |
| 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, 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 | Boolean \$param1, | Boolean |

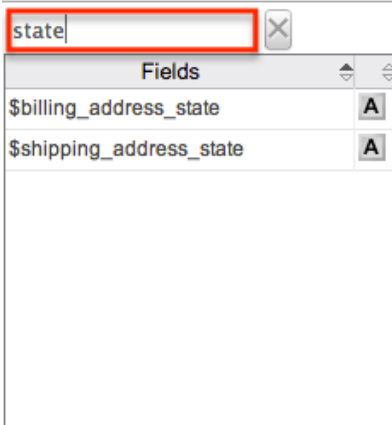
| | | | |
|------------|---|---|----------|
| | given parameters are true. | ... | |
| pow | Returns the \$value raised to the power of \$exponent. | Number \$value, Number \$exponent | Number |
| related | Returns the value of \$field in the related \$module. | Relate \$module, String \$field | Variable |
| 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 |
| timestamp | Returns the passed | | Date |

| | | | |
|----------------|---|------------------------------------|----------|
| | in datetime string as a unix timestamp. | | |
| 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, simply scroll through the list or enter a search criteria to narrow the list.

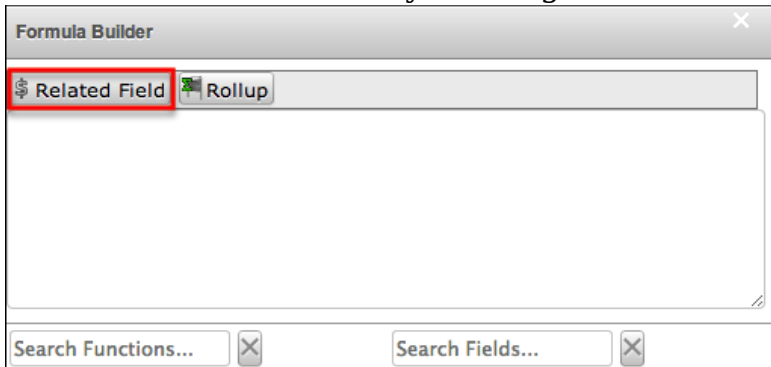
To add a field to the formula, simply click on the field to be added. The variable name for the field will be placed at the end of the formula. You can also type the variable names manually in the formula.



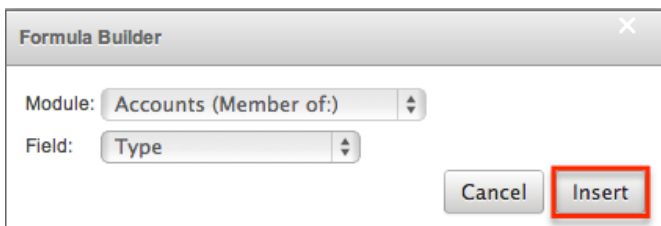
Related Field

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".



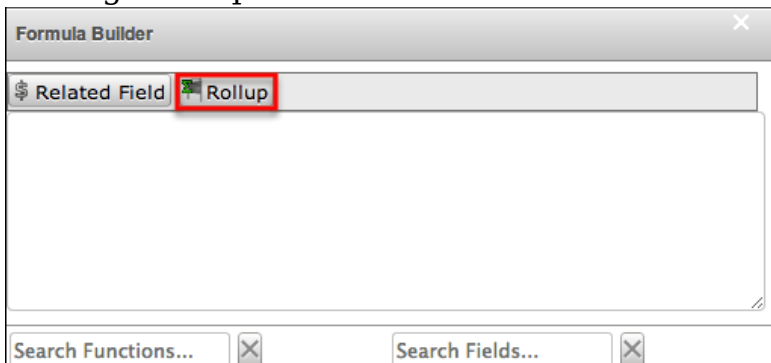
This will open a dialog box which will assist in building the syntax to use the related function. Select a module and a field within that module to pull the related field from and click "Insert".



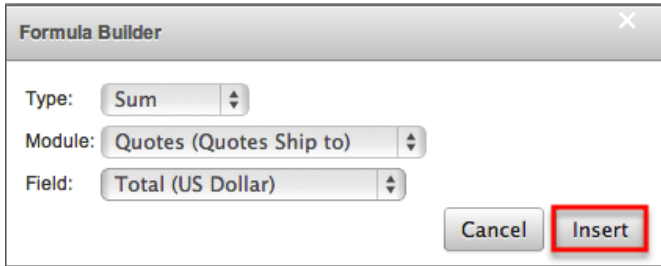
The resulting syntax for the selected options will be added to the formula. Note: If a record has multiple related records to a module, the related function will pull the field from one of the related records. It is not recommended to rely on the related function to pull the same related records for 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".



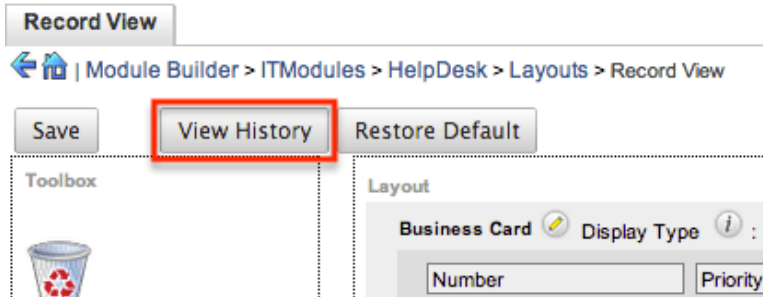
This will open a dialog box which will assist in building the syntax to use the rollup function. Select the type of rollup function (Sum, Average, Minimum, or Maximum) to perform on the module field. To perform a count of related records, please refer to the count function listed in the [Functions](#) section. Select a module and a field within that module to perform the rollup function on then click "Insert".



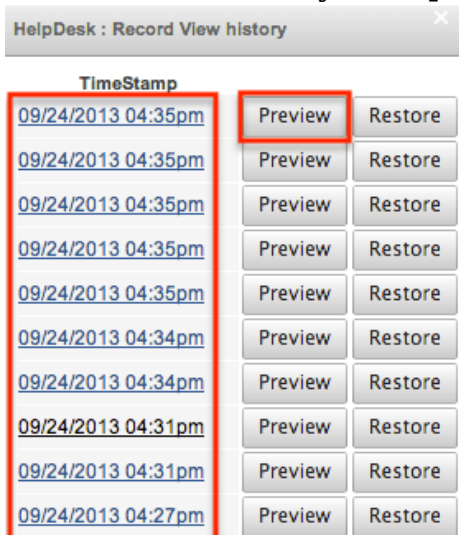
The resulting syntax for the selected options will be added to the formula.
 Note: Rollup functions can only aggregate number type fields.

Viewing Layout History

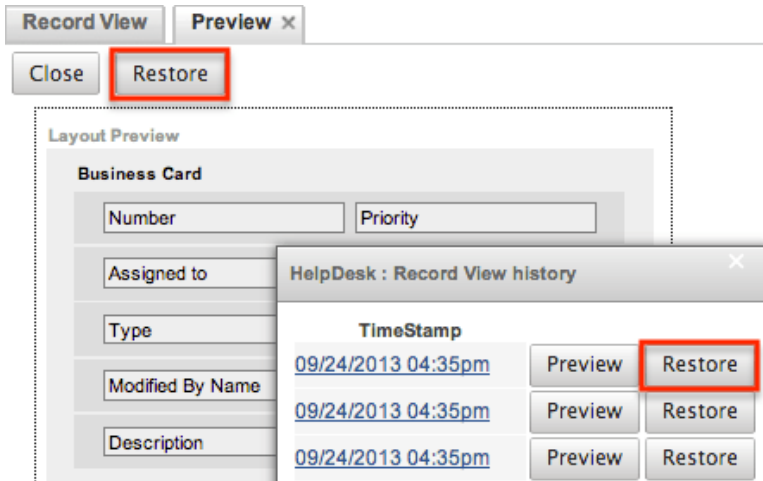
Layouts, subpanels, and mobile layouts keep a history of the last ten changes made to each layout. To view the history for any of these layouts, simply click "View History" on the layout editor view in Module Builder.



The History dialog box will open up displaying the timestamps of when changes occurred and allow you to preview the layout by clicking the Preview button.

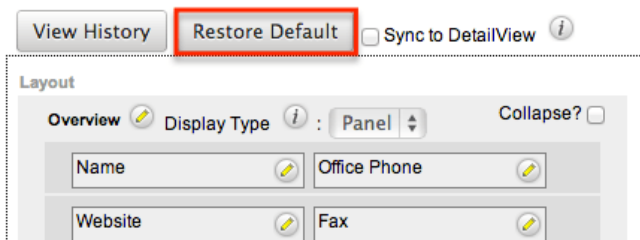


The preview will show the details of the layout as of the specific time it was saved. To restore the layout to the particular version you are viewing, simply click the Restore button from under the Preview tab or in the History dialog box. The restored layout will load into the layout editor allowing you to make any additional changes as necessary. 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.



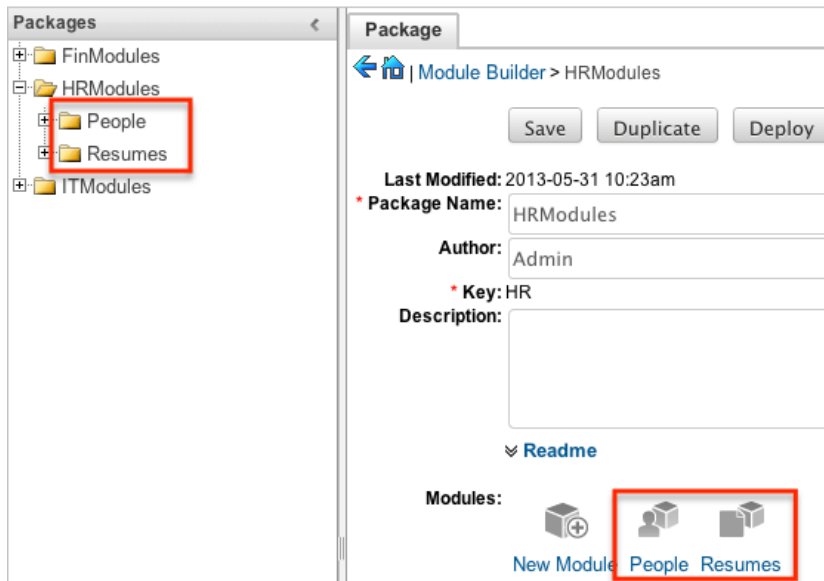
The default layout will load into the editor allowing you to make changes as necessary. Click "Save" to preserve your changes.

Deleting Modules

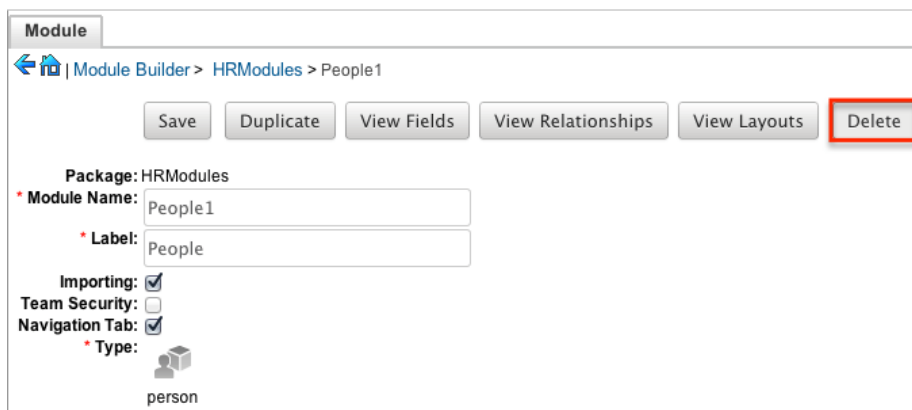
If a module is invalid or should no longer appear in a package, it may be deleted from Module Builder. Please note that deleting a module from a package will not remove the module from any instances where the package was deployed. For more information on how to uninstall a deployed package from an instance, please refer to the [Module Loader](#) documentation.

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 main panel.



2. Click "Delete" to remove the module.



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

Last Modified: 11/23/2016 02:24am

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.

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 | Uninstall | 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.

Module

- **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 | Install | 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 |

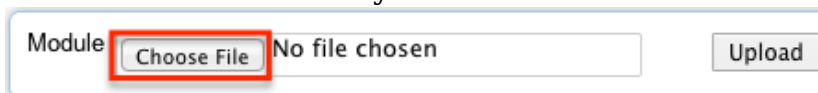
The Uploaded Packages panel consists of the following fields:

| 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 uninstalleable 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

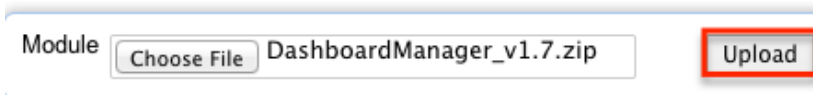
After receiving the file that you would like to install, you must first upload it to your Sugar instance. To upload a file, follow the following steps:

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



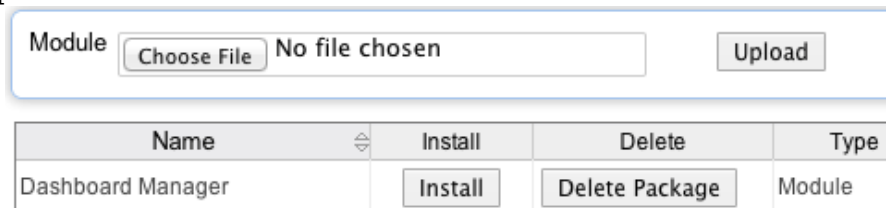
The screenshot shows a form with a label "Module" on the left. To its right is a text input field containing "No file chosen". A "Choose File" button is positioned between the label and the input field, and it is highlighted with a red rectangular box. To the right of the input field is an "Upload" button.

3. Select the file from your local computer
4. After you select your file, click the "Upload" button to complete the process



The screenshot shows the same form as above, but the text input field now contains "DashboardManager_v1.7.zip". The "Choose File" button is no longer highlighted. The "Upload" button is now highlighted with a red rectangular box.

5. After it has been uploaded, the package will show in the Uploaded Packages panel



The screenshot shows a table with the following structure:

| Name | Install | Delete | Type |
|-------------------|---------|----------------|--------|
| Dashboard Manager | Install | Delete Package | Module |

The "Install" button in the table row is highlighted with a red rectangular box.

Installing Packages

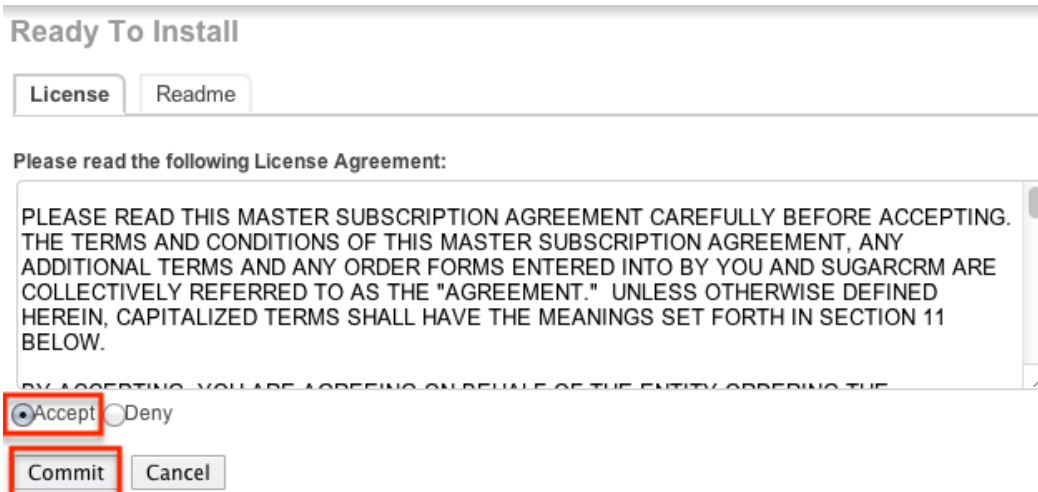
After uploading a package to Module Loader, it must be installed for the package's contents to take effect on your instance. To install a package, follow the following steps:

1. Follow the steps to [upload your package](#) to Module Loader.
2. Click the "Install" button on the Uploaded Packages panel.



This is a smaller version of the table shown in the previous screenshot, with the "Install" button in the "Dashboard Manager" row highlighted with a red rectangular box.

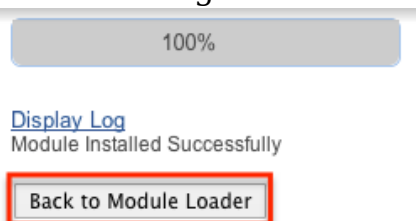
3. You will be brought to the installation screen to confirm that the packages should be installed, and to read and accept any license or readme documentation as needed. Click "Commit" when ready to run the installation.



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.

Note: To sustain the stability, security, and integrity of the Sugar On-Demand environment, all installed packages are scanned to check for code not conforming to environmental agreements. Any package that fails this scanner will not be installed and the installer will produce a reason for the failed installation. If this happens, please contact the developer of your package for more information.

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.



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.

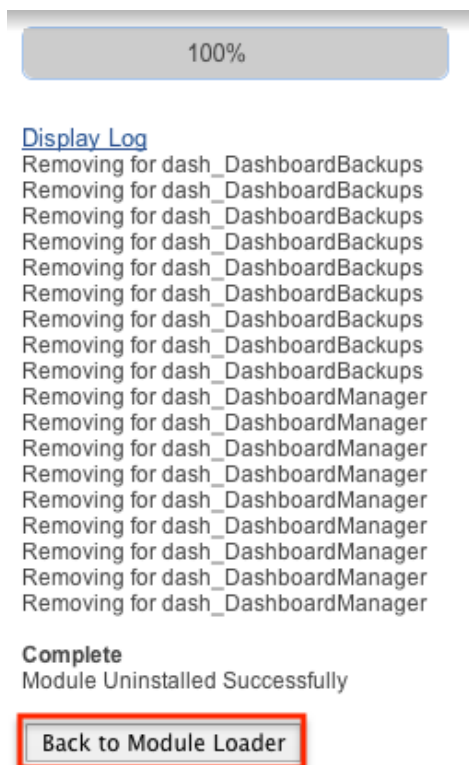
Ready To Uninstall

Commit Cancel

Remove Tables Do Not Remove Tables

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 | Install | Delete Package | Module |

Installing Role-Based Customizations

Administrators have the ability to create role-based custom dropdown lists and role-based custom record views via Studio and Dropdown Editor. These role-based customizations are included when exporting customizations via Studio. When the exported package is then installed on a destination instance, administrators will be given the opportunity to map the package's customized roles to the destination instance's roles. Sugar will attempt to select a matching role from amongst the destination instance's roles. The role mapping can be manually altered by selecting a different role from the dropdown menus. If you wish to not install a role's customizations, choose "Do not map this role" in the dropdown. Once the mappings are correctly set, click "Commit" to proceed with installing the package.

Map ACL Roles

| Package Roles | Instance Roles |
|--|--|
| Sales Administrator ID: 40df175a-e723-804a-8af7-556cde10469e | Sales Administrator (matches by Name) |
| Customer Support Administrator ID: 4ef9edf3-9145-73d1-5682-556cde2fd660 | Customer Support Administrator (matches by Name) |
| Marketing Administrator ID: 47fcf6db-c11e-8032-2174-556cdef11e45 | -- Do not map this role -- |

Importing Role-Based Custom Record Views

If the package contains role-based custom record views, the mapped roles in the destination instance will be updated to match the package's custom record views. Any prior customizations made record view for the destination instance's role will be overwritten. Regardless of any prior customizations made on the destination instance, all mapped roles will be updated to completely match the imported role-based record views. For more information about creating role-based custom record views, please refer to the [Studio](#) documentation.

Importing Role-Based Custom Dropdown Lists

When a package contains non-stock dropdown values for the default role, the destination instance's default role-list will be completely overwritten by the package.

If the package, the destination instance, or both include role-based custom dropdown lists, Sugar will take the destination instance's original customized role-lists into consideration when deciding on the resulting customized role-lists. The following table demonstrates how default custom dropdown lists and role-based custom dropdown lists will be affected:

- When a cell indicates "Undefined", it means that the role does not have a customized role-list, and it will inherit the custom default list.
- When a cell indicates "Any", it means that the role's role-list is customized, but any of the possible combination of values will produce the same result.
- When a cell indicates "Empty", it means that the role's role-list is customized to have no enabled values.
- In every situation, the resulting default role-list will be overwritten to exactly match the package's default role-list.

| Situation and Outcome | Destination Default Role-List | Destination Custom Role-List | Package Default Role-List | Package Custom Role-List | Resulting Default Role-List | Resulting Custom Role-List |
|---|-------------------------------|------------------------------|---------------------------|--------------------------|-----------------------------|----------------------------|
| <p>The destination and package match.</p> <p>The destination remains unchanged.</p> | A,B,C | B,C | A,B,C | B,C | A,B,C | B,C |
| <p>This role is not customized in the destination or package.</p> <p>This role will not be customized and will inherit the default role-list.</p> | A,B,C | Undefined | X,Y,Z | Undefined | X,Y,Z | Undefined |
| <p>This role is customized in both the destination and package.</p> <p>This role's custom role-list is updated to match the package's.</p> | A,B,C | Any | A,B,C | A,C | A,B,C | A,C |

| | | | | | | |
|---|-------|--------------------------|-------|-----------|-------|-------|
| <p>This role is customized in both the destination and package.</p> <p>This role's custom role-list is updated to match the package's.</p> | A,B,C | Any | X,Y,Z | X,Y | X,Y,Z | X,Y |
| <p>This role's custom role-list has no enabled options in the package.</p> <p>This role's custom role-list will have no enabled values.</p> | A,B,C | Any, Empty, or Undefined | X,Y,Z | Empty | X,Y,Z | Empty |
| <p>This role is customized in the destination but not in the package.</p> <p>This role's custom role-list is reduced to the values present in both the destination's custom</p> | A,B,C | A,C | A,B,E | Undefined | A,B,E | A |

| | | | | | | |
|---|-------|-----|-------|-----------|-------|-------|
| role-list and the package's default role-list. | | | | | | |
| <p>This role is customized in the destination but not in the package.</p> <p>This role's custom role-list will have no enabled values since there is no overlap between the destination's custom role-list and the package's default role-list.</p> | A,B,C | Any | X,Y,Z | Undefined | X,Y,Z | Empty |
| <p>This role is customized in the destination but not in the package.</p> <p>This role's custom role-list will have no enabled values</p> | A,B,C | C | A,B,E | Undefined | A,B,E | Empty |

| | | | | | |
|---|--|--|--|--|--|
| since there is no overlap between the destination's custom role-list and the package's default role-list. | | | | | |
|---|--|--|--|--|--|

For more information about creating role-based custom dropdown lists, please refer to the [Dropdown Editor](#) documentation.

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

Sugar Portal

Overview

The Sugar Portal is used by customers to access and view specific information in your instance or create new records in your instance. The portal allows customers with valid login credentials to access [cases](#), [bugs](#), and [knowledge base](#) records, and the ability to update their [contact](#) information. Administrators can configure portal settings, the look and feel of the theme, and the layout configurations via Admin > Sugar Portal.

For more information on how a Sugar user can interface with the portal, please review the [Portal Deployment User Guide](#).

For more information on how your customers can interface with the portal, please review the [Portal User Guide](#).

Configure Portal

Multiple settings for the portal can be edited in the Configure Portal menu in the Sugar Portal section of Admin menu. This is the first place to look when initially enabling and setting up your portal. This menu includes the following options:

| Field name | Description |
|------------|-------------|
|------------|-------------|

| | |
|---|---|
| Configure Portal | Select the "Enable" checkbox to have the portal enabled for customers. After enabling the portal and clicking "Save" at the bottom of the page, the portal URL will appear under the Enable checkbox. This is the URL where the portal for your instance can be accessed. |
| Logo URL | Add a URL to an image or logo to this field so that your company logo will show on the login page of the portal. Note: The image must have a publicly accessible URL and cannot be uploaded from your local machine. The recommended size of the image is 163 × 18 pixels. |
| Number of records to display on list | Enter the number of how many records will show when viewing a dashlet or list view in the portal. Default is 20. Note: This value must be no greater than 100. |
| Default assigned for new portal registrations | When a user tries to register for the portal and creates a lead in Sugar, this designation defines the user assigned to the lead. |

Enabling Sugar Portal automatically creates a Customer Self-Service Portal Role and a portal API user called "Sugar Customer Support Portal" which can be viewed in the [Roles](#) and [Users](#) modules, respectively. You can use Access controls within the role to enable and/or disable the Bugs, Cases, or Knowledge Base modules for the Sugar portal. The Sugar Customer Support Portal user is used to authenticate customer requests to the portal. Please do not modify any other Access controls or the field level permissions for this role to avoid unknown and unpredictable system behavior.

Note: If the Customer Self-Service Portal Role or Sugar Customer Support Portal user are accidentally deleted, please disable and re-enable the Sugar Portal to recreate the role and user.

After the Configure Portal's save button, there may be a section of text showing a list of any modules that are currently disabled in [Display Modules and Subpanels](#).

Default assigned for new portal registrations:

The following module(s) are disabled:

- Cases

If you would like to enable them in the portal please enable them [here](#).

If a module is disabled, it will not appear in the Sugar Portal. The modules that will show here are Cases, Bugs, and Knowledge Base.

Theme Portal

Sugar Portal Editor allows you change the colors of the navigation bar, the line under the navigation bar, and the main button in each Sugar Portal page to match your company's color scheme.

The theme menu allows you to configure the following elements on the portal page:

- **Border Color** : The line separating the Navigation Bar and the rest of the page.
- **Navigation Bar** : The bar at the top of the screen that includes module tabs and the search bar.
- **Primary Button** : The button on the page that contains the primary function, usually Save or Edit.

To change the color of one of the elements, click the text box to the right of the current color to drop down a color palette editor. Use the vertical slider on the right to select the color group, and then the shade from the main window in the center. The selected color is shown on the bottom horizontal bar. Click anywhere on the page to confirm your color for the given element.

Note: If you know the HTML color code for your company's colors, you can manually enter this in the text box.

After selecting your colors, a preview will show on the right of the screen as to how the elements will appear in the portal. After confirming the proper colors, click "Save and Deploy" to push the changes to your portal.

If you are editing the colors and do not like your changes, click "Reset" to return to your most recently saved color options. You can also click "Restore Default Theme" to return to the Sugar stock colors (border - red, navigation bar - black, primary button - blue).

Layouts

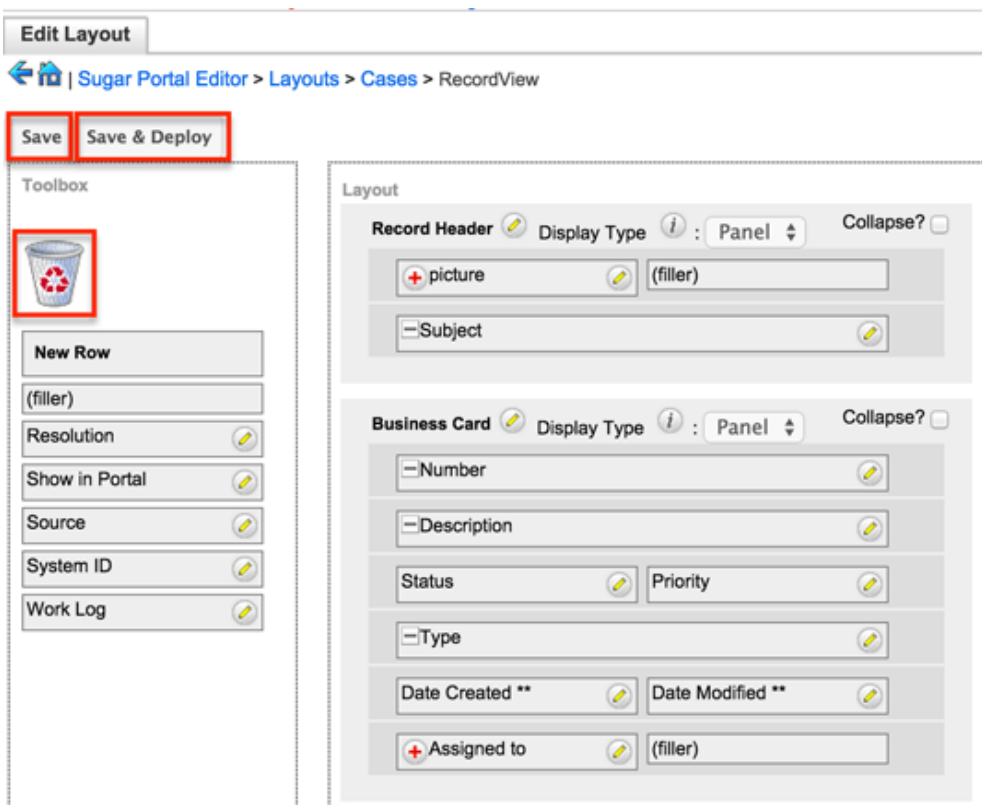
Sugar Portal Editor allows you to manipulate the [record view](#) and [list view](#) of the modules customers see in the portal. These layouts are configured with stock fields when the portal is initially enabled, but as additional fields are created in [Studio](#), you may want to add them to the portal layouts to mimic other Sugar layouts in Studio.

Record View

The Portal record view will be seen by customers when creating or viewing a case or bug report and when viewing or editing contact information under their user profile.

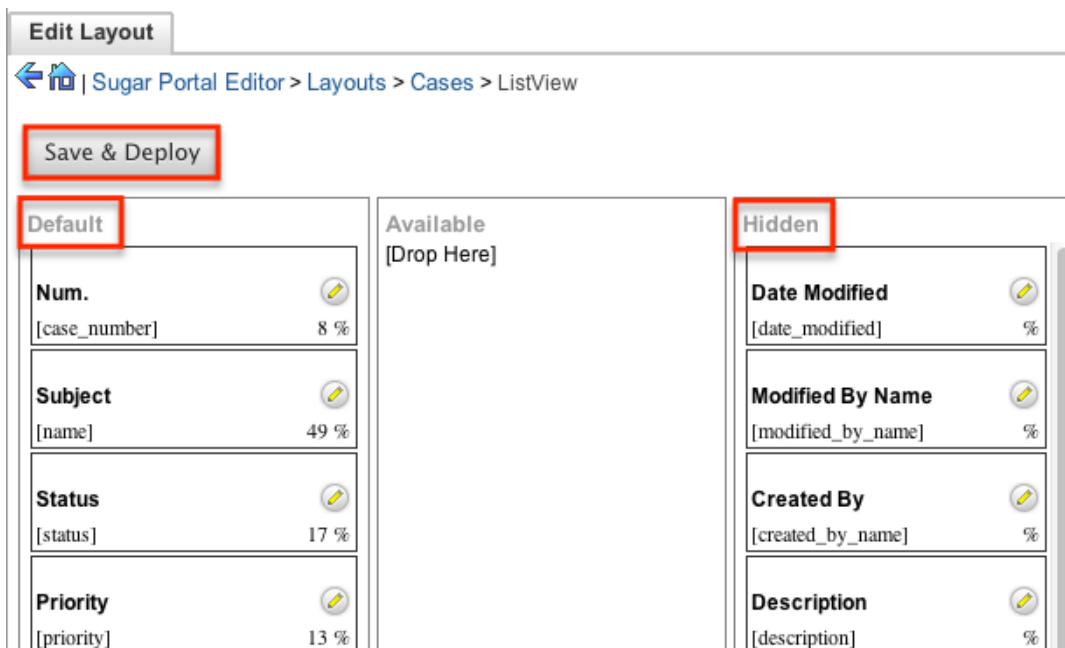
Note: The Contacts layouts define the portal user's profile layouts.

The editor allows you to drag and drop fields into the layout to add or rearrange the page. Fields can be removed from the layout by dragging and dropping them onto the recycling bin icon. After the layout is configured the way you want customers to see it, click "Save & Deploy" to push the changes to the portal. If you would like to save your work, but not deploy the changes, simply click "Save". For more information on editing the record view layout, please refer to the [Studio](#) documentation.



List View

The Portal list view is the view that will be used by customers when viewing the list of all bugs, cases, or Knowledge Base articles. The editor allows you to drag and drop fields into the layout's "Default" column and rearrange the order of them. Fields can be removed from the layout by dragging and dropping them to the "Hidden" column. After the layout is set up the way you would like for customers to access it, click "Save & Deploy" which will push the changes to the portal. For more information on editing the list view layout, please refer to the [Studio](#) documentation.



Note: Clicking the pencil to the right of any field will allow you to edit the name of the field as it shows on the portal and also the percentage of the list view layout that you would like to take the field to take.

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Workflow Management

Overview

Important Note: New workflow processes should be created using Sugar Process Author since the legacy Workflow module will be deprecated in a future release. Existing workflow processes should also be re-created in Sugar Process Author. For information on using Process Author, please refer to the [Process Author](#) documentation.

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 when certain conditions are met. 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:

- Manually saving a record
- Mass updating records
- [Importing](#) records
- Another workflow updating a record
- Reassigning Records via [User Management](#)
- Updating or creating a record via [plug-ins](#)
- Updating or creating a record via [Sugar mobile applications](#)
- Updating or creating a record via the [portal](#)
- Updating or creating 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

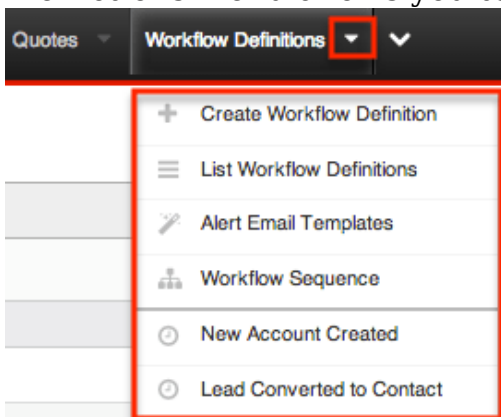
The Workflow module contains seven fields that will retain both functional and organizational purposes in Workflows. These fields cannot be edited or added to because of their functional purposes in the workflow process.

| Field | Dropdown Options | Description |
|-------------|---|--|
| Applies To | <ul style="list-style-type: none">• 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 character limit) | A description of this workflow and its purpose |

| | | |
|------------------|--|--|
| Execution Occurs | <ul style="list-style-type: none"> • 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 | <ul style="list-style-type: none"> • 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 | <ul style="list-style-type: none"> • 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 to access the Workflows list view. You may also click the triangle in the Workflow Definitions tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The



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.



Product and Quotes

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.

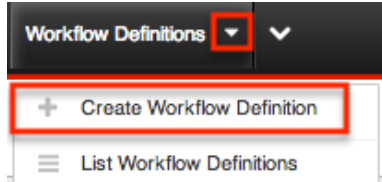
Creating Via Workflow Module

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. Click the triangle in the Workflow Definitions tab to open the Actions menu 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".

Create

A screenshot of a form titled 'Create'. At the top, there are two buttons: 'Save' and 'Cancel'. Below them, there are two input fields. The first field is labeled 'Name: *' and contains the text 'Converted Account from Lead'. The second field is labeled 'Execution Occurs: *' and has a dropdown menu with the selected option 'When record saved'.

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](#).

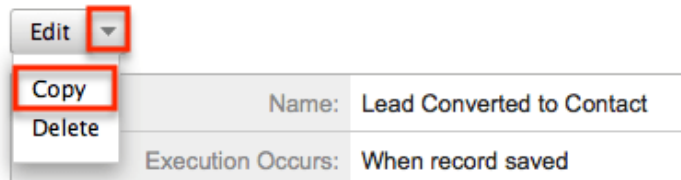
Creating Via Duplication

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 the 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 "Copy".

Lead Converted to Contact



Edit ▼

Copy

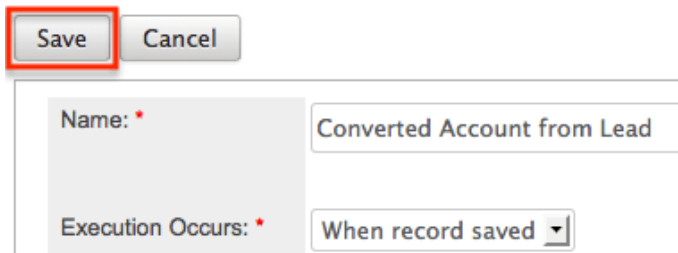
Delete

Name: Lead Converted to Contact

Execution Occurs: When record saved

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

Create



Save Cancel

Name: * Converted Account from Lead

Execution Occurs: * When record saved ▼

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.

When these conditions are met:

Conditions

Create

Description:

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 ("When record saved" or "After time elapses") you have chosen for the workflow.

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.

These operations will be performed:

Alerts

Create ▾

Details Type:

Event Description:

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.

The screenshot shows a form with the following elements:

- Buttons: "Save" (highlighted with a red box) and "Cancel".
- Field "Name: *": Text input containing "New Customer Alert Email".
- Field "Alert Type": Dropdown menu showing "Email".
- Field "Source Type": Dropdown menu showing "Custom Template".
- Field "Custom Template": Dropdown menu showing "New Account Template".
- Text: "* Indicates" in the top right corner.

On the next screen, click "Create" on the "Alert Recipient List" subpanel to choose your recipients.

New Customer Alert Email

Edit Delete

| | |
|-------------|-------|
| Name: | New C |
| Alert Type: | Email |

Alert Recipient List

Create

Alert Recipients:

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.

Edit Delete

User who creat

User who last n

User who is ass

User who was assigned the record

A user associated with the target module

[User](#) who is assigned the record using address:

Save Cancel

Please Select

User's Manager

✓ User

Save Cancel

Alert Recipient List

Create

Alert Recipients:

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 Email

| | | | |
|----------------------|--------------------------|---|-----------------|
| Edit | Delete | Return to Workflow Definition | |
| Name: | New Customer Alert Email | Source Type: | Custom Template |
| Alert Type: | Email | | |

Alert Recipient List

[Create](#)

Alert Recipients:

| | |
|---|------------------------|
| Send alert to the following recipient: A user associated with the target module | remove |
|---|------------------------|

After the alert has been created, it will appear in the [Alert Subpanels](#).

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](#)

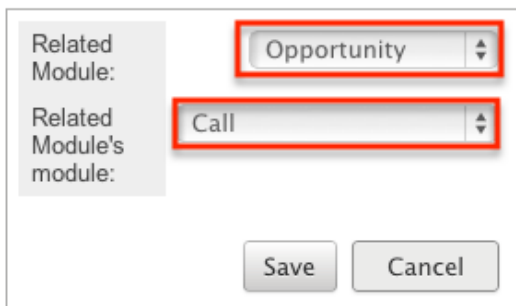
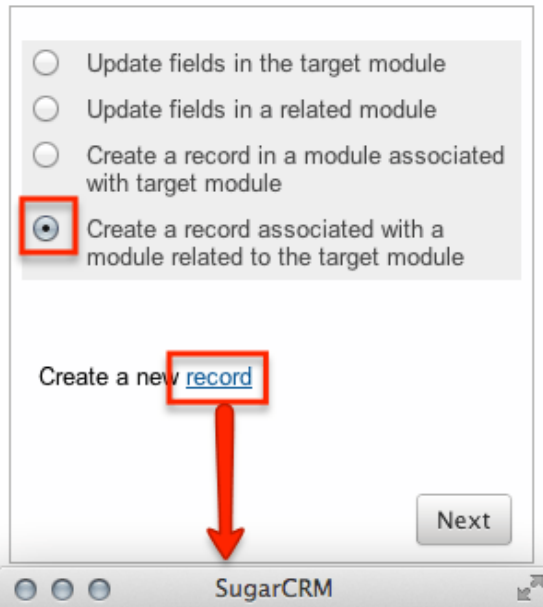
Details Type: Event Description:

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](#).

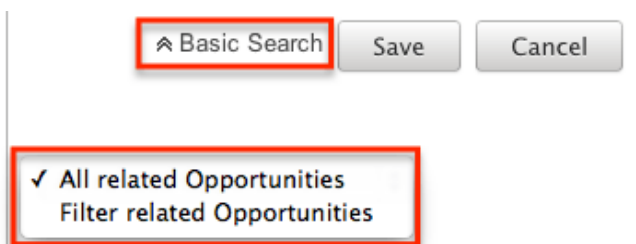
Workflow Action Types

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 to 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 Opportunity.



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 (Opportunities), 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 match the primary team 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

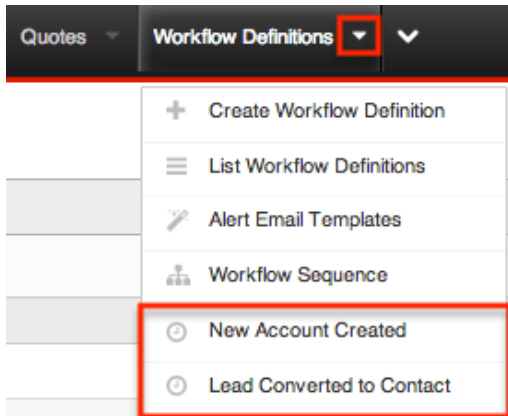
The Workflow Definitions list view displays all records meeting the current search criteria. To access the list view, simply click the Workflow Definitions module tab, which is made available by navigating to Admin > Workflow Management. While list view shows key workflow fields, you can click the workflow 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. Click the Actions menu in 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".

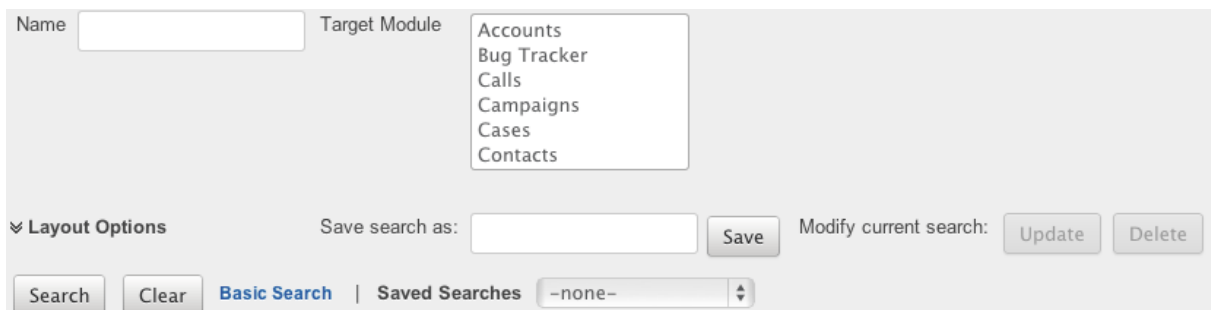
When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. Once the search is complete, the relevant results will populate in the [list view](#) beneath the search panel. To see all workflow definitions, simply click "Clear" and then "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.



The Advanced Search panel includes a "Name" input field, a "Target Module" dropdown menu with options: Accounts, Bug Tracker, Calls, Campaigns, Cases, and Contacts. Below this is an expandable "Layout Options" section. To the right, there is a "Save search as:" input field with a "Save" button, and a "Modify current search:" section with "Update" and "Delete" buttons. At the bottom, there are "Search" and "Clear" buttons, a "Basic Search" link, and a "Saved Searches" dropdown menu currently showing "-none-".

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](#) beneath the search panel. To see all workflow definitions, simply click "Clear" and then "Search" to perform a blank search with no filters.

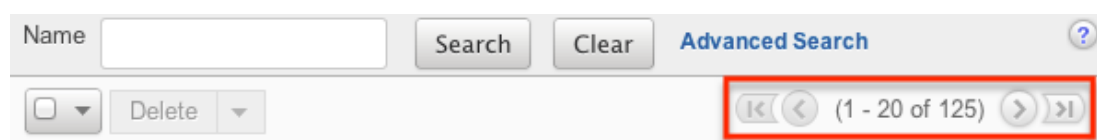
Workflows List View

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.

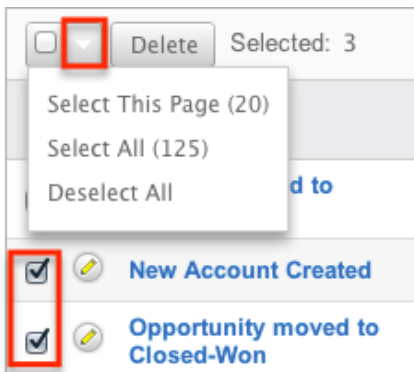


Checkbox Selection

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.

| Name | Execution Occurs | Status | Target Module |
|---------------------|-------------------|--------|---------------|
| New Account Created | When record saved | Active | Accounts |

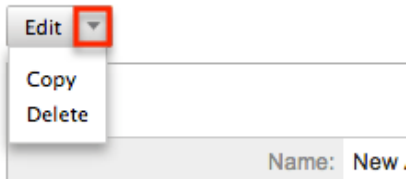
Workflow Detail View

The Workflow Definition detail view displays thorough workflow information including all workflow fields. You will also see the Conditions, Alerts, and Actions subpanels 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 |
| Copy | 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 displays the "Detail"s, "Type", and "Event Description" for each condition. After an alert has been created, there is also a column for Recipients. The "Event Description" is automatically generated and provides a brief explanation of the alert with 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 or 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

The screenshot shows the Alerts subpanel. At the top left is a 'Create' button. Below it is a table with three columns: 'Details', 'Type', and 'Event Description'. The 'Details' column contains a 'Hide' button. The 'Type' column contains 'Alerts' and a 'Recipients' icon. The 'Event Description' column contains the text 'Send New Account Created using a Custom Template: New Account Template'. To the right of the table are 'edit' and 'remove' buttons. Below the table, there is a bullet point: '• 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

The screenshot shows the Actions subpanel. At the top left is a 'Create' button. Below it is a table with three columns: 'Details', 'Type', and 'Event Description'. The 'Details' column contains a 'Hide' button. The 'Type' column contains 'Actions'. The 'Event Description' column contains the text 'Update fields in the target module'. To the right of the table are 'edit' and 'remove' buttons. Below the table, there is a bullet point: '• 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

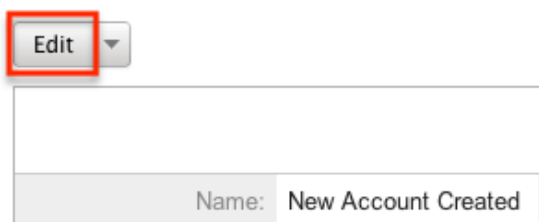
Workflows edit view. Edit view is available within the Workflows module and includes all of the Workflow fields. It can be accessed either via the detail view or list view. Please note that Conditions, Alerts, and Actions are not edited through the Workflow edit view.

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.

New Account Created



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 |

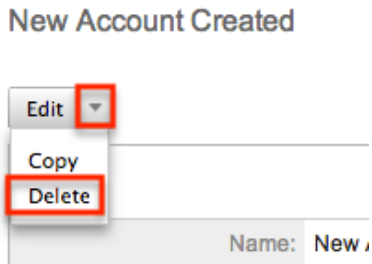
Deleting Workflows

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.

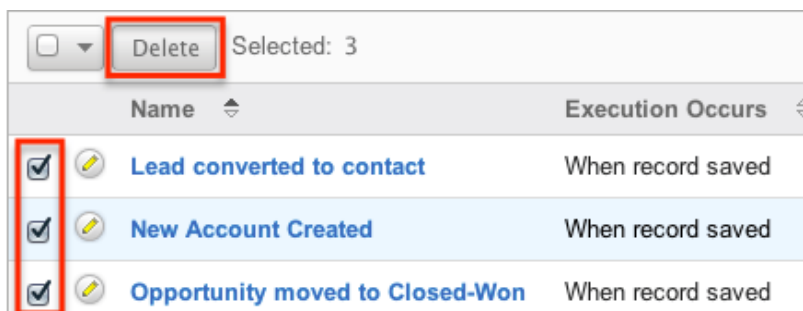


3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

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 WYSIWYG (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

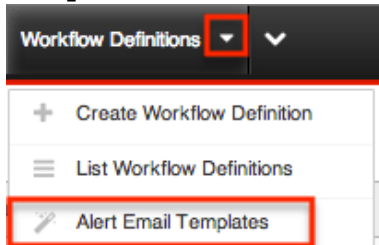
Alert Templates are created only via the Workflow module. Alert templates can be created either directly from the workflows module via the Alert Templates page, or via duplication. The Target Module is defined during the creation process, and then a full edit view layout opens including all fields that 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.

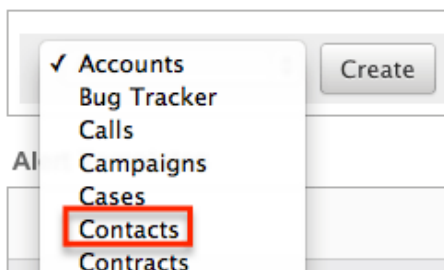
Use the following steps to create the template via Workflow Management:

1. Navigate to Workflow Management via the Admin menu.
2. Click the triangle in the Workflow Definitions tab and select "Alert Email Templates".



3. Choose which module the template will be for using the provided dropdown list and click "Create".

Alert Templates



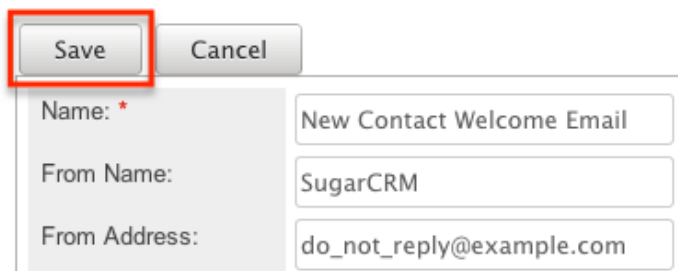
4. Complete the fields on the screen as follows. Any required fields are marked with a red asterisk and must be completed:
Name : Enter an internal name for the email template.
Type : Keep as "Workflow".
From Name : The name that the email recipient will see as the sender.
From Address : The email address 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 of 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.



The image shows a form for configuring an email template. 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 three input fields. The first field is labeled "Name: *" and contains the text "New Contact Welcome Email". The second field is labeled "From Name:" and contains the text "SugarCRM". The third field is labeled "From Address:" and contains the text "do_not_reply@example.com".

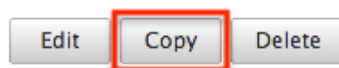
Creating Alert Templates Via Duplication

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 "Copy".

New Contact Welcome Message

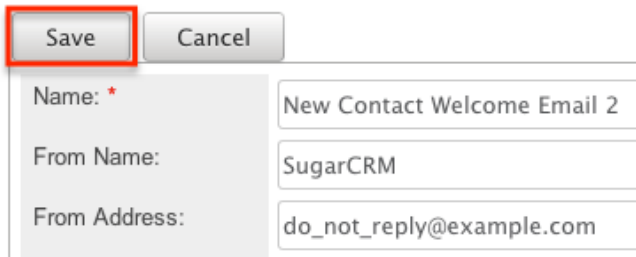


The image shows a row of three buttons: "Edit", "Copy", and "Delete". The "Copy" button is highlighted with a red rectangular box.

Name: New Contact Welcome Message

3. 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

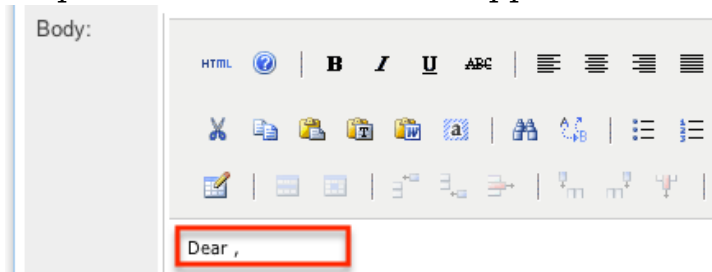
From Name: SugarCRM

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:

1. Click to place your cursor on the location in the subject or body where the recipient's first name should appear.

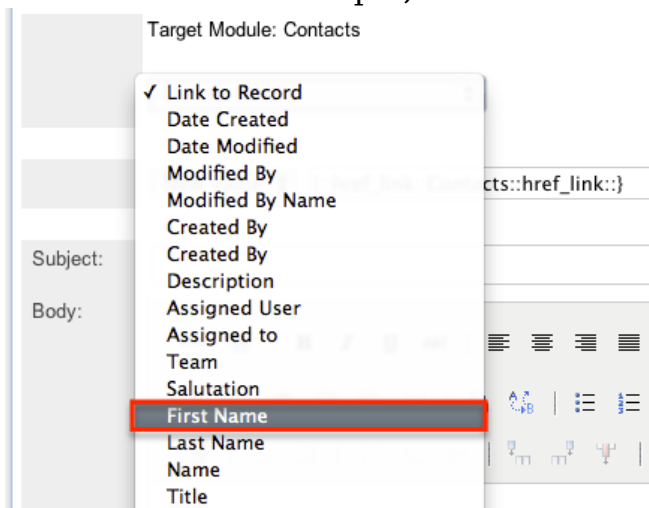


Body:

HTML | B | I | U | ABC | [List Icons]

Dear ,

2. Set the variable dropdown to the desired field from the workflow's target module. For our example, select "First Name".



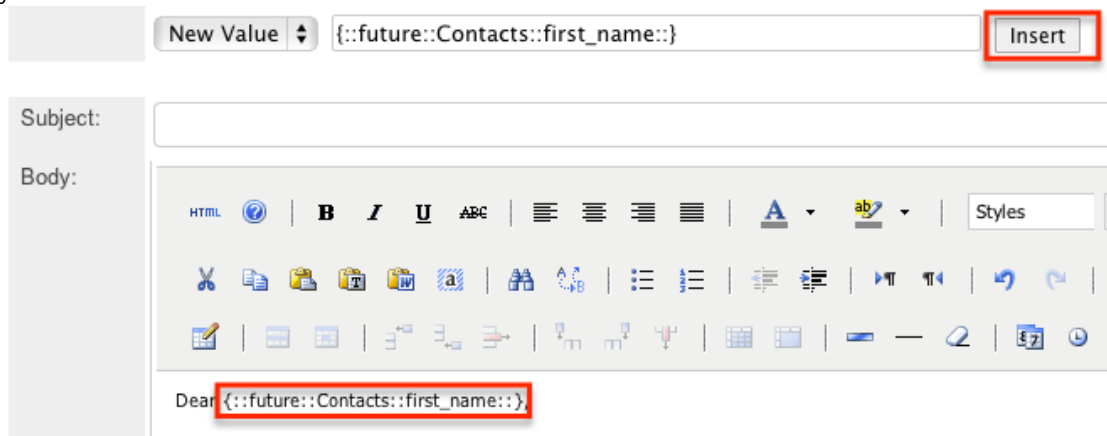
Target Module: Contacts

- ✓ Link to Record
- Date Created
- Date Modified
- Modified By
- Modified By Name
- Created By
- Created By Name
- Description
- Assigned User
- Assigned to
- Team
- Salutation
- First Name**
- Last Name
- Name
- Title

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 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

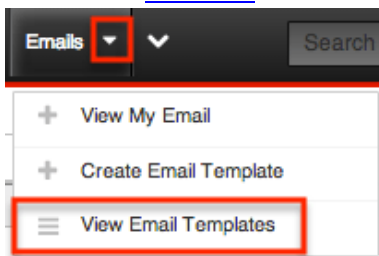
Viewing Alert Templates Via Detail View

The Alert Templates 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.

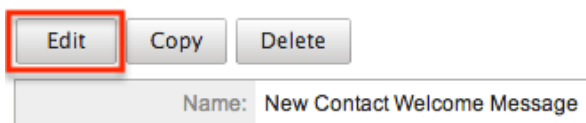


This will bring you to the [Email Templates list view](#) where you can select which template you would like to view. For more information on navigating the Emails module, please review the [Emails](#) module section of the Application Guide.

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 Message



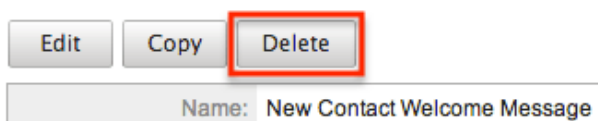
Deleting Alert Templates

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 Alert Templates detail view.
2. Click the Delete button.

New Contact Welcome Message



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 Templates list 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.

Time Intervals for Time Elapsed Workflows

Time elapsed workflows trigger after a specified amount of time has passed from

when the record was saved. Users with administrator or developer access have the ability to add new time intervals to the dropdown list ("tselect_type_dom") used for time elapsed workflows. The time interval dropdown list can be viewed and edited via Admin > Dropdown Editor. For more information on Dropdown Editor, please refer to the [Developer Tools](#) documentation.

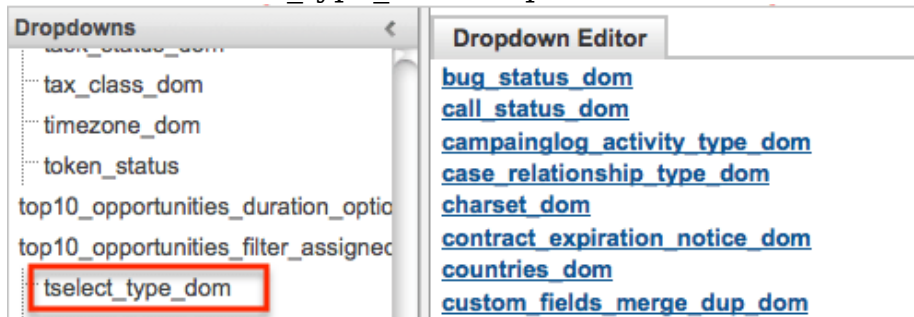
By default, the time intervals are:

4 days 5 days 1 week 2 weeks 3 weeks

| | | |
|----------|----------|---------|
| 0 hours | 3 days | 30 days |
| 4 hours | 60 days | |
| 8 hours | 90 days | |
| 12 hours | 120 days | |
| 1 day | 150 days | |
| 2 days | 180 days | |

The following steps cover adding a 1 hour time interval to the dropdown list via Dropdown Editor as an example:

1. Navigate to Admin > Dropdown Editor.
2. Locate the tselect_type_dom dropdown list and click to view the details.



3. Enter in an item name (e.g. 3600) and display label (e.g. 1 hours) into the corresponding fields below the existing item list.
 - o Please note that the Item Name field must be in seconds equaling to the hours, days, weeks you wish to add.

| | | |
|-----------------------|--|--|
| • 7776000 [90 days] | | |
| • 10368000 [120 days] | | |
| • 12960000 [150 days] | | |
| • 15552000 [180 days] | | |

Item Name:

Display Label:

-
- Click "Add" to add the new value to the dropdown list.
 - Note: The value will be added to the end of the list, but you can drag and drop the item to the top of the list if you wish. For more information on how to reorder and position values in the dropdown list, please refer to the [Developer Tools](#) documentation.

Dropdown Editor Edit Dropdown ×

Save Undo Redo Cancel

Name: tselect_type_dom
Language: English (US)

List Items:

| Item Name | Display Label |
|-----------|---------------|
| 0 | [0 hours] |
| 3600 | [1 hours] |
| 14440 | [4 hours] |

- Once the item has been added and placed in the correct position, click "Save" to preserve the change.

The newly added time interval will now appear in the corresponding dropdown list when creating the condition for a time elapsed workflow.

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:

- Navigate to Admin > Workflow Management.
- On the Workflow Definitions module tab, select "Workflow Sequence".
- Select the module you would like to reorganize from the dropdown menu and click "Select".

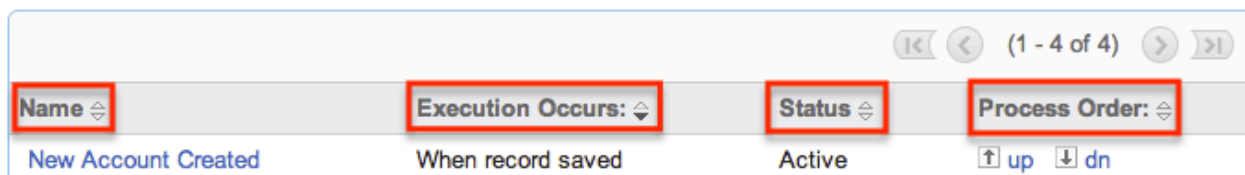
Workflow Sequence

Please select a module: ✓ Accounts
Contacts
Opportunities

Select

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



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: 11/30/2016 01:42am

Products and Quotes

Overview

The Products and Quotes configuration options in the Admin menu enable you to define a variety of options for the [Quoted Line Items](#), [Quotes](#), and [Revenue Line Items](#) modules. From the Products and Quotes option, users may access the following administrative modules:

| Menu | Description |
|------------------------------------|--|
| Product Catalog | List of products sold by your organization; used as a template for the |
| Product Categories | The categories in which your products are organized |
| Product Types | The Type dropdown list in the Product Catalog |
| Manufacturers | The Manufacturer Name dropdown list in the Product Catalog |
| Shipping Providers | The Shipping Provider dropdown list in |
| Tax Rates | The Tax Rate dropdown list in Quotes |

Please note that only users with administrator or developer access have the ability to control the configurations within this documentation.

Product Catalog

Sugar's Product Catalog module contains a list of all products or services that your organization sells. This module provides the [Quoted Line Items](#) and [Revenue Line Items](#) modules 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.

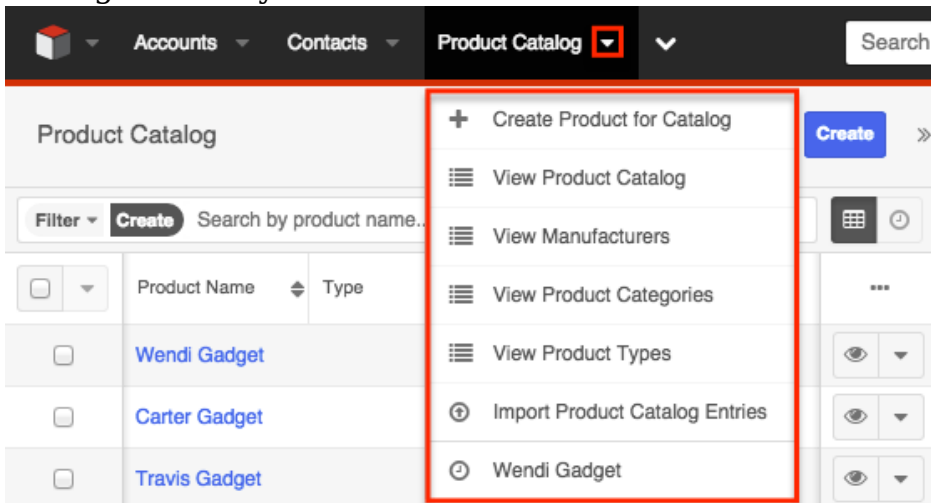
| Field | Description |
|-------------------------|---|
| Availability | Select if the item is in stock or not from the dropdown list |
| Category Type | The product category to which the new item belongs |
| Cost | The actual cost of the item. This will not appear on printed quotes |
| Currency | The currency 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 |

| | |
|-------------------|---|
| | <p>Unit Price field. The formulas are as follows:</p> <ul style="list-style-type: none"> • Fixed Price: Allows you to enter a Unit Price without any calculation. • 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 Name | 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 | <p>Enter the number of units that are in stock of the product</p> <p>Note: Negative values are supported in this field.</p> |
| 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 Note: Negative values are supported in this field. |

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 click the triangle in the Product Catalog 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 record 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 |
| View Manufacturers | Opens the Manufacturers list view |
| View Product Categories | Opens the Product Categories list view |

| | |
|--|---|
| View Product Types | Opens the Product Types list view |
| Import Product Catalog Entries | Opens the import wizard to create or update product catalog entries using external data |

Creating Products For Catalog

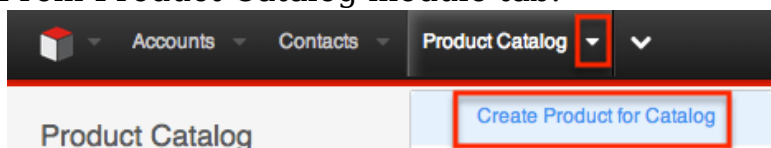
There are various methods for creating products in the Product Catalog including via the Product Catalog module, duplication, and importing products. The full record view layout opens when creating the product directly from the Products menu and includes all of the relevant fields for your organization's products. The Record 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

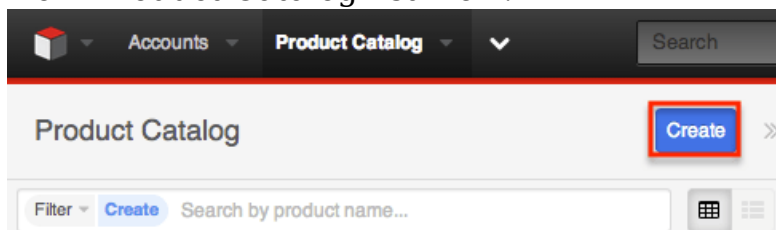
One of the most common methods of product creation is via the Create Product for Catalog option in the Product Catalog module tab. This opens up the record view layout which allows you to enter in all the relevant information for the product. Use the following steps to create a product via the Product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

1. Navigate to Admin > Product Catalog.
2. Click the triangle in the Product Catalog module tab to open the actions menu and select "Create Product for Catalog". You can also click the Create button on the upper right of the Product Catalog list view.

From Product Catalog module tab:

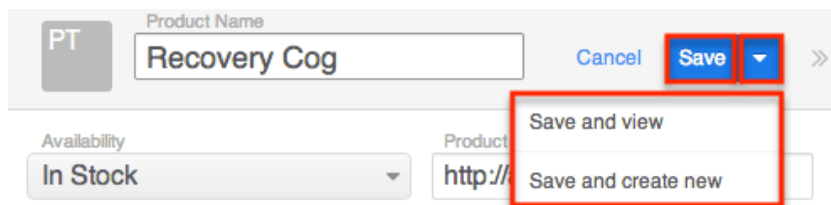


From Product Catalog list view:



3. Enter appropriate values for the [fields](#) in the record view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
4. Once the necessary information is entered, click "Save".
 - Alternatively, you can use the Actions Menu to the right of the Save

button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.

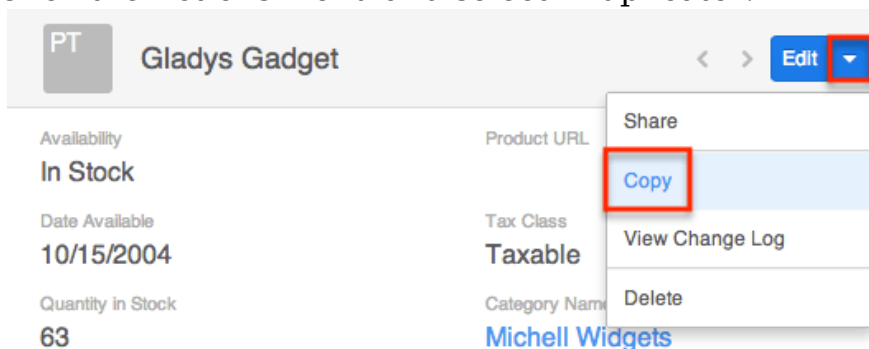


Creating Via Duplication

You can also create a new 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 record view.
2. Click the Actions menu and select "Duplicate".



3. The displayed record view is pre-populated with the original product's values. Update the necessary fields, then click "Save".
 - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.

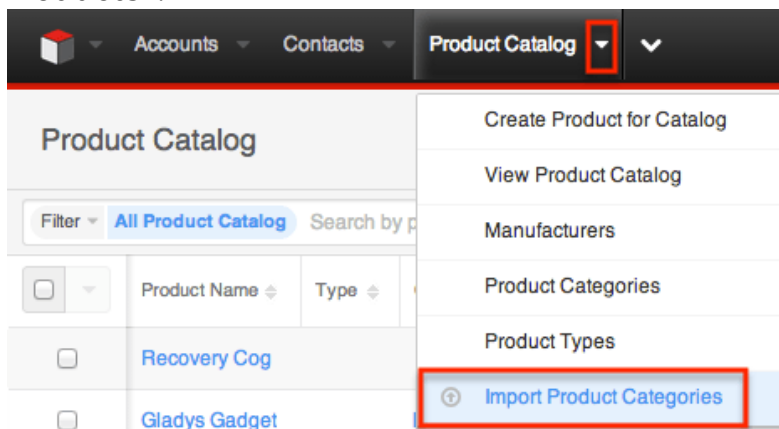


Importing Products for Catalog

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. Click the triangle in 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 record view, and Product Catalog Last Viewed menu.

Viewing Via List View

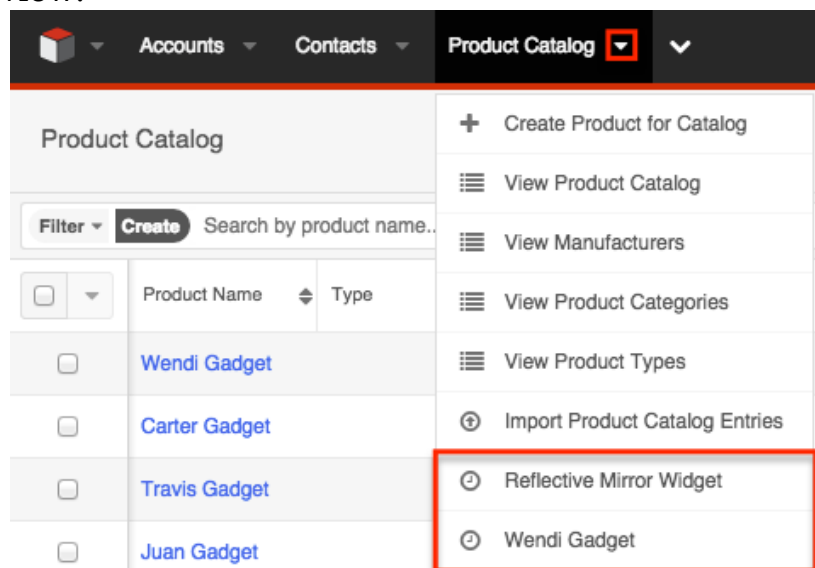
The Product Catalog list view displays all product catalog records meeting the current search criteria. To access the list view, simply click the Product Catalog module tab. While list view shows key product catalog fields, you can click the product's name to open the record in record view. For more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

Viewing Via Record View

The Product Catalog record view displays thorough product information including all product catalog fields followed by subpanels of the product's related records belonging to various modules. The record 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 record view, please refer to the [Product Catalog Record View](#) section of this documentation.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which products you have recently viewed. Click the Actions menu in the [Product Catalog module tab](#) to see a list of your most recently viewed products, and click each name to open the Product Catalog record view.



Searching Product Catalog

The Product Catalog list view includes a Module Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed,

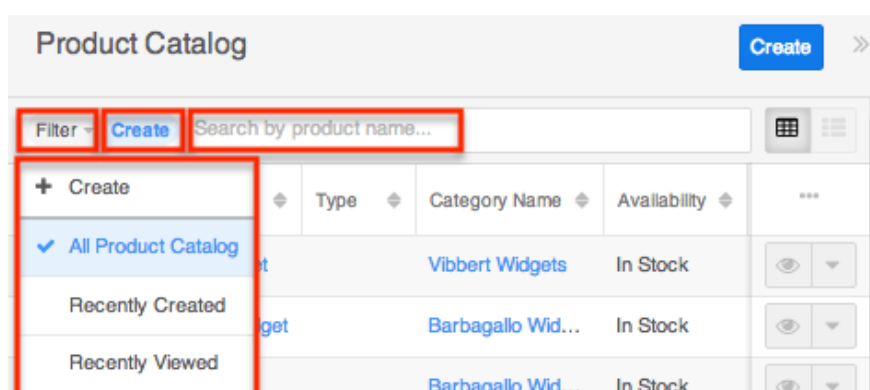
the relevant results will be displayed in the Product Catalog list view below. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like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

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

Module Search

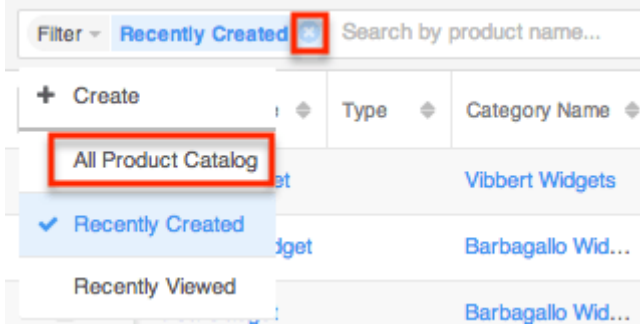
Module search enables users to easily search by product catalog name within the Product Catalog module and pull up matching records in the list view. The search also provides a Filter option which can be used in combination with the open Search box to narrow your search further using the available options as follows:

- Create : Create a new custom filter which you can use to filter your search
 - Note: You can also click "Create" to the right of the Filter option.
- All Product Catalog : Returns all records in the module to which you have access
- Recently Created : Returns only records you created in the module within the last 7 days
- Recently Viewed : Returns only records you have viewed in the module within the last 7 days



When you choose a filter, Sugar will return records which match both the selected filter and any name provided in the "Search by product name..." bar in the filtered list view results. For example, if you select "Recently Created" and enter a product catalog name, Sugar will only return product catalog records with a matching name that you created within the last 7 days. Once the search is complete, the relevant results will populate in the [list view](#) below the search panel. To see all

product catalog records to which you have access, simply select the All Product Catalog in the filter and remove any text from the search bar. You can also click the Clear icon within the selected filter option (e.g. Recently Created) in the Search bar to clear the filter and pull up all list view search results. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.



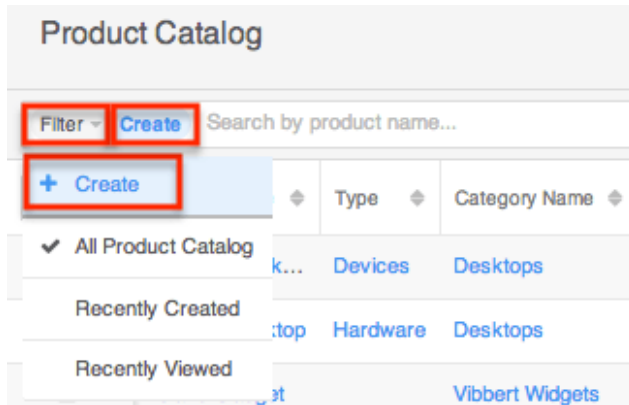
Creating a Filter

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

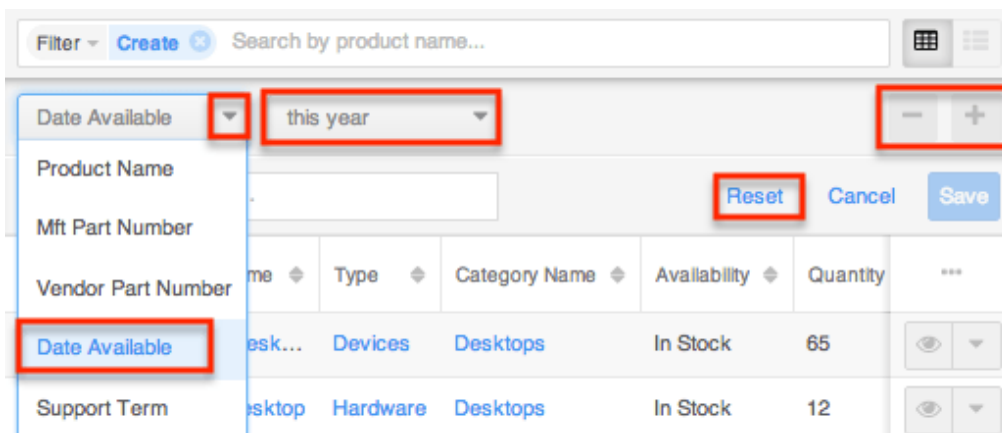
When you run a search using a created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.

The following steps cover creating a new Date Available filter as an example:

1. Click the Filter option on the Product Catalog search bar then select "Create".



2. Select the field you wish to add to your filter as well as the condition and matching criteria.
3. To add additional fields to the new filter, click the Plus button to the right of the filter.
 - o To remove fields from the new filter, click the Minus button to the right of the filter.
 - o To clear any filter values, simply click the "x" to the right of the value (if applicable) or select "Reset" to the left of the Save button.



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

Saving a Filter

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

The following steps cover saving a new search by Name filter as an example:

1. Create a [new filter](#) to perform a search on your desired fields.

-
2. Enter in a name for the new filter (e.g. "Available products this year").

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

Global Search

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



To use global search, you need to first enter the keyword into the search box. With Full Text Search enabled, pop-up results will begin appearing once you input three or more characters. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. When Full Text Search is not enabled, results starting with your keyword will appear after clicking the magnifying glass icon or hitting your Return/Enter key. For more information on using and configuring Global Search, please refer to the [Global Search](#) section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results. For more information on configuring your Global Search, please refer to the [Search](#) documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the [Studio](#) documentation as well as the [Search](#) section of the System documentation.

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. Please note that you will only be able to see product catalog records as allowed by your user access type (Developer) and assigned roles. For more information on roles, please refer to the [Role Management](#) documentation.

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

Checkbox Selection

You can perform several actions on 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 all product catalog records displayed on the current set of list view results, click the checkbox to the left of the Actions menu. A dialog will appear below the list view column headers indicating that you have selected all records on the list view's current results set (e.g. 20). To select all records matching the current search results set, click "Select all records" in the dialog.

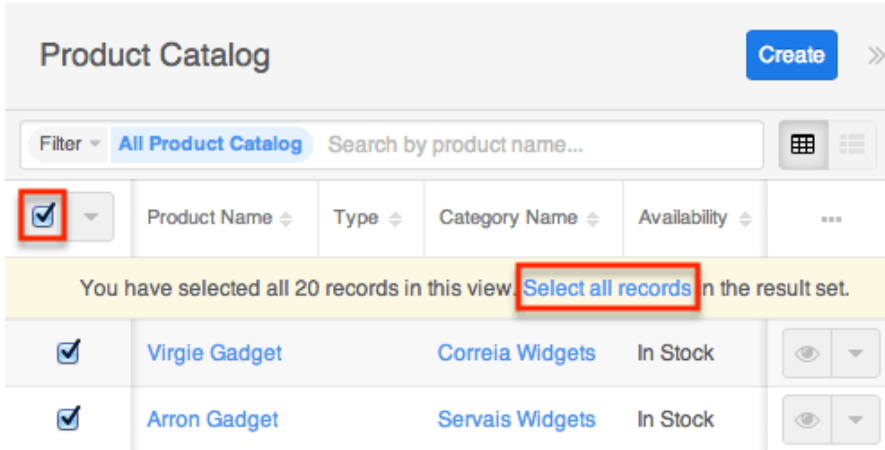
| <input checked="" type="checkbox"/> | Product Name | Type | Category Name | Availability | ... |
|--|----------------|------|----------------|--------------|-----|
| You have selected all 20 records in this view. Select all records in the result set. | | | | | |
| <input checked="" type="checkbox"/> | Whitney Gadget | | Aarons Widgets | In Stock | |
| <input checked="" type="checkbox"/> | Otha Gadget | | Aarons Widgets | In Stock | |

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

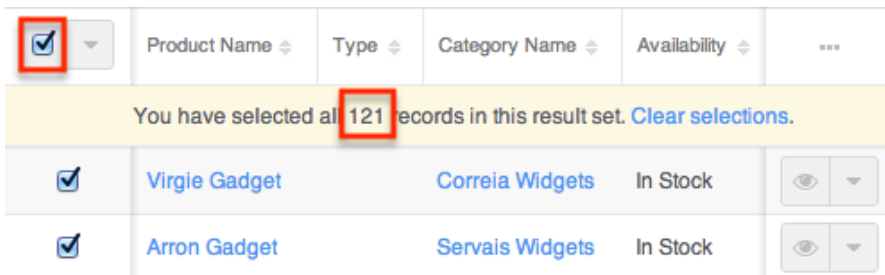
| <input checked="" type="checkbox"/> | Product Name | Type | Category Name | Availability | ... |
|---|----------------|------|----------------|--------------|-----|
| You have selected all 121 records in this result set. Clear selections. | | | | | |
| <input checked="" type="checkbox"/> | Whitney Gadget | | Aarons Widgets | In Stock | |
| <input checked="" type="checkbox"/> | Otha Gadget | | Aarons Widgets | In Stock | |

Total Record Count

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

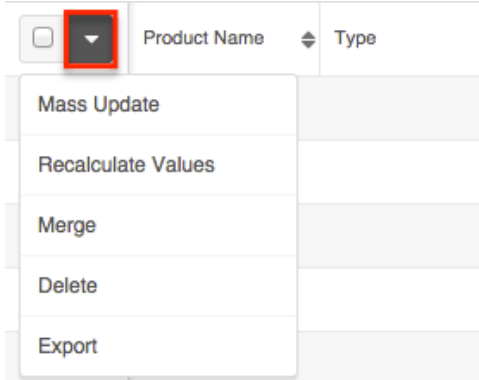


The total count of all records on the list view result set will appear in the dialog.



Mass Actions Menu

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



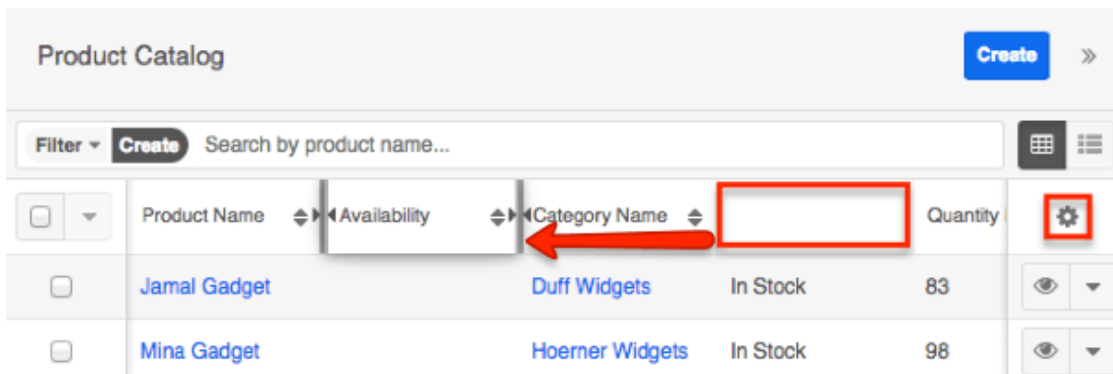
The options in the Mass Actions menu allow you to perform the following operations:

| Menu Item | Description |
|-----------------------------|---|
| Mass Update | Mass update one or more product catalog records at a time |
| Merge | Merge two or more duplicate products |

| | |
|------------------------------------|--|
| Delete | Delete one or more product catalog records at a time |
| Export | Export one or more product catalog records to a CSV file |
| Recalculate Values | (Available in certain circumstances) Updates calculated values to reflect changes to calculated fields made in Studio |

Column Reordering

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

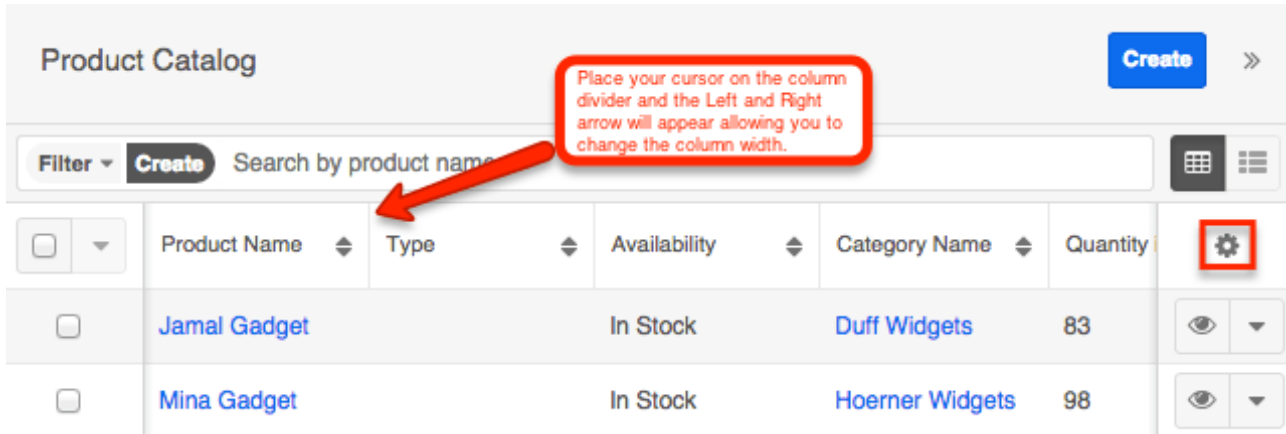


Column Resizing

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

default widths. For more information on how admins can set column widths, please refer to the [Studio](#) documentation.

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



Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows.

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




Column Selection

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

| Product Name | Type | Category Name | Quantity in Stock | |
|----------------|----------|------------------|-------------------|--|
| Ariane Gadget | Devices | Channell Widgets | | <ul style="list-style-type: none"> ✓ Product Name ✓ Type ✓ Category Name Availability ✓ Quantity in Stock ✓ Cost |
| Letitia Gadget | Hardware | Matzen Widgets | | |
| Marylin Gadget | Devices | Channell Widgets | | |
| Dani Gadget | Hardware | Stehlik Widgets | | |
| Cayla Gadget | Devices | Matzen Widgets | | |
| Shirley Gadget | Hardware | Galena Widgets | | |

Preview


Users can view a record's details directly from the Product Catalog list view by clicking the Preview icon to the far right of each product's row.

| | Product Name | Category Name | Availability | Quantity in Stock | Cost | |
|--|----------------|----------------|--------------|-------------------|----------|--|
| | Tabitha Gadget | Scaife Widgets | In Stock | 65 | \$457.00 |  |

The record's data will display to the right of the list view providing key information regarding the record. On the upper right of the intelligence pane, there is a Left and Right arrow button that allows you to scroll through the list view's current search results by previewing the next or previous record. To close the preview, simply click the "X" on the upper right of the intelligence pane.

Preview



< >
✕



| | |
|-------------------|--------------------------------|
| Product Name | Tabitha Gadget |
| Availability | In Stock |
| Product URL | |
| Date Available | 10/15/2004 |
| Tax Class | Taxable |
| Quantity in Stock | 65 |
| Category Name | Scaife Widgets |
| Manufacturer Name | TekWare Inc. |

Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to edit, follow, or delete specific records directly from the list view.

| Product Name | Category Name | Availability | Quantity in Stock | ... |
|----------------|----------------|--------------|-------------------|--|
| Tabitha Gadget | Scaife Widgets | In Stock | 65 |   |
| Dane Gadget | Bosco Widgets | In Stock | 23 | <div style="border: 1px solid red; padding: 2px;"> Edit Delete </div> |
| Toni Gadget | Wert Widgets | In Stock | 13 | |

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

| Menu Item | Description |
|------------------------|---------------------|
| Edit | Edit this product |
| Delete | Delete this product |

More Product Catalog

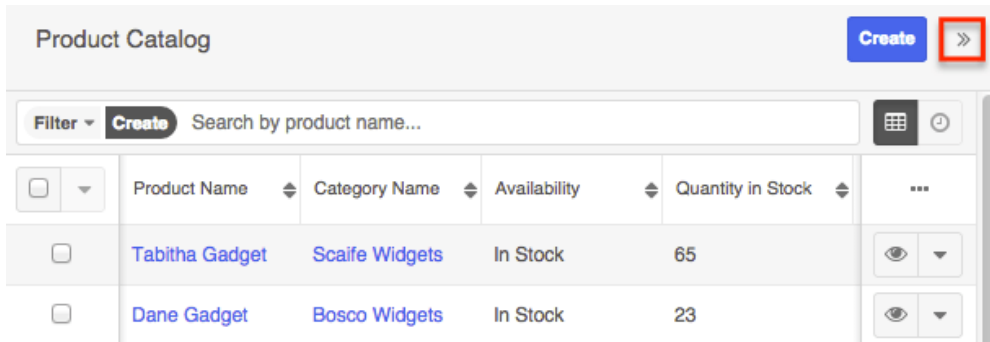
The list view loads an initial number of records meeting the current search criteria with the option to show additional results at the user's request. By default, Sugar displays 20 records per list view results set, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation. To load the next set of list view results, simply click the More Product Catalog link at the bottom of the list view.

| | | | |
|--------------------------|---------------|-------------------|----------|
| <input type="checkbox"/> | Nicole Gadget | Bevilacqua Wid... | In Stock |
| <input type="checkbox"/> | Chance Gadget | Bevilacqua Wid... | In Stock |

[More product catalog...](#)

Right Hand Side Drawer

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



Intelligence Pane

An intelligence pane displays to the right of the Product Catalog list view and can provide users with valuable record information via various dashlets. The Help dashboard normally displays by default along with the List View Help dashlet and Learning Resources dashlet. The List View Help dashlet provides users with a brief introduction to the module along with a link (e.g. Product Catalog documentation) to the corresponding documentation in the Administration guide. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the [Intelligence Pane](#) documentation. Users may create other dashboards (e.g. My Dashboard) for use with the Product Catalog module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do not wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Product Catalog module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the [Intelligence Pane](#) documentation.

The screenshot shows the 'Product Catalog' list view. The table contains the following data:

| Product Name | Type | Category Name | Availability | Quantity in Stock |
|------------------|----------|-------------------|--------------|-------------------|
| Dixie Gadget | | Hucks Widgets | In Stock | 53 |
| Sheryl Gadget | | Hucks Widgets | In Stock | 30 |
| Sammie Gadget | | Pitt Widgets | In Stock | 100 |
| Sebastian Gad... | | Hucks Widgets | In Stock | 29 |
| Germaine Gad... | | Pitt Widgets | In Stock | 131 |
| Haywood Gadget | | Sinquefield Wi... | In Stock | 76 |
| Erica Gadget | | Pitt Widgets | In Stock | 105 |
| Adeline Gadget | | Sinquefield Wi... | In Stock | 94 |
| TK 1000 Desktop | Devices | Desktops | In Stock | 72 |
| Tammie Gadget | | Mizer Widgets | In Stock | 36 |
| Wendy Gadget | | Sinquefield Wi... | In Stock | 102 |
| TK 1000 Desktop | Hardware | Desktops | In Stock | 65 |
| Quentin Gadget | | Mizer Widgets | In Stock | 100 |

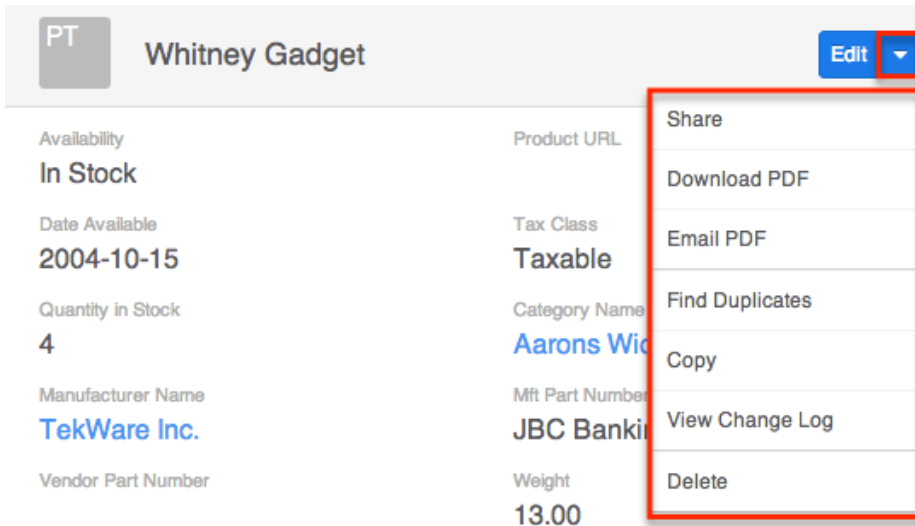
The sidebar on the right includes a 'Help Dashboard' with a 'Create' button (highlighted in red), 'List View Help' text, and 'Learning Resources' such as 'Sugar University', 'Community Forums', and 'Documentation & Support'.

Product Catalog Record View

The Product Catalog record view displays thorough product information including all product fields. The record view can be reached by clicking a product record's link in the Product Catalog list view. You have the ability to change the record view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation.

Actions Menu

The Actions menu on the top right of each product's record view allows you to perform various actions on the current record.

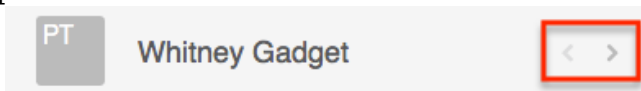


The options in the Actions menu allow you to perform the following operations:

| Menu Item | Description |
|---------------------------------|---|
| Edit | Edit this product |
| Share | Share a link to this product via email |
| Download PDF | Download product information as a PDF file |
| Email PDF | Email product information as a PDF attachment |
| Find Duplicates | Locate potential duplicates of this product |
| Copy | Duplicate this product |
| View Change Log | View a record of changes to this product |
| Delete | Delete this product |

Next or Previous Record

On the upper right of the Product Catalog record 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 Left arrow button displays the previous product of the current search results while clicking the Right arrow button displays the next product of the current search results.



Intelligence Pane

An intelligence pane displays to the right of the product catalog's record view and can provide users with valuable information via various dashlets. The Help dashboard normally displays by default along with the Record View Help dashlet and Learning Resources dashlet. The Record View Help dashlet provides users with a brief introduction to the module along with some instructions to help users utilize and navigate around the record view. A link to the corresponding documentation (e.g. Product Catalog documentation) in the Administration guide is also provided within the Help dashlet. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the [Intelligence Pane](#) documentation. Users may create other dashboards (e.g. My Dashboard) for use with the Product Catalog module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do not wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Product Catalog module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the [Intelligence Pane](#) documentation.

The screenshot displays the 'TK 1000 Desktop' record in the Product Catalog. The main area is divided into two columns of fields:

| | |
|--|---|
| Availability In Stock | Product URL |
| Date Available 10/15/2009 | Tax Class Taxable |
| Quantity in Stock 72 | Category Name Desktops |
| Manufacturer Name Acme Suppliers | Mft Part Number XYZ7890122222 |
| Vendor Part Number | Weight 20.00 |
| Type Devices | Cost \$500.00 |
| Cost USD \$500.00 | Date-Cost-Price |
| Unit Price \$800.00 | Discount Price USD \$800.00 |
| List Price \$800.00 | List USD \$800.00 |
| Default Pricing Formula Same as List | |
| Description | |
| Support Name | Support Desc |
| Support Contact | Support Term |

The right sidebar features a 'Help Dashboard' with a 'Create' button, 'Record View Help' text, and 'Learning Resources' including 'Sugar University', 'Community Forums', and 'Documentation & Support'.

Editing Products

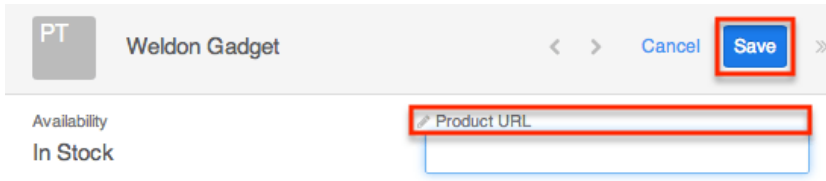
The Product Catalog may be edited at any time to update or add information to the record. You can make changes to existing product catalog records via the Product Catalog record view. Record view is available within the Product Catalog module and includes all of the Product fields you should need.

You may configure the Product Catalog record view via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#) documentation in the Administration guide.

Editing Inline Via Record View

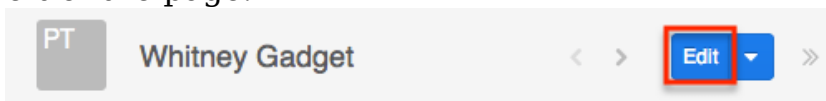
Users can edit individual fields on a product catalog record view without entering the full edit mode by clicking the field name. Fields which are available for inline

editing will display a pencil icon when hovering on the field name or value. This will allow users to type or select a new value. Click "Save" to preserve the changes made to the field.

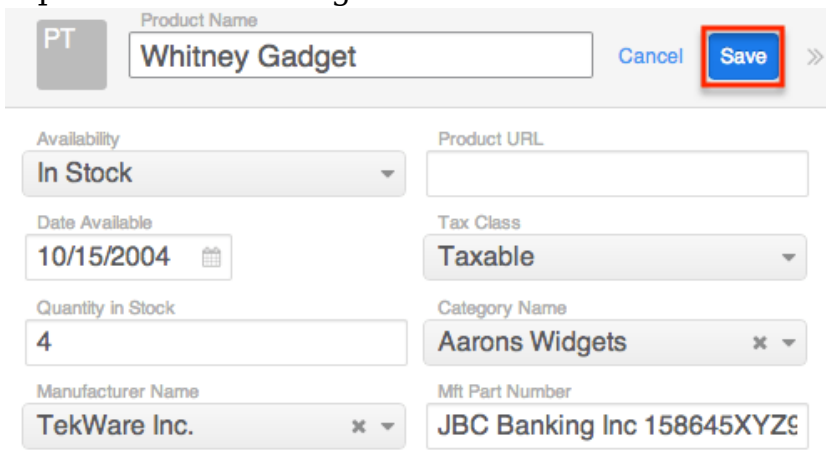


Editing Via Record View

You can edit products via the [record view](#) by clicking the Edit button on the upper left of the page.




Once the record view layout is open, update the necessary fields, then click "Save" to preserve the changes made.



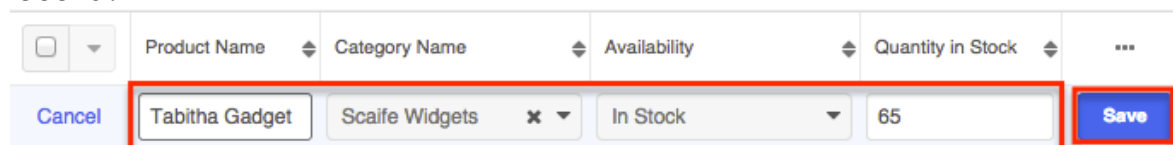
Editing Inline Via List View

You can also edit individual fields on the Product Catalog list view without entering the full edit mode. Click the Record Actions menu to the far right of the record's row and select "Edit".

| <input type="checkbox"/> | Product Name | Category Name | Availability | Quantity in Stock | ... |
|--------------------------|----------------|----------------|--------------|-------------------|---|
| <input type="checkbox"/> | Tabitha Gadget | Scaife Widgets | In Stock | 65 |  |
| <input type="checkbox"/> | Dane Gadget | Bosco Widgets | In Stock | 23 | Edit |
| <input type="checkbox"/> | Toni Gadget | Wert Widgets | In Stock | 139 | Delete |

The fields on the record's row will open up allowing you to type or select a new value. You can click the [double arrow](#) icon on the upper right of the page to

expand the list view for editing. Click "Save" to preserve the changes made to the record.



The screenshot shows a table with columns: Product Name, Category Name, Availability, and Quantity in Stock. The row for 'Tabitha Gadget' is highlighted with a red box. The 'Save' button is also highlighted with a red box.

Note: Text area fields are not inline editable from list views.

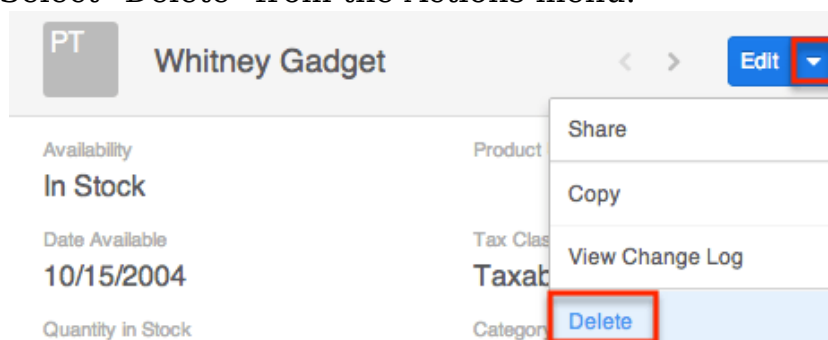
Deleting Products

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 record view or list view. Deleting via the record view allows you to delete a single record while the list view allows for mass deleting multiple records at once as well as single record deletions.

Deleting Via Record View

Use the following steps to delete a product catalog record via the record view:

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



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

Deleting Via List View

Use the following steps to delete a product catalog record via the list view:

1. Navigate to the Product Catalog list view by navigating to Admin > Product Catalog.

2. Use the [Module Search](#) to find the Product Catalog records you wish to delete.
3. Click the Record Actions Menu to the far right of the record's row and select "Delete".

| Product Name | Category Name | Availability | Quantity in Stock | ... |
|----------------|----------------|--------------|-------------------|--------|
| Tabitha Gadget | Scaife Widgets | In Stock | 65 | ▼ |
| Dane Gadget | Bosco Widgets | In Stock | 23 | Edit |
| Toni Gadget | Wert Widgets | In Stock | 13 | Delete |

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

Mass Deleting Via List View

Use the following steps to delete one or more product catalog records via the list view:

1. Navigate to the Product Catalog list view by navigating to Admin > Product Catalog.
2. Use the [Module 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 then choose "Delete" from the Actions menu.

| Filter | All Product Catalog | Search by product name... | ... |
|---|---------------------|---------------------------|---------------|
| <input checked="" type="checkbox"/> | Product Name | Type | Category Name |
| 0 records in this view. Select all records in the result set. | | | |
| | Aarons Widgets | In Stock | ▼ |
| | Aarons Widgets | In Stock | ▼ |
| | Marsden Widgets | In Stock | ▼ |

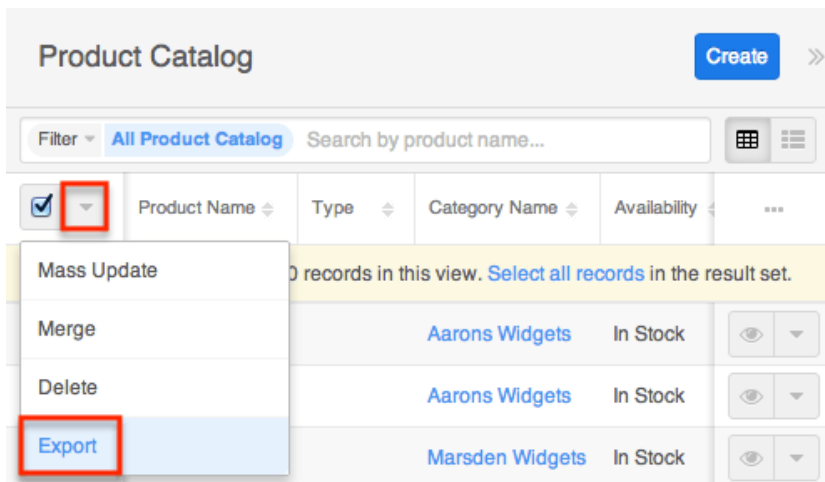
4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

You can also use the [Select All](#) feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to delete more than 1000 records or delete a specific group of records on the list view, please use the [filter option](#) in module search to perform the deletions 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 records at once from the Products list view. Users with administrator or developer level access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the [Studio](#) documentation in the Administration guide.

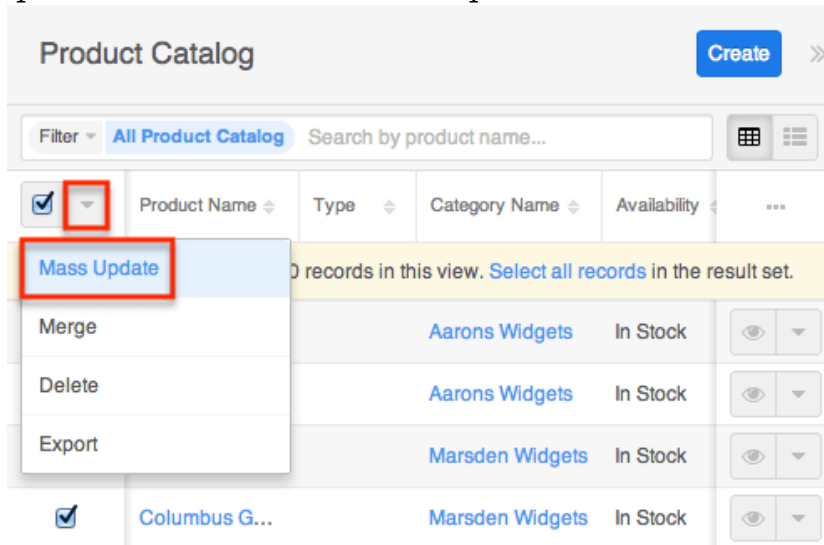
You can use the [Select All](#) feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to update more than 1000 records or update a specific group of records on the list view, please use the [filter option](#) in module search to perform the updates in smaller batches.

Please note that your ability to mass update products may be restricted by a role.

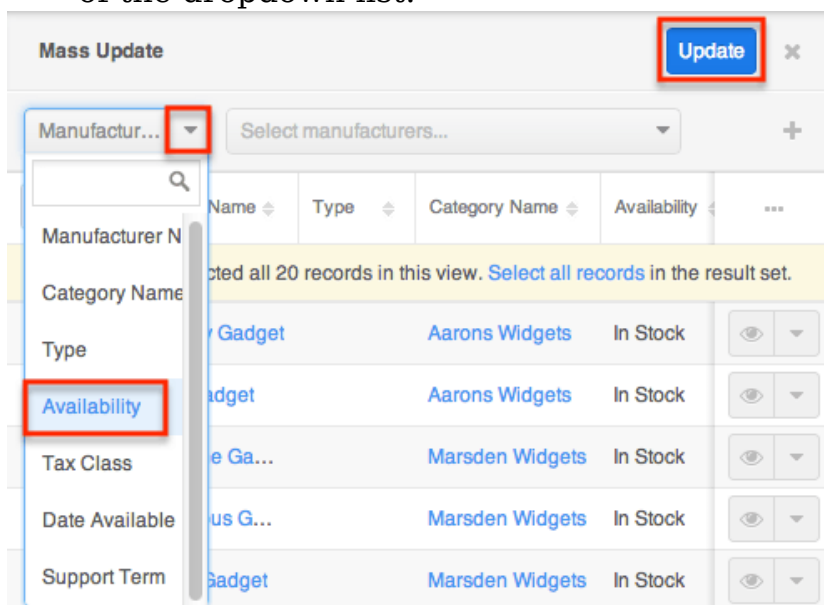
For more information on roles, please refer to the [Role Management](#) documentation. Check with the system administrator if you do not see the Mass Update option.

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 [Module Search](#) to identify products you wish to modify.
3. Select the desired products individually or using the [checkbox dropdown's](#) options then choose "Mass Update" from the Actions menu.



4. The Mass Update panel will appear below the search bar. Set values for the field(s) you wish to alter.
 - To add additional fields for mass update, click the Plus icon to the right of the dropdown list.



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

records.

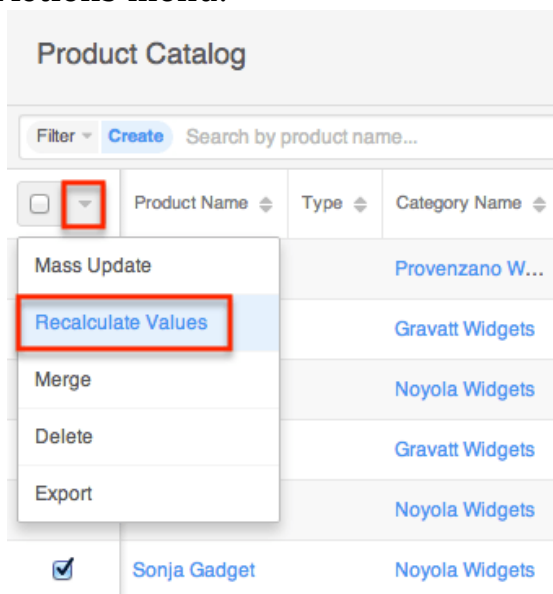
Recalculating Calculated Values

This feature allows calculated values to be recalculated following the addition or alteration of a calculated field in Studio. For more information on calculated fields, please refer to the [Studio](#) documentation in the Administration guide. Sugar allows you to select up to 1000 records at a time for recalculating values. If you desire to recalculate values for more than 1000 records, you will need to perform the recalculation in several batches.

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

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

1. Navigate to the Product Catalog list view by going to Admin > Product Catalog.
2. Use the list view's [Module Search](#) to identify products you wish to update.
3. Select the desired products then choose "Recalculate Values" from the Actions menu.



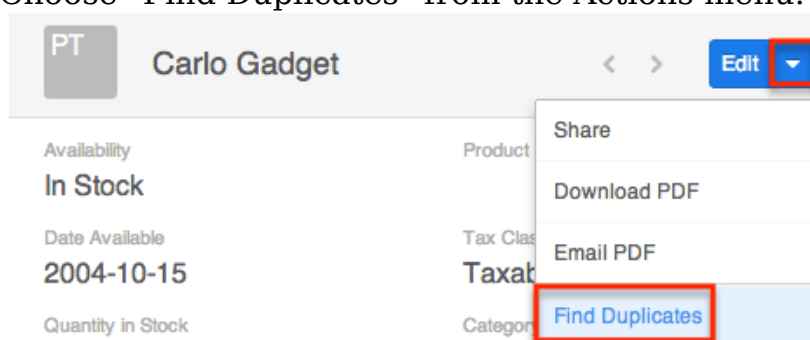
Finding Duplicate Products

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

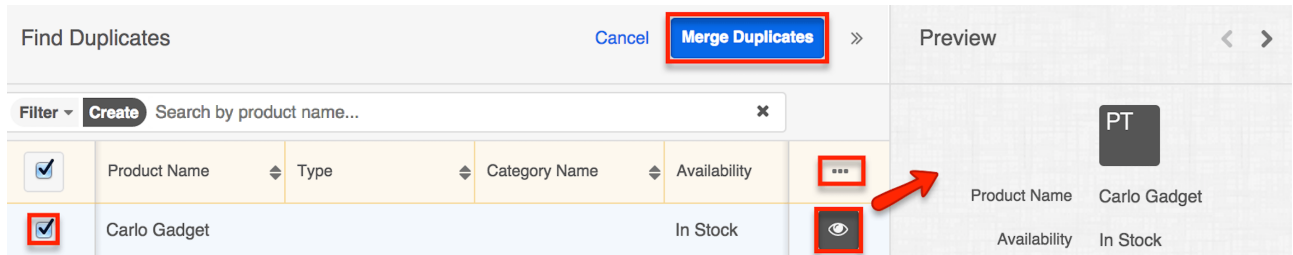
Please note that your ability to use the Find Duplicates action may be restricted by any role which prevents product deletion. For more information on roles, please refer to the [Role Management](#) documentation. Check with the system administrator if you do not see the Find Duplicates option.

Use the following steps to locate duplicate products using the Find Duplicates option from the Product Catalogs record view:

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



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



Once you click "Merge Duplicates", the merging process with the current record will begin. For instructions on performing the merge that follows, please refer to Steps 3-9 of the [Merging Via List View](#) section of this documentation.

Merging Products

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

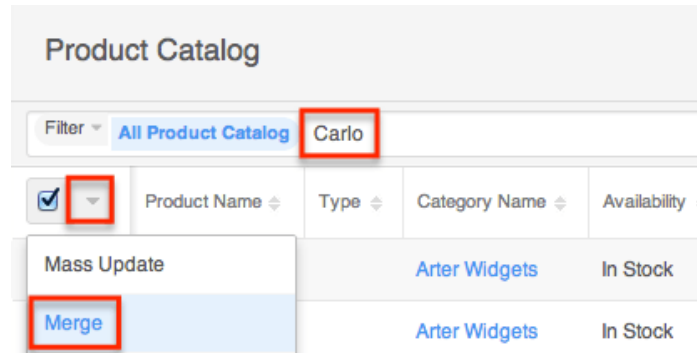
Note: Date Created, Date Modified, and Password field types are not supported when merging duplicate records in Sugar.

Merging Via List View

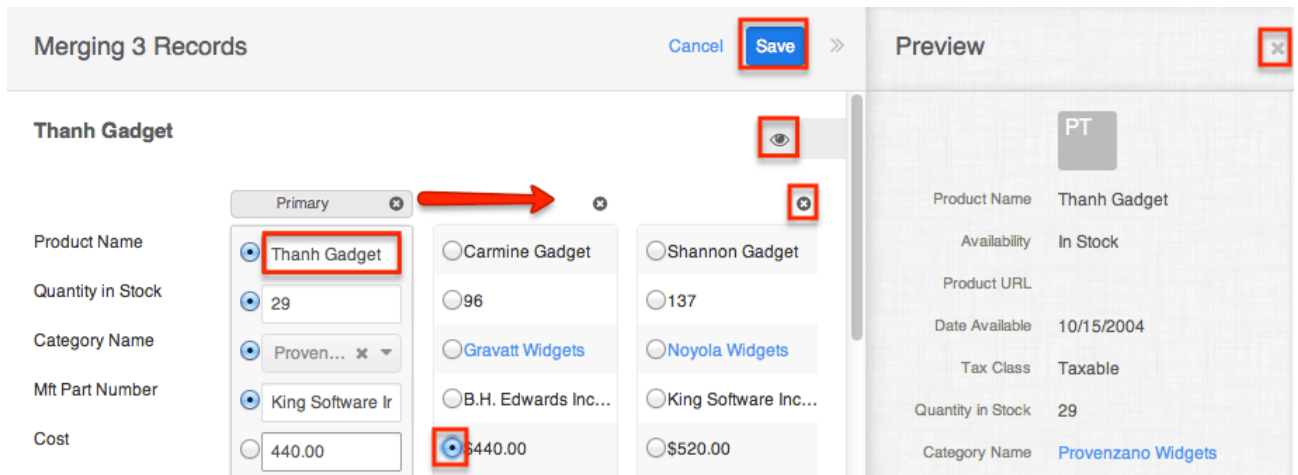
[Module Search](#) may be used to identify duplicate products by, for example, searching for records with similar names. Once your search has identified duplicate products, you can merge them directly from the Product Catalogs list view.

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

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



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



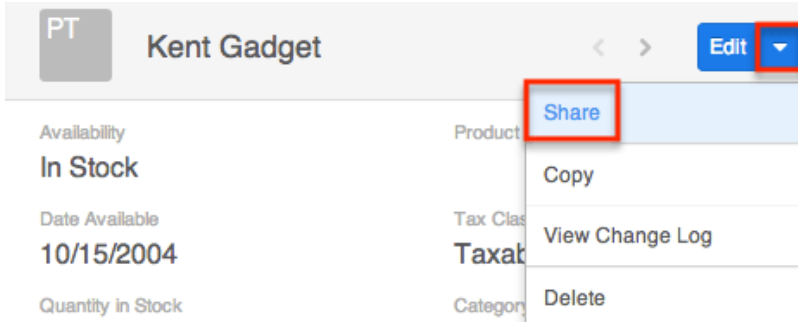
If 3 or more records are selected to be merged, an X icon will appear at the top right of each record. Clicking the "X" will remove the record from the merge process but will not delete the record.

4. To change which record is considered the primary, drag and drop the Primary label on the top of a different column.
5. Review the field values in each column and click the radio button to the left of the value that should appear on the final record. You can also manually type or select a new value for any field as necessary.
6. Preview what the final, merged record will contain as you work by clicking the eye icon to display the preview in the Intelligence Pane.
7. Click "Save" once all fields you wish to appear on the single, merged record have their radio buttons selected.
8. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Confirm" to proceed.

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

Sharing Products

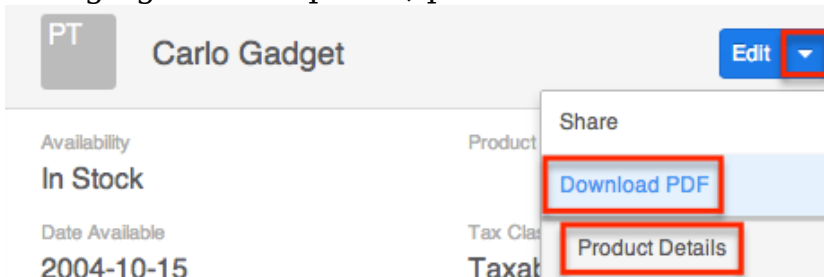
Individual Product Catalog records can be shared with other users in your organization by sending an email with the record's link directly from the record view. In the product catalog's record view, select "Share" from the Actions menu which will open a Compose Email window including the URL of the product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



Users can simply click the link in the email to access the product catalog record in Sugar. Please note that the user must be logged into Sugar in order to access the record. Users will only be able to view the shared record as allowed by their user access type and assigned roles. For more information on roles, please refer to the

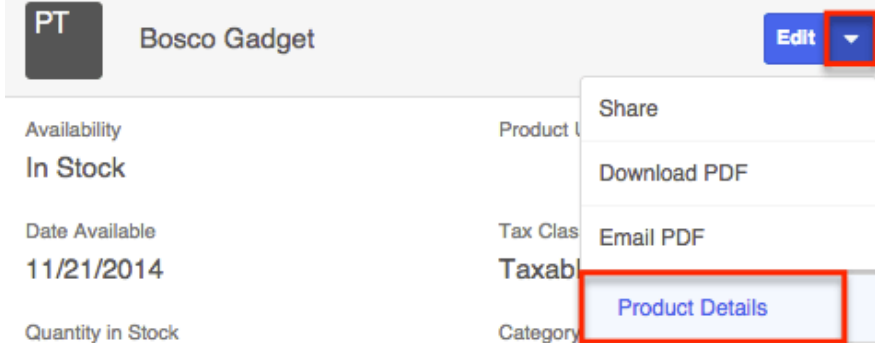
Downloading Product Information as a PDF

Users have the option to download product information as a PDF file via the Product Catalogs record view by clicking the Actions menu and selecting "Download PDF". All PDF templates which your administrator has created and made available for the module will appear beneath the Download PDF option in the Actions menu. Simply select one of the templates to generate the PDF file to view or save onto your local machine. Please note that the Download PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the [PDF Manager](#) documentation.

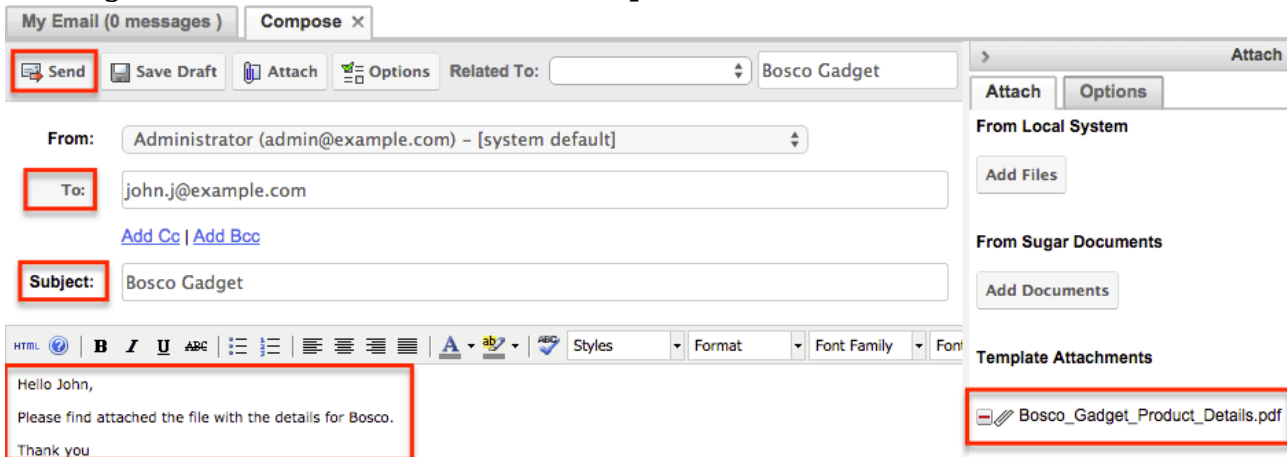


Emailing Product Information as a PDF

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



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

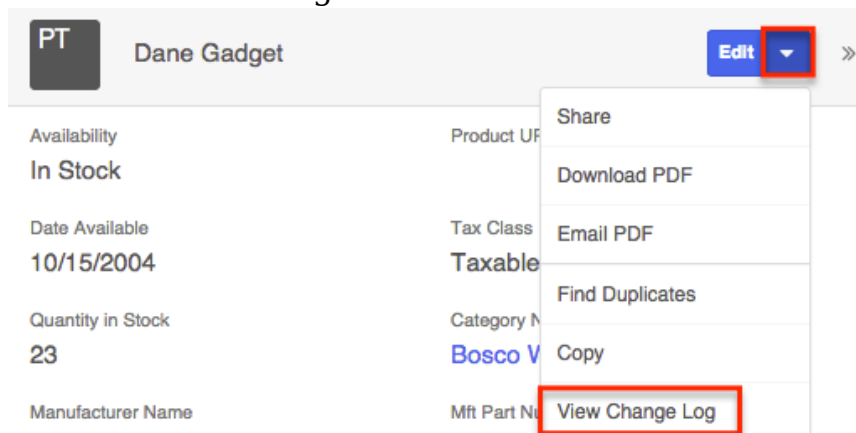


Please note that the Email PDF option will only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates,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

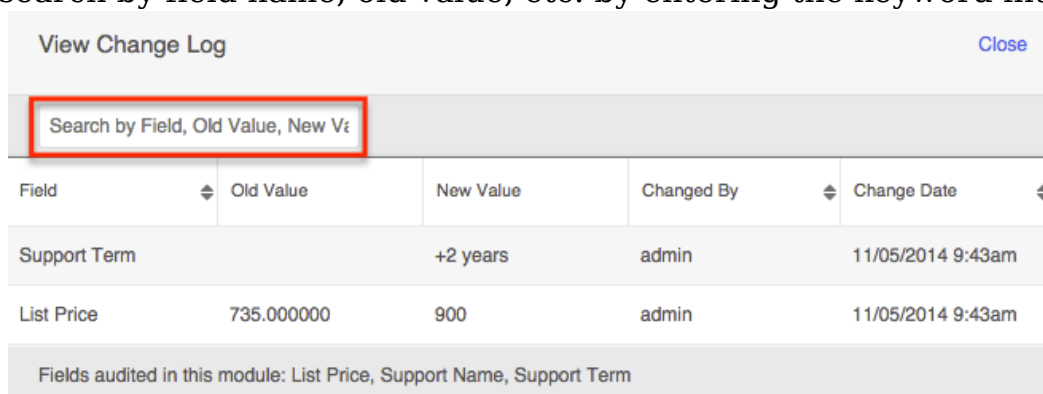
Viewing Product Change Logs

Changes made to each product catalog record are tracked over time, and users are able to view the history of changes via the change log in each product's record view. To view the change log, navigate to a product in record view and select

"View Change Log" from the Actions menu. Please note that only fields marked as "Audit" in Admin > Studio will be displayed in the change log. For more information on designating for audit, please refer to the [Studio](#) documentation in the Administration guide.



Once the change log opens, you can view the details of historical changes and can search by field name, old value, etc. by entering the keyword into the search box.



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

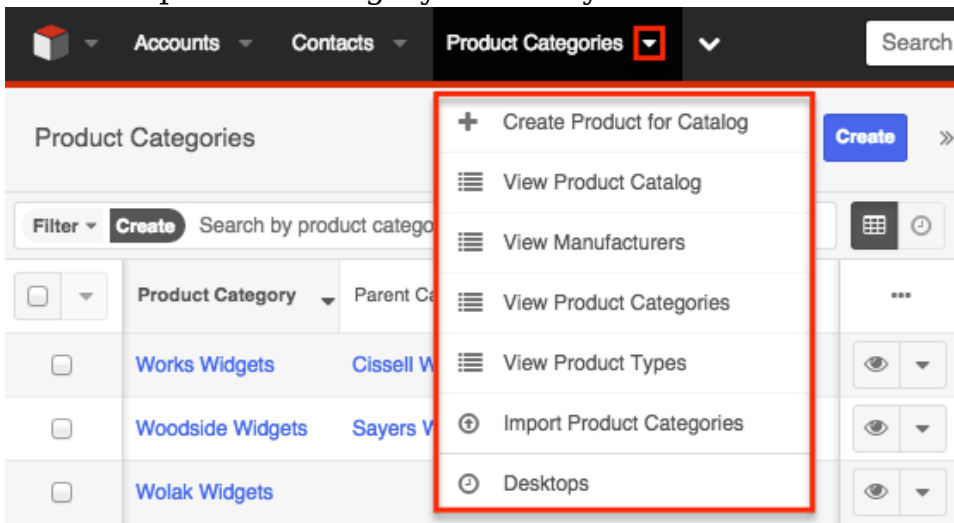
The Product Category module contains four stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields.

| 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 Categories Module Tab

The Product Categories module tab can be accessed by clicking the Product Categories option in the Admin page. Click the tab to access the Product Categories list view. You may also click the triangle in the Product Categories 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's record view to create a new product for the catalog |
| View Product Catalog | Opens the Product Catalog list view |
| View Manufacturers | Opens the Manufacturers list view |
| View Product Categories | Opens the Product Categories list view |
| 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

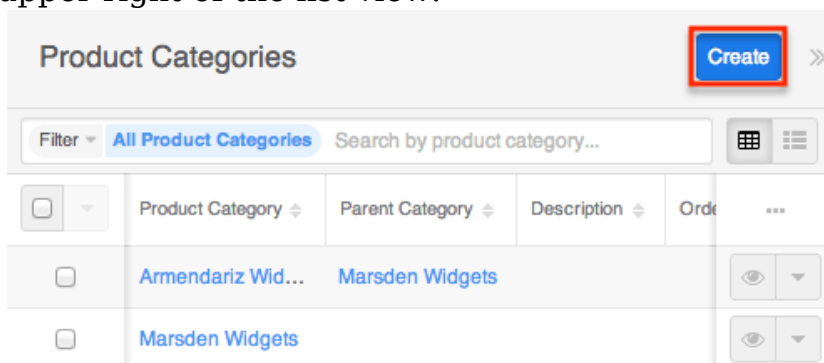
Product categories can be created either via the Product Categories module or by importing categories. When creating via the Product Categories module, the full record view layout opens and includes all of the relevant fields for your categories.

Creating Via Product Categories Module

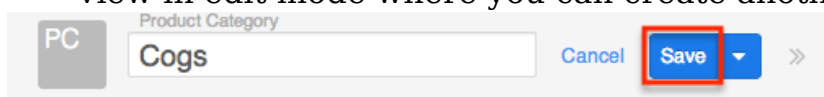
One of the most common methods of product category creation is via the Product Categories module using the Create button on the list view. This opens the record view layout which allows you to enter all of the relevant information for the product category.

Use the following steps to create a product category via the Product Categories module:

1. Navigate to Admin > Product Categories and click the Create button on the upper right of the list view.



2. Enter appropriate values for the [fields](#) in the record view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".
 - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.

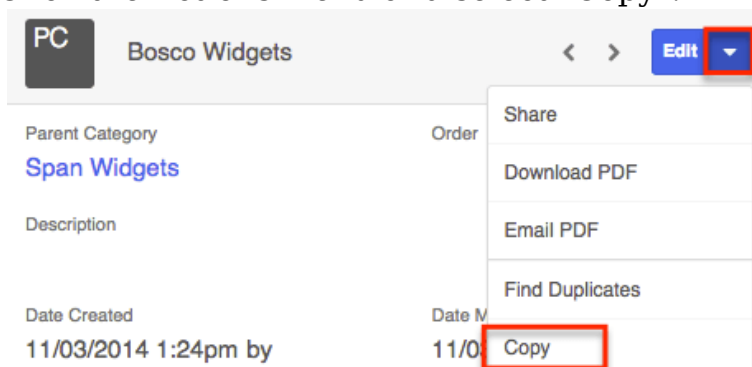


Creating Via Duplication

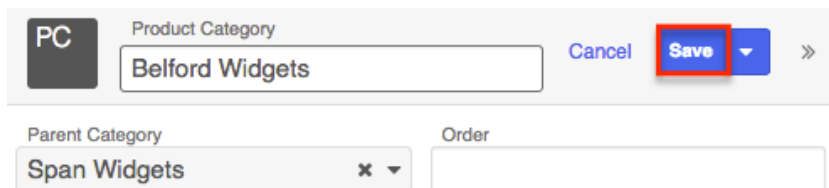
You can also create a new product category by duplicating an existing product category record. The Copy option is useful if the product category you are creating has similar information to an existing product category.

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

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



3. The displayed record view is pre-populated with the original product category's values. Update the necessary fields, then click "Save".
 - o Please note that you can also click the Actions Menu to the right of the Save button to select the "Save and view" or "Save and create new" options. Save and view will display the record's details after the save is complete. The Save and create new option saves the current record and opens a new, blank record view in edit mode where the user can create another record.

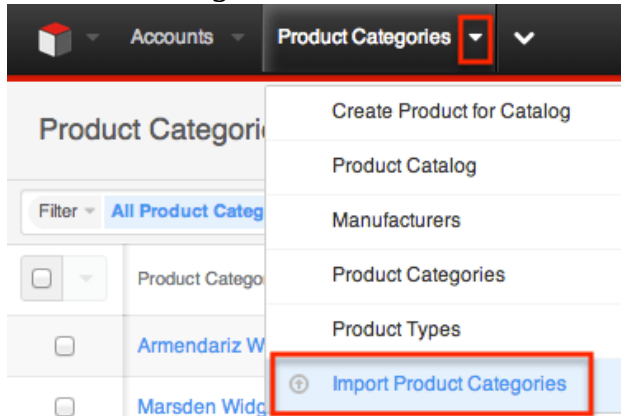


Importing Product Categories

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. Click the triangle in 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.
 - o The Created Records tab will show all of the new product categories.
 - o The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
 - o The Errors tab will show records that were not imported due to errors detected during import.

Viewing Product Categories

There are various options available for viewing product category records in Sugar including via Product Categories list view, Product Categories record view, Product Categories Recently Viewed menu, and reports.

Viewing Via List View

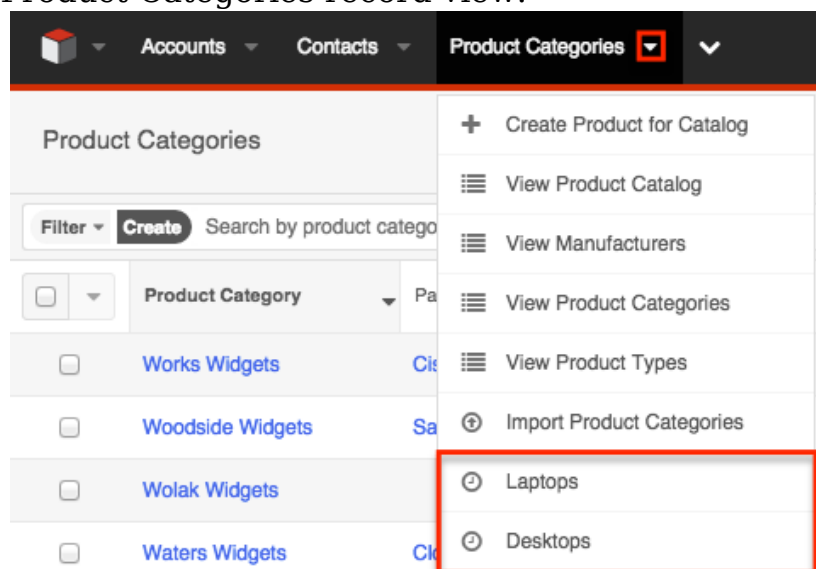
The Product Categories list view displays all product category records meeting the current search criteria. The Intelligence pane can also be viewed to the right of the Product Categories list view and allows users to view key record information for the specific record being previewed. For more information regarding the List View's Intelligence Pane, please refer to the [Intelligence Pane](#) section of this documentation. To access the list view, simply navigate to the Product Categories module via Admin > Product Categories. While list view shows key product category fields, you can click the product category's name to open the record view. For more information on viewing product categories via list view, please refer to the [Product Categories List View](#) section of this documentation.

Viewing Via Record View

The Product Categories record view displays thorough product category information including all relevant product category fields. The record view can be reached by clicking a product category's link from anywhere in the application including from the Product Categories list view. For more information on viewing product categories via the record view, please refer to the [Product Categories Record View](#) section of this documentation.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which product categories you have recently viewed. Click the Actions menu in the [Product Categories module tab](#) to see a list of your most recently viewed product categories, and click each name to open the Product Categories record view.



Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding product categories. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the product category record view by clicking the product category's name in the report results. Please note that you can only directly access record views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the [Reports](#) documentation.

| | |
|--|--------------------------------------|
| Name: Product Categories Report | Type: Rows and Columns Report |
| Modules: Product Categories | Teams: Global |
| Display Columns: Product Category, ID | Assigned to: Administrator |
| Schedule: None | |
| Filters: None | |

| (1 - 47 of 47) | |
|--------------------|--------------------------------------|
| Product Category | ID |
| Bevilacqua Widgets | 307bcbff-c9b5-3b00-55c5-5457f3dd6169 |
| Boes Widgets | 676c314b-234d-c44f-cc85-5457f3e71adb |

Searching Product Categories

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

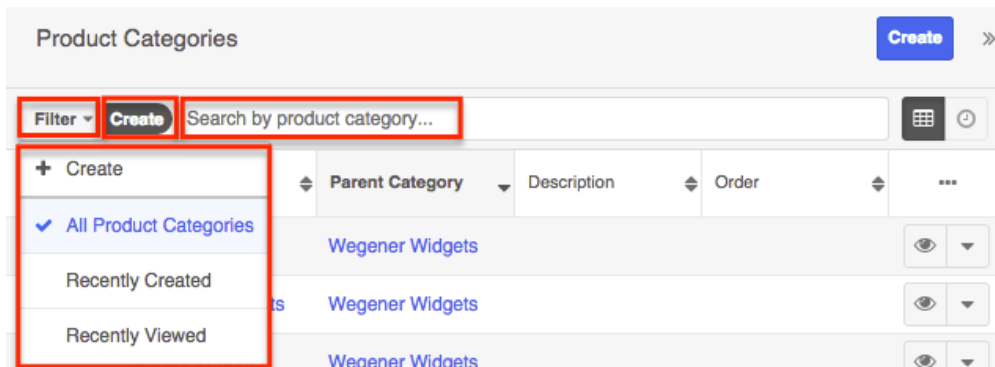
For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the [Search](#) documentation.

Module Search

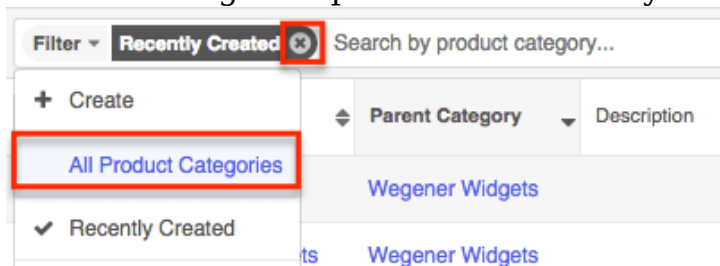
Module search enables users to easily search by product category name within the Product Categories module and pull up matching records in the list view. The search also provides a Filter option which can be used in combination with the open Search box to narrow your search further using the available options as follows:

- Create : Create a new custom filter which you can use to filter your search
 - Note: You can also click "Create" to the right of the Filter option.
- All Product Categories : Returns all records in the module to which you have access

- Recently Created : Returns only records you created in the module within the last 7 days
- Recently Viewed : Returns only records you have viewed in the module within the last 7 days



When you choose a filter, Sugar will return product categories which match both the selected filter and any name provided in the "Search by product category..." bar in the filtered list view results. For example, if you select "Recently Created" in the Filter options and enter a product category name, Sugar will only return records with a matching name that was created within the last 7 days. Once the search is complete, the relevant results will populate in the [list view](#) below the search bar. To see all product category records to which you have access, simply select the All Product Categories option in the filter and remove any text from the search bar. You can also click the Clear icon within the selected filter option (e.g. Recently Created) in the Search bar to clear the filter and pull up all list view search results. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.



Please note that you will only be able to see product category records as allowed by your user access type (Developer) and assigned roles. For more information on roles, please refer to the [Role Management](#) documentation.

Creating a Filter

You can also create new filters via the Create option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the

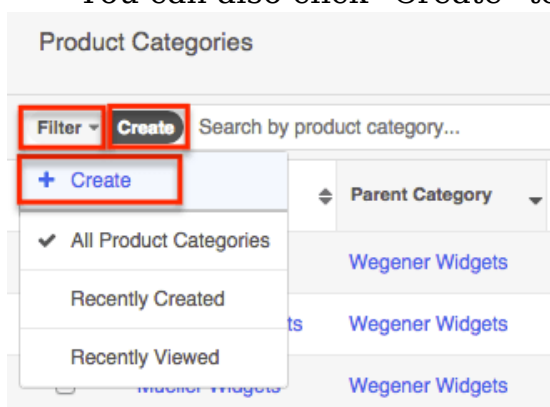
Product Categories list view. You have the option to add multiple fields to your new filter by clicking the Plus button to the right of the filter selection dropdown lists and set select operators along with their value(s). A filter's criteria need to be true for a record in order for it to appear in the list view search result. Additionally, filters with no specified values may be saved as a custom filter to act as a filter template when a user often searches using the same fields but with varying values.

Note: For users with Developer level access, only fields you have view access for will appear in the Filter list when creating a search filter.

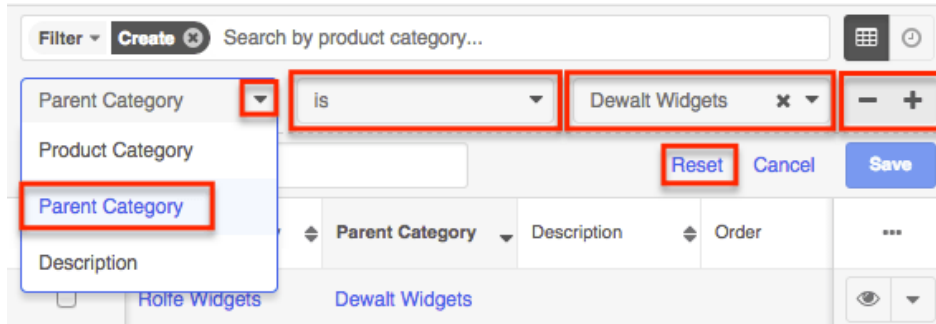
When you run a search using a created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.

The following steps cover creating a new Parent Category filter as an example:

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



2. Select the field you wish to add to your filter as well as the condition and matching criteria.
 - Note: For users with Developer level access, only fields you have view access for will be available to add in the Filter list.
3. To add additional fields to the new filter, click the Plus button to the right of the filter.
 - To remove fields from the new filter, click the Minus button to the right of the filter.
 - To clear any filter values (e.g. Will Westin), simply click the "x" to the right of the value or select "Reset" to the left of the Save button.



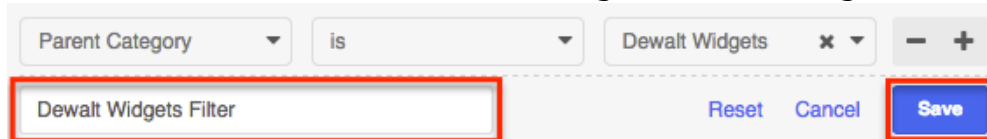
The list view will automatically display results matching your filters as you create and modify the criteria.

Saving a Filter

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

The following steps cover saving a new search by Name filter as an example:

1. Create a [new filter](#) to perform a search on your desired fields.
2. Enter in a name for the new filter (e.g. "Dewalt Widgets Filter").



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

Global Search

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



To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character.

Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. For more information on using and configuring Global Search, please refer to the [Global Search](#) section of the Search documentation.

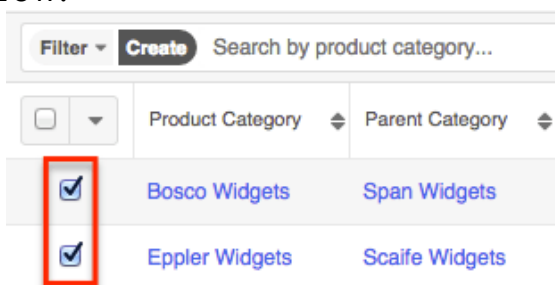
Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the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

Product Categories List View

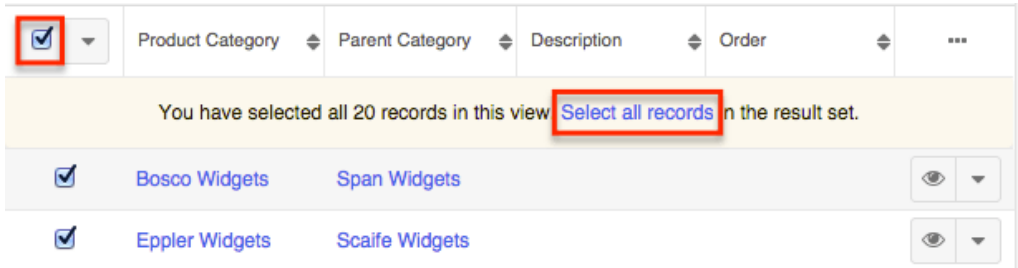
The Product Categories list view displays all product category records. You can view the basic details of each product category within the field columns. You can also click on a category's name to [edit](#) it, or [delete](#) the category by clicking the "Delete" button at the end of the row.

Checkbox Selection

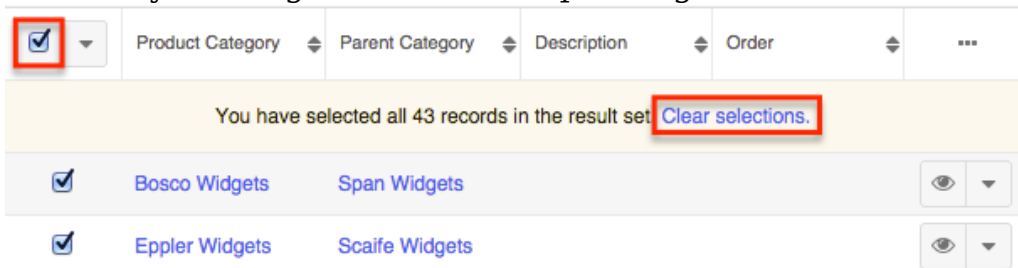
You can perform several actions on product category records directly from the list view by first selecting the desired records. To select individual product category records on the Product Categories list view, mark the checkbox on the left of each row.



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

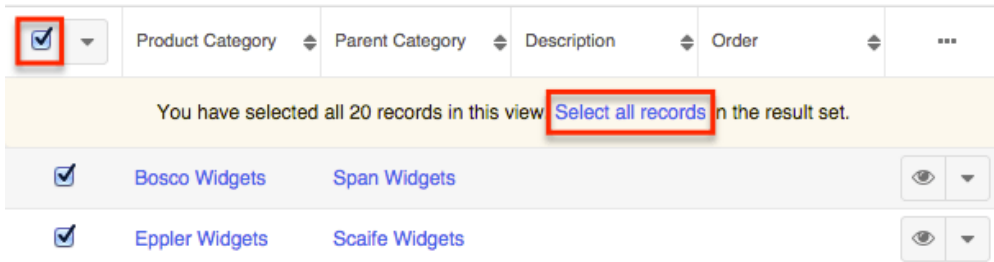


If you wish to clear the selection for all records on the list view result set, simply click "Clear selections" in the dialog. You can also clear the selections for all records by clicking the checkbox option again to remove the check marks.

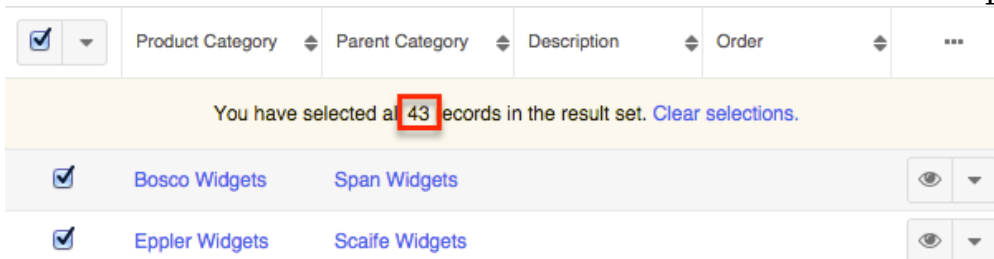


Total Record Count

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

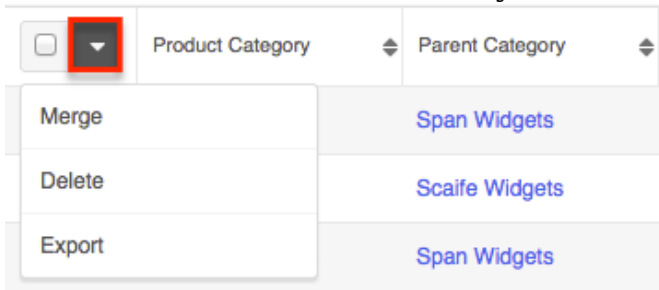


The total count of all records on the list view result set will appear in the dialog.



Mass Actions Menu

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

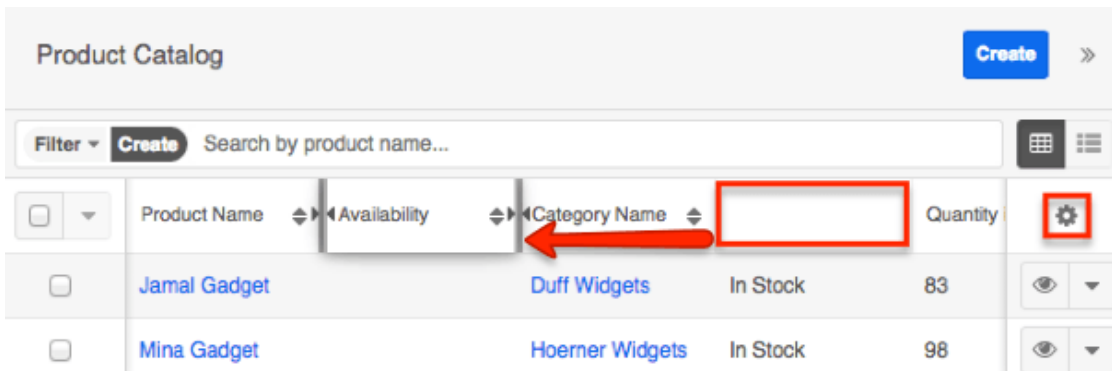


The options in the Mass Actions menu allow you to perform the following operations:

| Menu Item | Description |
|------------------------|---|
| Merge | Merge two or more duplicate product categories |
| Delete | Delete one or more product categories at a time |
| Export | Export one or more product categories to a CSV file |

Column Reordering

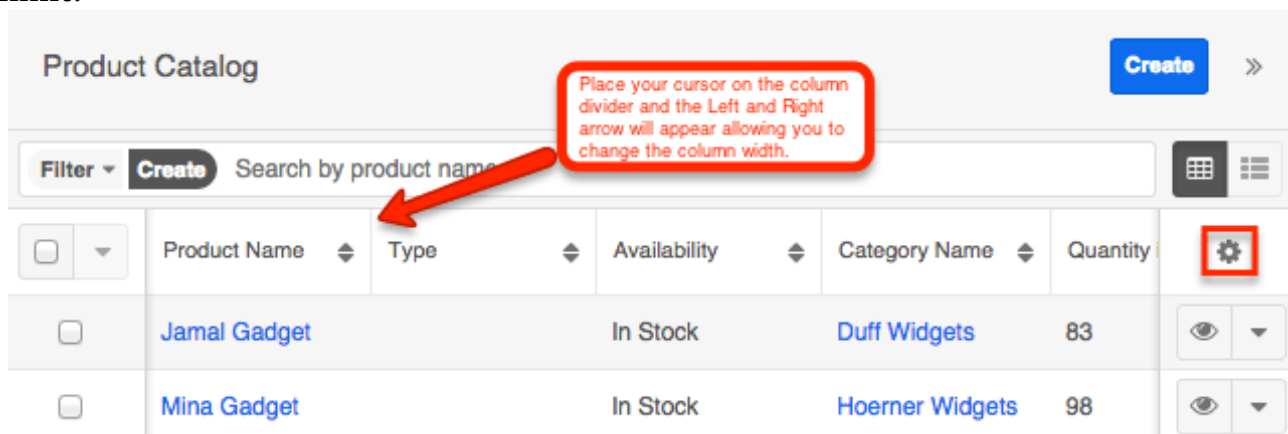
List view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order will remain for a user upon subsequent visits to the module until the user's browser cache is cleared. You can reset the column order back to the default view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



Column Resizing

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

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

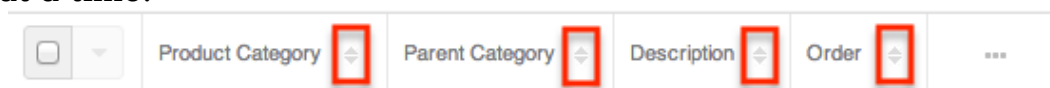


The screenshot shows the 'Product Catalog' list view. At the top right is a 'Create' button. Below it is a search bar with 'Filter' and 'Create' buttons, and the text 'Search by product name'. The table has columns: Product Name, Type, Availability, Category Name, and Quantity. A red callout box with a red arrow pointing to the divider between 'Product Name' and 'Type' contains the text: 'Place your cursor on the column divider and the Left and Right arrow will appear allowing you to change the column width.' A gear icon in the top right of the table header is also highlighted with a red box.

| <input type="checkbox"/> | Product Name | Type | Availability | Category Name | Quantity | <input type="checkbox"/> |
|--------------------------|--------------|------|--------------|-----------------|----------|--------------------------|
| <input type="checkbox"/> | Jamal Gadget | | In Stock | Duff Widgets | 83 | <input type="checkbox"/> |
| <input type="checkbox"/> | Mina Gadget | | In Stock | Hoerner Widgets | 98 | <input type="checkbox"/> |

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. Please note the list view may be sorted by only one column at a time.

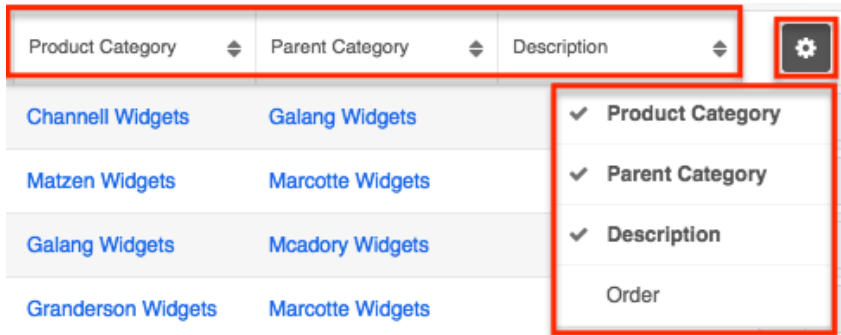


The screenshot shows the 'Product Category' list view. The table has columns: Product Category, Parent Category, Description, and Order. Each of these four column headers has a red box highlighting a pair of small arrows (up and down) indicating that these columns are sortable.

| <input type="checkbox"/> | Product Category | Parent Category | Description | Order | ... |
|--------------------------|------------------|-----------------|-------------|-------|-----|
|--------------------------|------------------|-----------------|-------------|-------|-----|

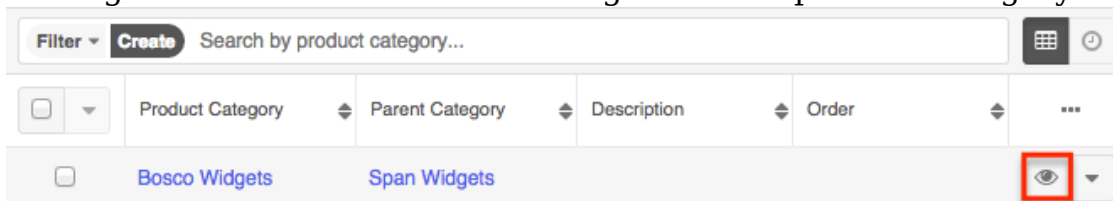
Column Selection

Sugar gives users the ability to personalize the list view by specifying which fields they want to be displayed in the list view. You can click the Column Selection icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column on your list view.

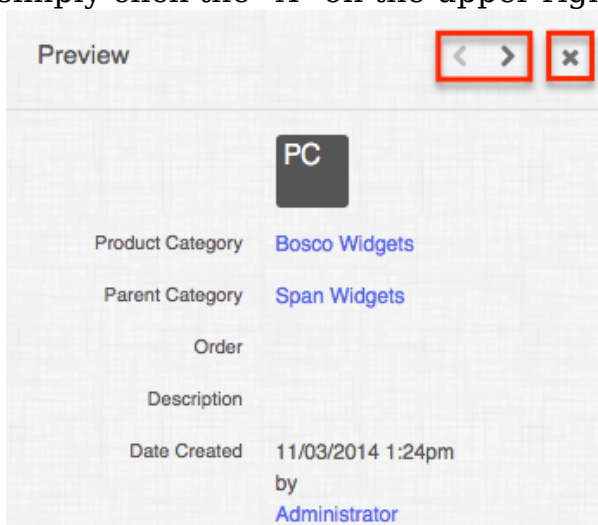


Preview

Users can view a record's details directly from the Product Categories list view by clicking the Preview icon to the far right of each product category's row.

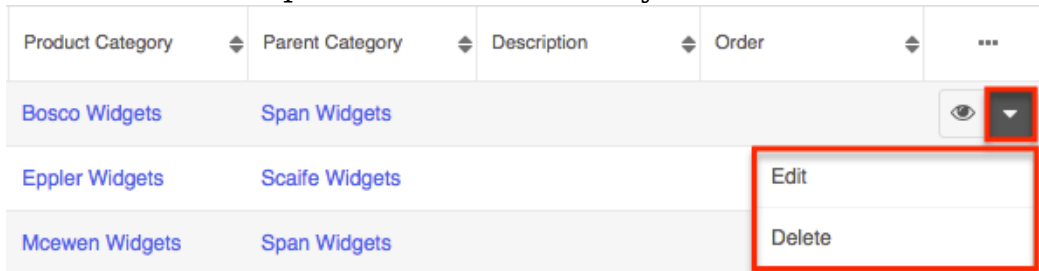


The record's data will display to the right of the list view providing key information regarding the record. On the upper right of the intelligence pane, there is a Left and Right arrow button that allows you to scroll through the list view's current search results by previewing the next or previous record. To close the preview, simply click the "X" on the upper right of the intelligence pane.



Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to edit or delete specific records directly from the list view.

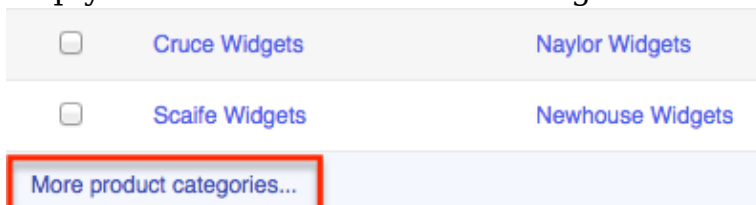


The options in the Record Actions menu allow you to perform the following operations:

| Menu Item | Description |
|------------------------|------------------------------|
| Edit | Edit this product category |
| Delete | Delete this product category |

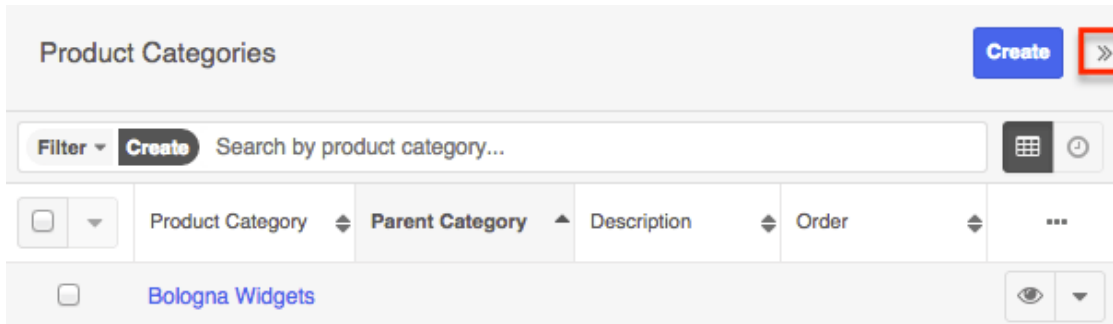
More Product Categories

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



Right Hand Side Drawer

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



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 selecting a product category to relate to a product catalog. Simply enter in a order number for the product category, with 1 being the highest on the list and moving down as the order number increases.

Intelligence Pane

An intelligence pane displays to the right of the Product Categories list view and can provide users with valuable information via various dashlets. The Help dashboard normally displays by default along with the List View Help dashlet and Learning Resources dashlet. The List View Help dashlet provides users with a brief introduction to the module along with a link (e.g. Product Categories documentation) to the corresponding documentation in the Administration guide. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation & Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the [Intelligence Pane](#) documentation. Users may create other dashboards (e.g. My Dashboard) for use with the Product Categories module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets to their dashboards.

Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do not wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Product Categories module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the [Intelligence Pane](#) documentation.

The screenshot shows the 'Product Categories' list view. The main table has columns for 'Product Category', 'Parent Category', and 'Description'. The right sidebar contains a 'Help Dashboard' with a 'Create' button highlighted in red. Below the help dashboard are sections for 'List View Help' and 'Learning Resources'.

| Product Category | Parent Category | Description |
|-------------------|-----------------|-------------|
| Maya Widgets | Wynter Widgets | |
| Monaghan Widgets | Wynter Widgets | |
| Settle Widgets | Wynter Widgets | |
| Corbitt Widgets | Wommack Widgets | |
| Benedict Widgets | Wommack Widgets | |
| Stelzer Widgets | Wommack Widgets | |
| Mckown Widgets | Spady Widgets | |
| Rivenburg Widgets | Spady Widgets | |
| Leo Widgets | Spady Widgets | |
| Mizer Widgets | Pitt Widgets | |
| Spady Widgets | Pitt Widgets | |
| Ivie Widgets | Pitt Widgets | |
| Holleman Widgets | Nesmith Widgets | |

Product Categories Record View

The Product Categories record view displays product category information including all relevant fields. The record view can be reached by clicking a product category's link from the Product Categories list view.

Actions Menu

The Actions menu on the top right of each product category's record view allows you to perform various actions on the current record.

The screenshot shows the record view for 'Darby Widgets'. The record details include 'Parent Category: Dewalt Widgets', 'Date Created: 11/03/2014 1:24pm by Administrator', and 'Date Modified: 11/03/2014'. The 'Edit' button is highlighted in red, and a dropdown menu is open showing various actions.

| Parent Category | Order |
|-----------------|-------|
| Dewalt Widgets | |

Date Created: 11/03/2014 1:24pm by Administrator
Date Modified: 11/03/2014

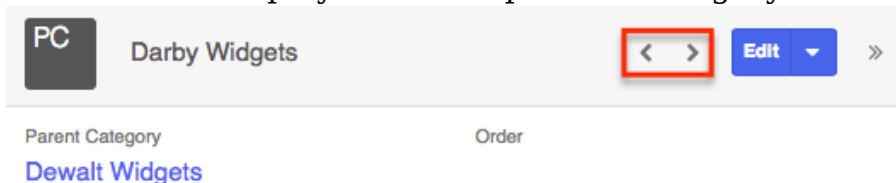
- Share
- Download PDF
- Email PDF
- Find Duplicates
- Copy
- View Change Log
- Delete

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

| Menu Item | Description |
|---------------------------------|--|
| Edit | Edit this product category |
| Share | Share a link to this product category |
| Download PDF | Download product category information as a PDF file |
| Email PDF | Email product category information as a PDF attachment |
| Find Duplicates | Locate potential duplicates of this product category |
| Copy | Duplicate this product category |
| View Change Log | View a record of changes to this product category |
| Delete | Delete this product category |

Next or Previous Record

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



Intelligence Pane

An intelligence pane displays to the right of the product category's record view and can provide users with valuable information via various dashlets. The Help dashboard normally displays by default along with the Record View Help dashlet and Learning Resources dashlet. The Record View Help dashlet provides users with a brief introduction to the module along with some instructions to help users utilize and navigate around the record view. A link to the corresponding documentation (e.g. Product Categories documentation) in the Administration guide is also provided within the Help dashlet. The Learning Resources dashlet includes links to Sugar University, Community Forums, and Documentation &

Support, which provide access to additional resources. Simply click the appropriate link to be directed to the specific page in a separate tab. For more information regarding the Help dashboard, please refer to the [Intelligence Pane](#) documentation. Users may create other dashboards (e.g. My Dashboard) for use with the Product Categories module by clicking the Create button. Selecting "Edit" from the Actions menu on the upper right will allow them to make changes and add additional dashlets to their dashboards.

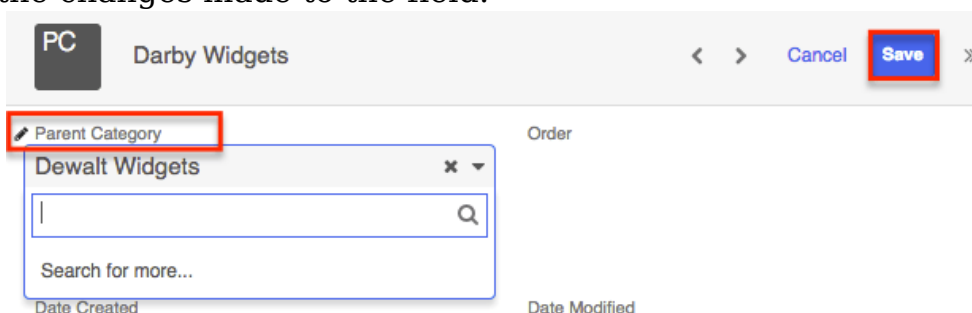
Users can edit individual dashlets by clicking the Gear icon on the upper right of each dashlet. Dashlets may also be dragged and dropped to rearrange them within the current dashboard. You can collapse dashlets you do not wish to view by clicking the Up arrow on the upper right of the dashlet. Sugar will remember the state of your intelligence pane the next time you return to the Product Categories module. For more information on editing, creating, and rearranging dashboards and dashlets, please refer to the [Intelligence Pane](#) documentation.

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 record view. The record view is available within the Product Categories module and includes all of the Product Category fields you should need.

Editing Inline Via Record View

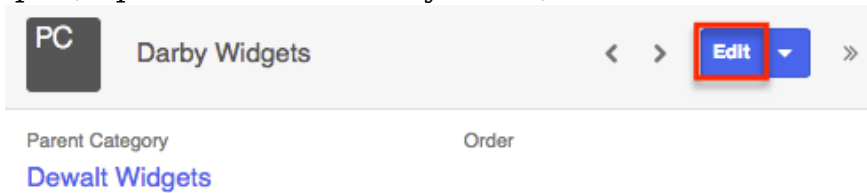
Users can edit individual fields on the Product Categories [record view](#) without entering the full edit mode by clicking the field name. Fields which are available for inline editing will display a pencil icon when hovering on the field name or value. This will allow users to type or select a new value. Click "Save" to preserve the changes made to the field.



Editing Via Record View

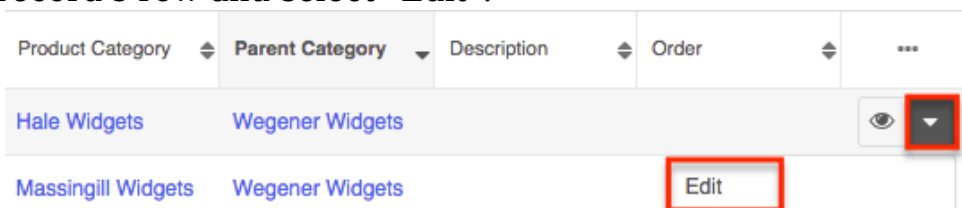
You can edit many product category fields at once via the [record view](#) by clicking the Edit button on the upper right of the page. Once the record view layout is

open, update the necessary fields, then click "Save" to preserve the changes made.

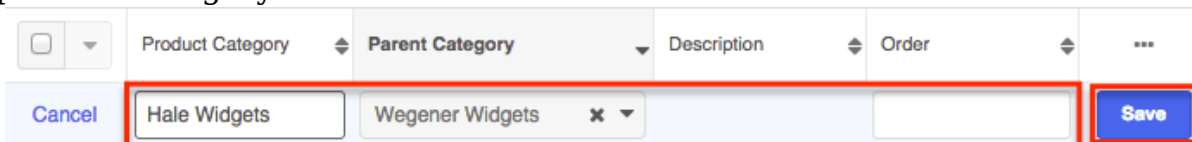


Editing Inline Via List View

You can also edit individual fields on the Product Categories list view without entering the full edit mode. Click the Record Actions menu to the far right of the record's row and select "Edit".



The fields on the record's row will open up allowing user's to type or select a new value. You can click the [double arrow](#) icon on the upper right of the page to expand the list view for editing. Click "Save" to preserve the changes made to the product category record.



Note: Text area fields are not inline editable from list views.

Deleting Product Categories

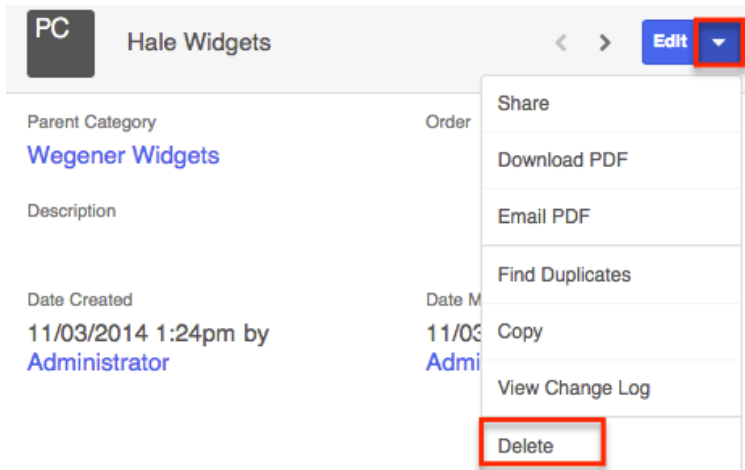
If a product category is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from the Product Categories record view or list view. Deleting via the record view allows you to delete a single record while the list view allows for mass deleting multiple records at once as well as single record deletions.

Deleting Via Record View

Use the following steps to delete a product category record via the record view:

1. Navigate to a product category's record view.

2. Select "Delete" from the Actions menu.

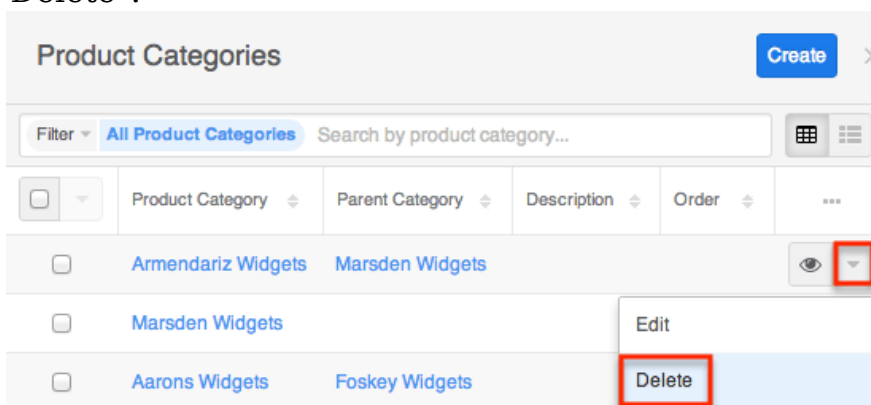


3. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

Deleting Via List View

Use the following steps to delete a product category via the list view:

1. Navigate to the Product Categories list view via Admin > Product Categories.
2. Use the [Module Search](#) to find the product category record you wish to delete.
3. Click the Record Actions menu to the far right of the record's row and select "Delete".

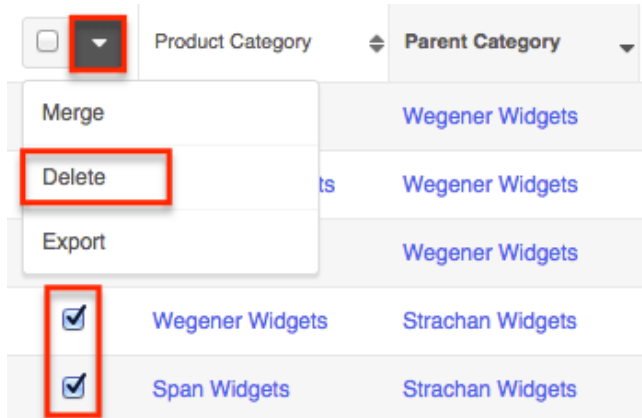


4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

Mass Deleting Via List View

Use the following steps to delete one or more product category records via the list view:

-
1. Navigate to the Product Categories list view via Admin > Product Categories.
 2. Use the [Module Search](#) to find the Product Category records you wish to delete.
 3. Select the desired product category records then choose "Delete" from the Actions menu.



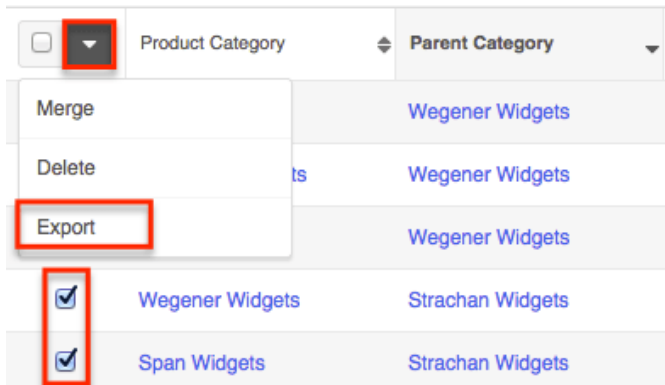
4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

You can also use the [Select All](#) feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to delete more than 1000 records or delete a specific group of records on the list view, please use the [Module Search](#) in module search to perform the deletions in smaller batches.

Exporting Product Categories

Sugar's Export option allows users to download all fields for the selected product categories to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Product Category data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered product categories back into Sugar. For more information on updating existing records via import, please refer to the [Import](#) documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

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



Please note that your ability to export product categories from Sugar may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation. Check with the system administrator if you do not see the Export option.

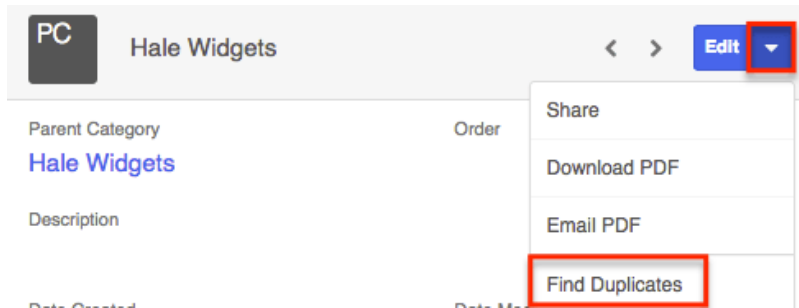
Finding Duplicate Product Categories

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

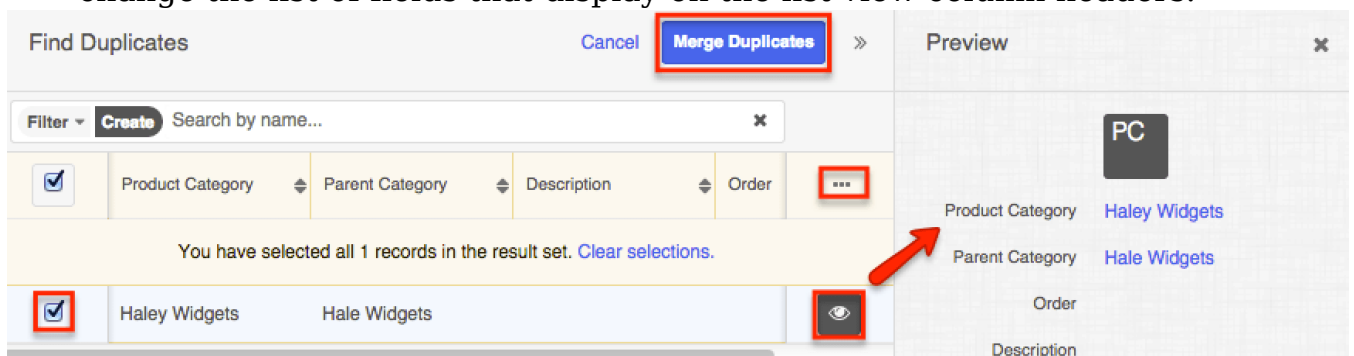
Please note that your ability to use the Find Duplicates action may be restricted by any role which prevents record deletion. For more information on roles, please refer to the [Role Management](#) documentation. Check with the system administrator if you do not see the Find Duplicates option.

Use the following steps to locate duplicate product categories using the Find Duplicates option from the Product Categories record view:

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



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



Once you click "Merge Duplicates", the merging process with the current record will begin. For instructions on performing the merge that follows, please refer to Steps 3-9 of the [Merging Via List View](#) section of this documentation.

Merging Product Categories

When duplicate records are identified in Sugar, you have the option to merge two or more product categories into a single record. Once the merge is complete, the duplicate product category record(s) will be deleted, and the primary record will remain. Currently, Date Created and Date Modified field types are not supported when merging duplicate records in Sugar.

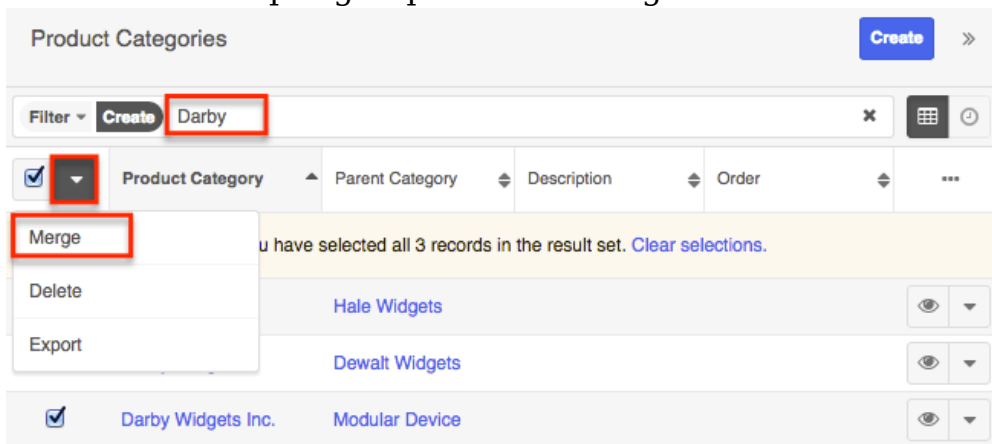
Merging Via List View

[Module Search](#) may be used to identify duplicate product categories by, for

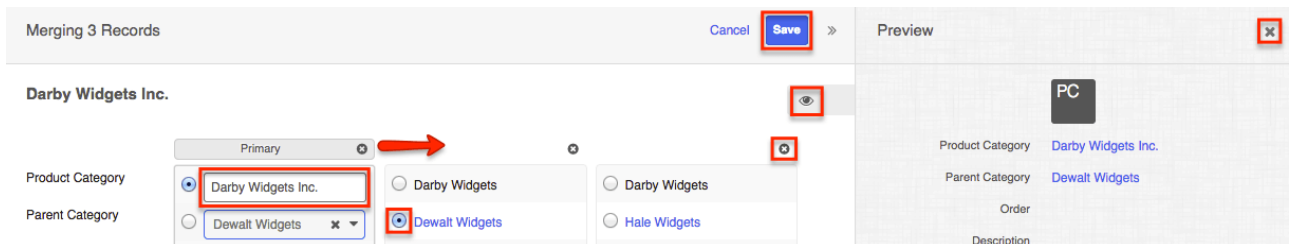
example, searching for records with similar names. Once your search has identified duplicate records, you can merge them directly from the Product Categories list view.

Use the following steps to merge product categories via the list view:

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



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



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

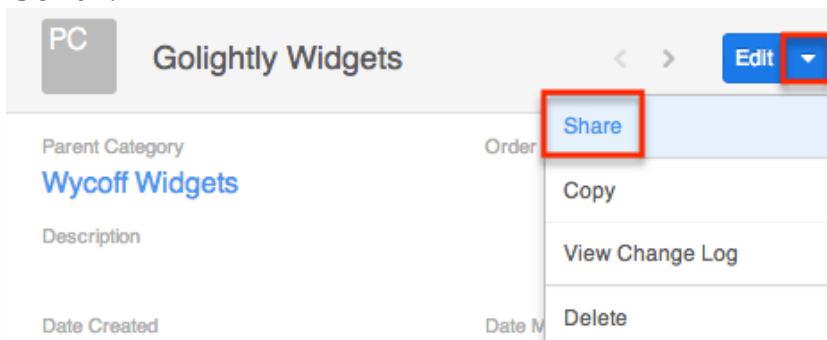
4. To change which record is considered the primary, drag and drop the Primary label on the top of a different column.
5. Review the field values in each column and click the radio button to the left of the value that should appear on the final record. You can also manually type or select a new value for any field as necessary.

-
- Note: Fields you do not have Edit access for cannot be edited on the merging records page.
6. Preview what the final, merged record will contain as you work by clicking the eye icon to display the preview in the Intelligence Pane.
 7. Click "Save" once all fields you wish to appear on the single, merged record have their radio buttons selected.
 8. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Confirm" to proceed.

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

Sharing Product Categories

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

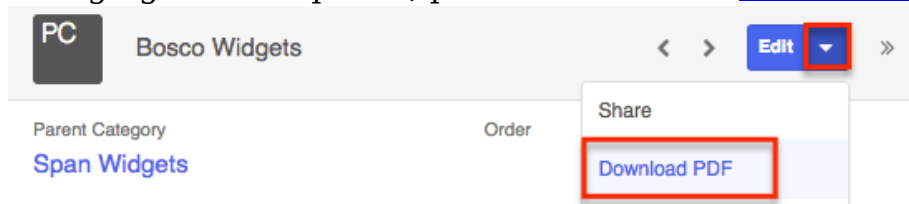


Users can simply click the link in the email to access the product category record in Sugar. Please note that the user must be logged into Sugar in order to access the record. Users will only be able to view the shared record as allowed by their user access type and assigned roles. For more information on roles, please refer to the [Role Management](#) documentation.

Downloading Product Category Information as a PDF

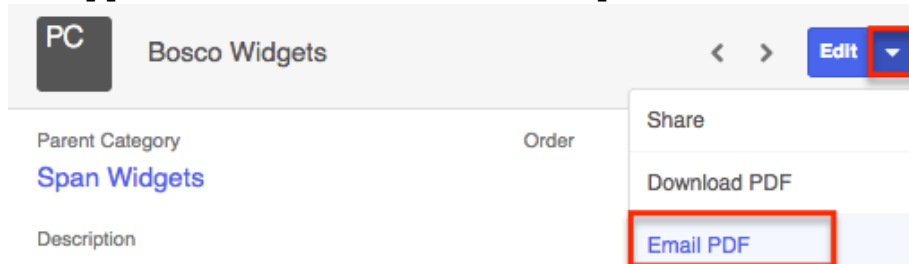
Users have the option to download product category information as a PDF file via the Product Categories record view by clicking the Actions menu and selecting "Download PDF". All PDF templates which the administrator has created and made available for the module will appear beneath the Download PDF option in the Actions menu. Simply select one of the templates to generate the PDF file to view or save onto your local machine. Please note that the Download PDF option will

only appear in the Actions menu if there is an existing PDF template available for the module. Users with administrator or developer access can create and manage PDF templates via Admin > PDF Manager. For more information on creating and managing PDF templates, please refer to the [PDF Manager](#) documentation.

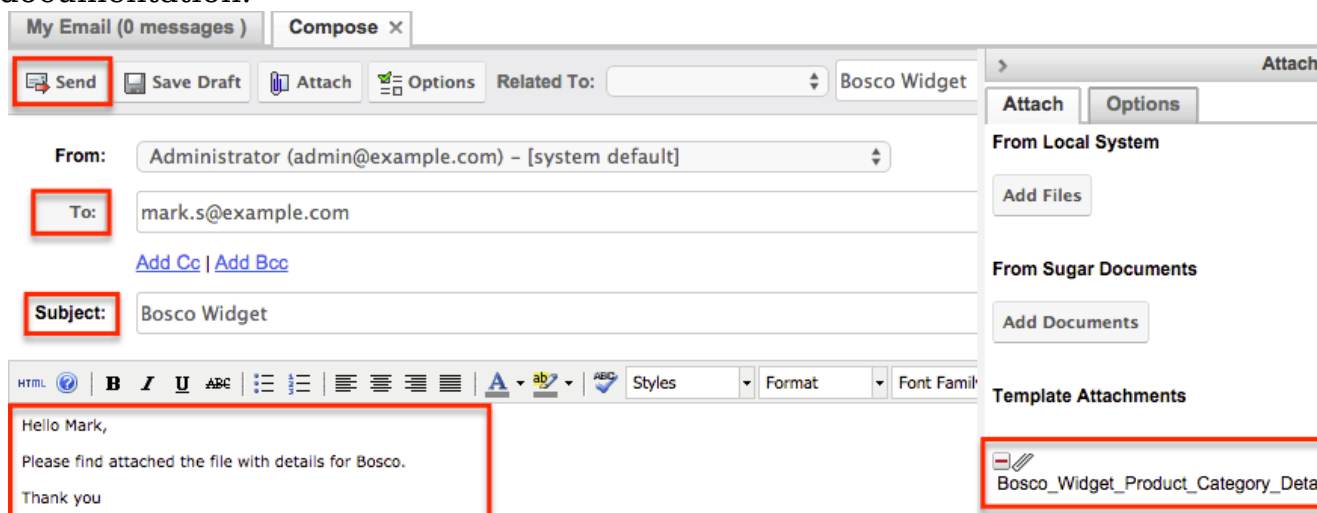


Emailing Product Category Information as a PDF

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



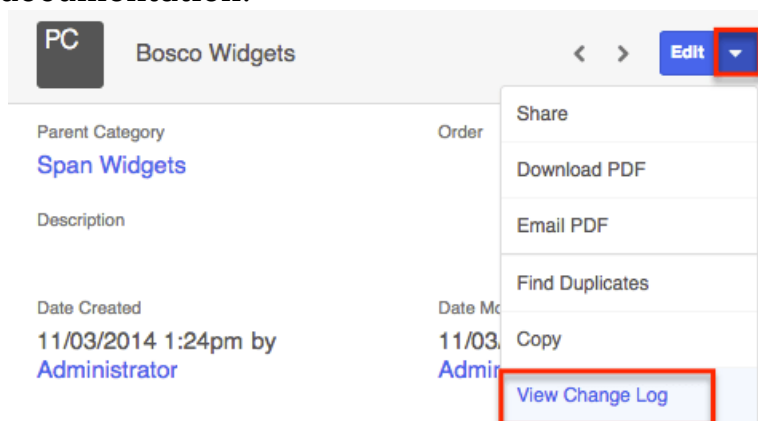
Select one of the templates to open a Compose window in the Emails module. Enter an email address in the To field and the Subject field will display the product category's name. The email is automatically related to the product category record and the chosen product category PDF will be attached. You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



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

Viewing Product Category Change Logs

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



Once the change log opens, you can view the details of historical changes and can search by field name, old value, etc. by entering the keyword into the search box.

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.

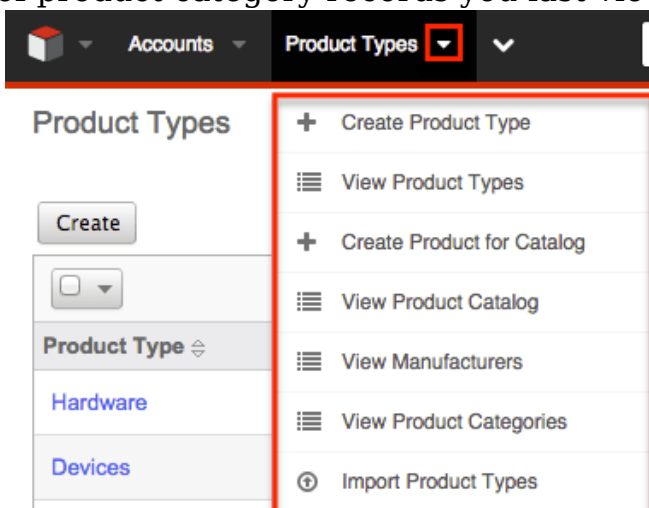
Product Type Fields

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 Click the triangle in the Product Types 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 Type | Opens the Product Types list view to create a product |
| View Product Types | Opens the Product Types list view |
| 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 |
| View Manufacturers | Opens the Manufacturers list view |

| | |
|---|---|
| View Product Categories | Opens the Product Categories list view |
| Import Product Types | Opens the import wizard to create or update product types using external data |

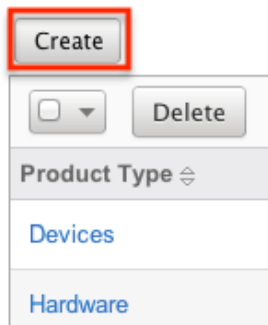
Creating Product Types

Product types can be created either via the Product Types module or importing product types. When creating via the Product Types module, the full edit view layout opens below the Product Types list view and includes all of the relevant fields for your product type.

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:

Save Save & Create New

Product Type: * Support Contract

Description: For customers purchasing support

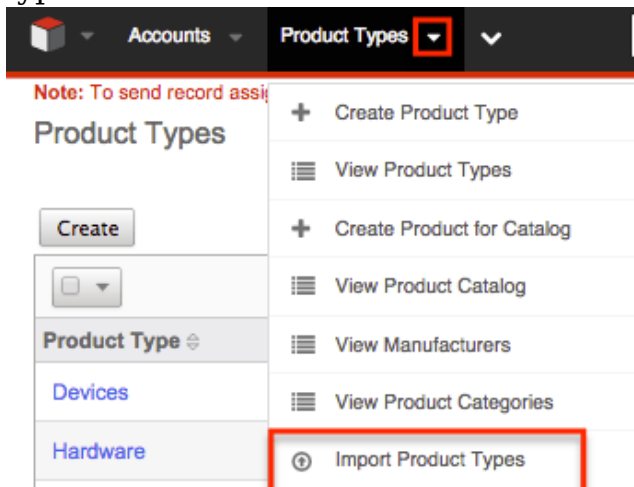
Order: * 4 *Set the order in which this type will appear in the Product Type dropdown lists*

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. Click the triangle in 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..
 - o The Created Records tab will show all of the new product types.
 - o The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
 - o 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. Please note 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 Types may be edited at any time to update or add information to the record. You can make changes to existing product type records via the Product Type edit view. Edit view is available within the Product Types module, below the list view, and includes all of the relevant fields you should need.

| | | |
|----------------------------|--------|----------------------|
| Support Contract | 3 | Delete |
| <input type="checkbox"/> ▼ | Delete | ⏪ ⏩ (1 - 3 of 3) ⏪ ⏩ |

Product Type: Support Contract

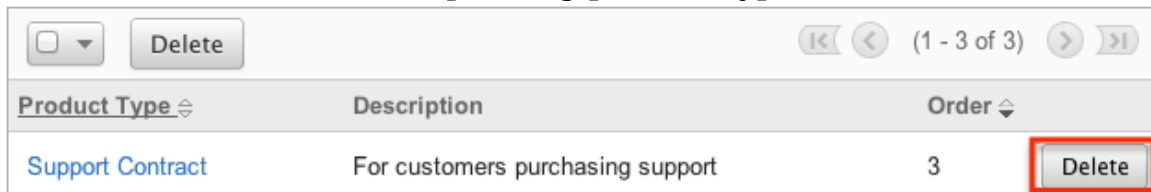
| | |
|-----------------|---|
| Save | Save & Create New |
| Product Type: * | <input type="text" value="Support Contract"/> |
| Description: | <input type="text"/> |
| Order: * | <input type="text" value="3"/> <i>Set the order in which this type will appear in the Product Type dropdown lists</i> |

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 product type you wish to delete.
3. Click "Delete" on the corresponding product type's row.



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.

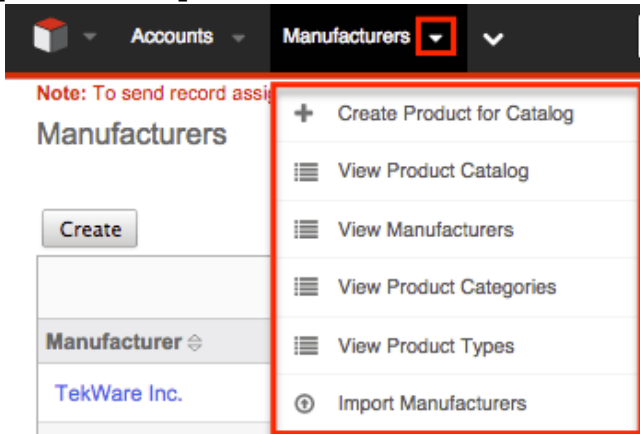
Manufacturers Fields

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 Name dropdown list |
| Status | Choose whether this manufacturer's name should show on the Manufacturer Name dropdown list |
| Order | Enter a number to specify the order in which this category will appear in the Manufacturer Name dropdown list |

Manufacturers Module Tab

The Manufacturers list view can be accessed by navigating to the Admin page and selecting "Manufacturers" under the Product and Quotes panel. Click the tab to access the Manufacturers list view. You may also click the triangle in the Manufacturers 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 |
| View Manufacturers | Opens the Manufacturers list view |
| View Product Categories | Opens the Product Categories list view |
| View Product Types | Opens the Product Types list view |
| Import Manufacturers | Opens the import wizard to create or update manufacturers using external data |

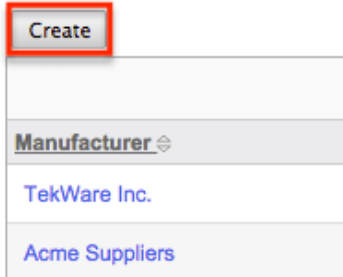
Creating Manufacturers

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:

Manufacturer: *

Status: * Set status to Inactive to remove this manufacturer from the Manufacturer dropdown lists

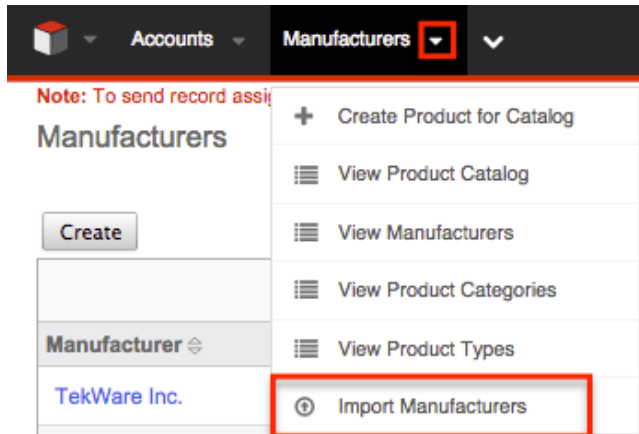
Order: Set the order this manufacturer will appear in the Manufacturer dropdown lists

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. Click the triangle in 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. Please note 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 Name 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.

The screenshot shows the edit view for a manufacturer named 'Acme Suppliers'. At the top, there is a header bar with the name 'Acme Suppliers', the status 'Active', the count '1', and a 'Delete' button. Below this is a toolbar with a dropdown menu, a 'Delete' button, and navigation icons. The main form area has the title 'Manufacturer: Acme Suppliers' and two buttons: 'Save' and 'Save & Create New'. The form fields are: 'Manufacturer: *' with a text input containing 'Acme Suppliers'; 'Status: *' with a dropdown menu set to 'Active' and a tooltip that says 'Set status to Inactive to remove this manufacturer from the Manufacturer dropdown lists'; and 'Order:' with a text input containing '1' and a tooltip that says '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.

| Manufacturer ⇅ | Status ⇅ | Order ⇅ | |
|------------------------------|----------|---------|---------------|
| TekWare Inc. | Active | 1 | Delete |

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.

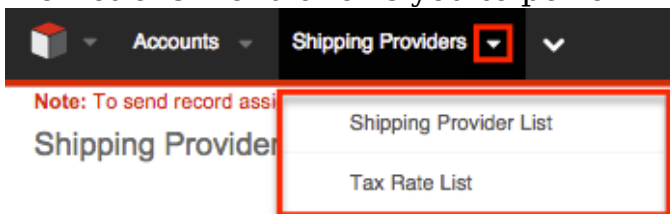
Shipping Provider Fields

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 |

Shipping Providers Module Tab

The Shipping Providers list view can be accessed by navigating to the Admin page and selecting "Shipping Providers" under the Product and Quotes panel. You may also click the triangle in the Shipping Providers 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 Providers list view |
| | |

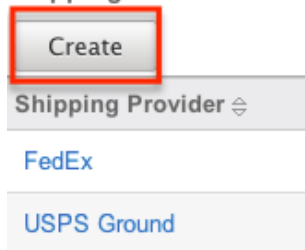
Creating Shipping Providers

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 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: * | <input type="text" value="USPS"/> |
| Status: * | <input type="button" value="Active"/> Set status to Inactive to remove this shipping provider from the Shipping Provider dropdown lists |
| Order: * | <input type="text" value="3"/> 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. Please note 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.

| | | | |
|-------------|--------|---|--|
| USPS Ground | Active | 2 |  delete |
|-------------|--------|---|--|

Shipping Provider: FedEx

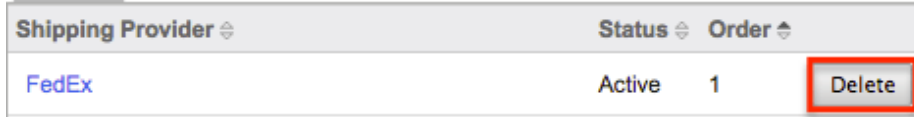
| | |
|----------------------|---|
| Shipping Provider: * | <input type="text" value="FedEx"/> |
| Status: * | <input type="button" value="Active"/> Set status to Inactive to remove this shipping provider from the Shipping Provider dropdown lists |
| Order: * | <input type="text" value="1"/> Set the 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.



| Shipping Provider | Status | Order | |
|-------------------|--------|-------|--------|
| FedEx | Active | 1 | Delete |

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

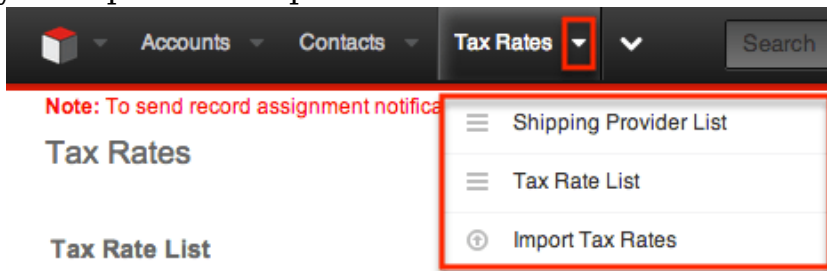
The Tax Rate module contains four stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields.

| 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 click the triangle in the Tax Rates 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 |

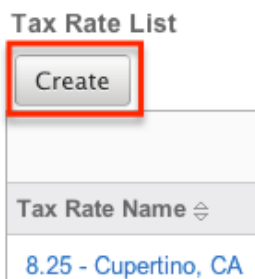
Creating Tax Rates

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



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:

Save Save & Create New

Tax Rate Name: * 6.25 - Boston, MA

Percentage(%): * 6.25

Status: * Active Set status to Inactive to remove this tax rate from the Tax Rate dropdown lists

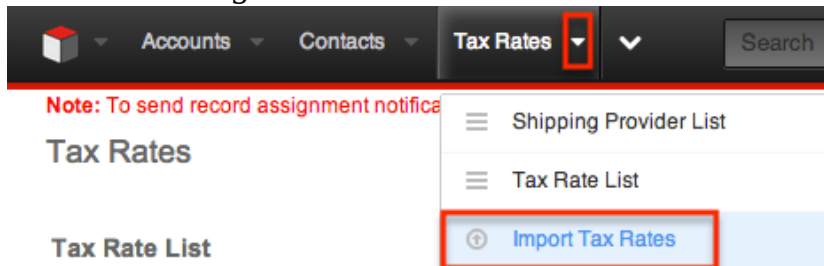
Order: * 3 Set the order in which this tax rate will display in the Tax Rate dropdown lists

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. Click the triangle in 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. Please note 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 - 2 of 2) | | | |

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"/> <small>Set status to Inactive to remove this tax rate from the Tax Rate dropdown lists</small> |
| Order: * | <input type="text" value="1"/> <small>Set the order in which this tax rate will display in the Tax Rate dropdown lists</small> |

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: 12/21/2015 05:37pm

Bug Tracker

Overview

In the [Bugs](#) module, 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: | Found in Release: |
| System Label: | LBL_FOUND_IN_RELEA: |
| Help Text: | |
| Comment Text: | The software or servic |
| 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 module to make changes to the list that controls these fields.

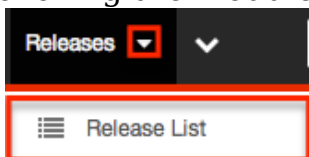
Release Fields

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

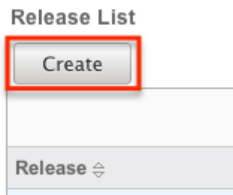
The Releases module tab can be accessed by navigating to the Admin page and clicking "Releases" in the Bugs section. Once in the Releases list view, you can click the triangle in the Releases module tab to display the Actions menu, which allows you to perform important actions within the module. Please note that clicking the module tab allows you to access the Releases list view.



Creating Releases

Releases can only be created from the Releases module. 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: 1.0

Save Save & Create New

Release version: * 1.0

Status: * Active Set status to Inactive to remove this release from the Release dropdown lists

Order: * 2 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: * 5 Set the

Viewing Releases

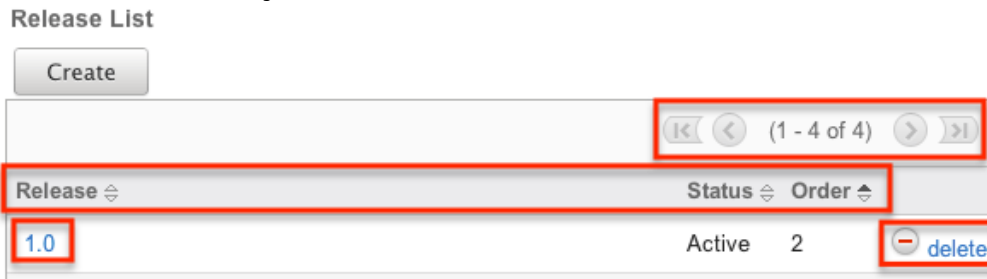
All of the release options are shown on a list view in the Releases module. Due to the Releases module only containing three fields, all of the necessary details are shown on this list view. The list view is always available when viewing the Releases module, and specific releases can be selected from 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.

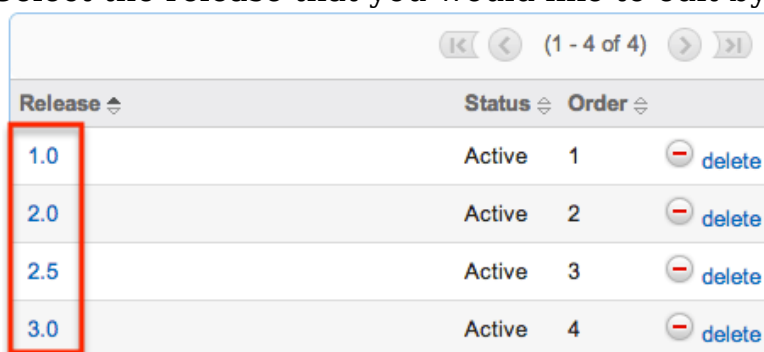
From this list, any of the releases can be clicked and either [edited](#) or [deleted](#).



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 Bugs 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.



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




- Click one of your two save options. Both will store your updates to the record. However, the behavior after clicking is dependent 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 Bugs module:

- Navigate to Admin > Releases.
- 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 |

The page will refresh and the option will now be removed from the list view and no longer appear in the dropdown fields (e.g. Found in Release).

Last Modified: 01/25/2017 05:11pm

Opportunities Configuration

Overview

Sugar provides the option to track opportunities and build forecasts at two different levels of granularity. Admins can choose to use opportunities alone or opportunities in combination with revenue line items.

When working with opportunities alone, each opportunity record will track the progress and total value of an entire potential business deal. The same total deal values will be available when building forecasts.

As an alternative, opportunities used in conjunction with revenue line items track the values of the individual line items of a deal in revenue line item records. Each opportunity, then, is a parent record to a set of revenue line item records. The opportunity stores the summed values of all of its related line items.

Sugar Admins can choose which opportunity model makes the most sense for their organization via Admin > Opportunities.



Note: Changing your instance's opportunity model via Admin > Opportunities will cause all existing forecasting data to be lost. Forecasting must begin anew after the switch has made and the notifications have been received indicating the completion of the back-end tasks.

Note: Switching to use opportunities only will cause all workflows involving the Revenue Line Items module to be deleted from your instance. Making a change to this setting in either direction (i.e. choosing opportunities only or opportunities with revenue line items) will cause all workflows involving the Opportunities module to be disabled. Please review your workflows after making this change to ensure any necessary workflows are set up with the relevant modules.

Note: Changing your instance's opportunity model may cause process definitions (Admin > Process Author) based on the Opportunities or Revenue Line Items to cease functioning as expected. Affected process definitions should be recreated using the correct fields (e.g. Sales Stage for opportunities-only forecasting or Status for opportunities-and-revenue-line-items forecasting).

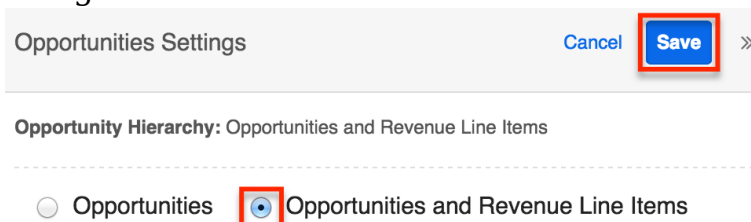
Note: Changing your instance's opportunity model from "Opportunities and Revenue Line Items" to "Opportunities" will cause Revenue Line Items-based dashlets (e.g. My Revenue Line Items dashlet) to no longer work. Users will need to remove these dashlets from their dashboards to avoid any unexpected behavior.

Configuring Opportunities

In the Opportunities section of the Admin panel, you have the ability to change how your instance tracks opportunities and forecasting. You can change from using opportunities only to [using opportunities with revenue line items](#) or from using opportunities with revenue line items to [opportunities by themselves](#).

Moving to Opportunities With Revenue Line Items

In order to change from "Opportunities" to "Opportunities and Revenue Line Items", click the radio button marked "Opportunities With Revenue Line Items" and click "Save". A warning dialog will appear that must be confirmed before the change will be made.



Opportunities Settings Cancel **Save** »

Opportunity Hierarchy: Opportunities and Revenue Line Items

Opportunities Opportunities and Revenue Line Items

For more information on using opportunities in combination with revenue line items, please refer to the [Opportunities](#), [Revenue Line Items](#), and [Forecasts](#) documentation in the Application Guide.

Effects of the Change

Moving to the "Opportunities with Revenue Line Items" model will mean all sales are tracked as opportunities with a revenue line item record for each line item of the sale. An opportunity consists of one or more revenue line items. This affords sales to be detailed in separate line items and summarized in an opportunity. Forecasts will be created based on revenue line items.

Changing the setting from "Opportunities" to "Opportunities and RevenueLineItems" will result in existing data being changed, added, and removed as follows:

- Your existing opportunities will each have one revenue line items created and attached to the opportunity.
- The following fields and values will be duplicated from the existing opportunity records to the new revenue line items records:
 - Likely Amount, Best Amount, Worst Amount

-
- Expected Close Date
 - Next Step
 - The following fields and values will be moved from the existing opportunity records to the new revenue line item records:
 - Sales Stage
 - Probability
 - All forecasting data will be removed and forecasting starts anew.

After you initiate this change, revenue line item records will be created for each existing opportunity in the background. When the revenue line items are complete and available, a notification will appear in your [Notifications indicator](#) and an email will be sent to the email address on your user profile. Please note that your instance must be [configured to send email](#) in order for the notification email to be sent.

Moving to Opportunities Only

In order to change from "Opportunities and Revenue Line Items" to "Opportunities", click the radio button marked "Opportunities". An additional option will appear for controlling the resulting opportunities' Expected Close Date fields. If existing opportunities have multiple revenue line items with differing Expected Close Date values, you must specify if the resulting opportunities should take the earliest or the latest close dates from the revenue line items. After making this selection, click "Save". A warning dialog will appear that must be confirmed before the change will be made.

Opportunities Settings Cancel **Save** »

Opportunity Hierarchy: Opportunities

Opportunities Opportunities and Revenue Line Items

Values calculated from Revenue Line Items to Opportunities

Latest Close Date Earliest Close Date

For more information about using opportunities without revenue line items, please refer to the [Opportunities](#) and [Forecasts](#) documentation in the Professional edition Application Guide.

Effects of the Change

Moving to the "Opportunities" model means that all sales and forecasting will be tracked as opportunities, and revenue line items will not be available.

Changing the setting from "Opportunities and Revenue Line Items" to "Opportunities" will result in existing data being changed, added, and removed as

follows:

- In addition to the information already summarized in each Opportunity, the following information from the Revenue Line Items will be saved in the Opportunity:
 - If all Revenue Line Items are in the "Closed Lost" Sales Stage, the Opportunity will be marked as "Closed Lost"
 - If all Revenue Line Items are closed and at least one was won, the Opportunity will be marked as "Closed Won"
 - If any of the Revenue Line Items are still open, the Opportunity will be marked with the least-advanced sales stage.
- A Note record will be created and attached to the Opportunity to preserve the individual Revenue Line Items values for the following fields:
 - Likely Amount, Best Amount, Worst Amount
 - Expected Close Date
 - Next Step
 - Sales Stage
 - Probability
- Please Note: Custom fields in the Revenue Line Items will not be preserved.
- All Revenue Line Items will be removed from the system.
- All Forecast data will be removed and forecasting starts anew.

After you initiate this change, the revenue line item summarization notes will be built in the background. When the notes are complete and available, a notification will appear in your [Notifications indicator](#) and an email will be sent to the email address on your user profile. If your instance is set up for forecasting, Sugar will also notify you when your opportunity records are synced to the Forecasts module and available for new forecasting.

Please note that your instance must be [configured to send email](#) in order for the notification emails to be sent.

Last Modified: 10/11/2016 06:34pm

Forecast Configuration

Overview

Sugar's Forecasts module incorporates revenue line item records to build forecasting worksheets and predict sales. Users can work towards sales quotas at the individual, team, and sales organization level. Before users may access the

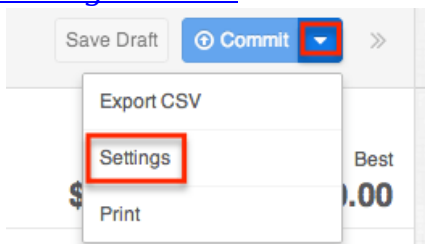
Forecasts module to begin building forecasting worksheets, a user with administrator access must configure the Forecasts module with the organization's desired Time Periods, Ranges, Scenarios, and Worksheet Columns.

Configuring Forecasts

Administrator users can access the Forecast configuration settings by navigating to the Administration page and clicking the Forecasts link.



As an alternative, administrators can also access the Forecast configuration settings by navigating to the Forecasts module. Clicking the Forecasts module tab before the module has been configured will automatically redirect administrators to the configuration wizard. After the module has been configured, they are able to choose "Settings" from the Actions menu within the Forecasts module to review their configuration selections and potentially make changes. For more information on making changes to the configuration, please refer to the [Editing Forecast Configurations](#) section of this documentation.



The Forecasts Setup wizard will guide you through the various configuration items.

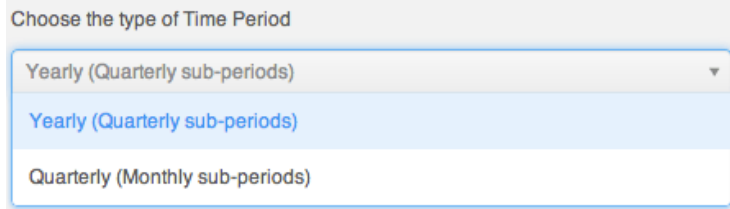
Note: The Forecast Time Periods cannot be changed after initial setup without losing all existing Forecast data. The Forecast Ranges cannot be changed after the first Save Draft or Commit action in the Forecasts module. In order to make changes to these selections, please refer to the [Editing Forecast Configurations](#) section of this documentation.

Time Periods

The Time Periods panel allows you to match the Forecasts module's fiscal year and frequency of quota cycles to your organization's practices. These settings will control the beginning and duration of your forecasting time periods as well as control the number of past and future time periods users may access.

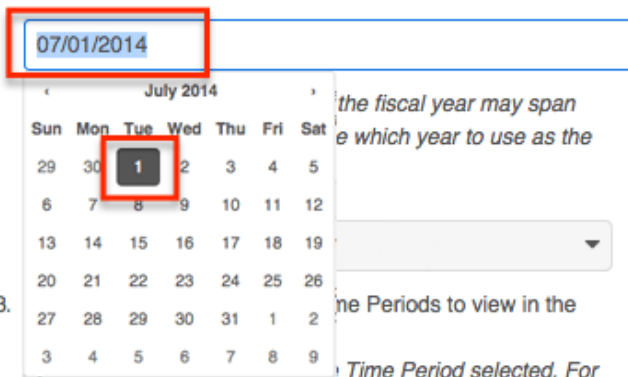
Use the following steps to configure Forecast Time Periods:

1. Select the Time Period type which matches your sales organization's practices. Choose "Yearly" if your sales organization has quarterly quotas which build up to a yearly goal. Choose "Quarterly" if you operate with monthly goals building to quarterly goals instead.



2. Click the calendar icon to select the start day and month of your organization's fiscal year from the date picker.

2. Choose fiscal year start date



3.

Time Period selected. For example, choosing 2 with Yearly Time Period will show 8 future Quarters

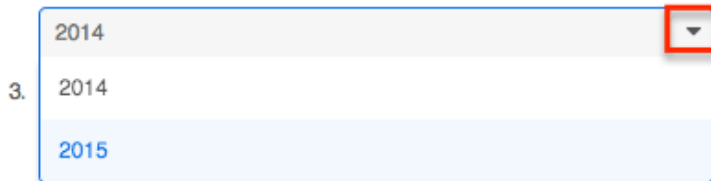
If the start date of your organization's fiscal year is a date other than January 1, the fiscal year will span two years. You must specify which of those two years the start date applies to. In these cases, a dropdown will appear prompting you to select the appropriate fiscal year. For example, if the start date of the fiscal year is 07/01/2014, the end date will be 06/30/2015. The forecast wizard will therefore ask you if the time period 07/01/2014 -06/30/2015 should be considered fiscal year 2014 or fiscal year 2015.

2. Choose fiscal year start date



The chosen start date indicates the fiscal year may span across two years. Please choose which year to use as the Fiscal Year

Fiscal Year:



3.

Note: It is not recommended to choose February 29th for the fiscal year start date, though this is possible to do during a leap year. If this date is chosen,

-
- non-leap years will have fiscal year start date of March 1st.
3. Select how many future time periods users will be able to view in their forecast worksheets. This is the number of base Time Periods (years or quarters) as opposed to the sub-periods (quarters or months).
 4. Select how many past time periods users will be able to view in their forecast worksheets. This is the number of base Time Periods (years or quarters) as opposed to sub-periods (quarters or months).
 5. Click "Next".

Note: The Forecast Time Periods cannot be changed after initial setup without losing all existing Forecast data. In order to make changes after initial setup, please refer to the [Editing Forecast Configurations](#) section of this documentation.

Ranges

Forecast Ranges are a method of predefining which revenue line item records should likely be included on forecasts and which should not. As the administrator, you will specify the sale probabilities that will cause revenue line items to be initially included on a user's forecast. Each user, however, can then manually choose to include or exclude their revenue line items no matter how the probabilities line up with these ranges.

In addition to initially including revenue line items, these ranges will also be available to users in the Forecasts module as categories for filtering or for grouping in charts. Ranges which are not associated with probabilities and are used strictly for categorical purposes may be added under the Custom Ranges option.

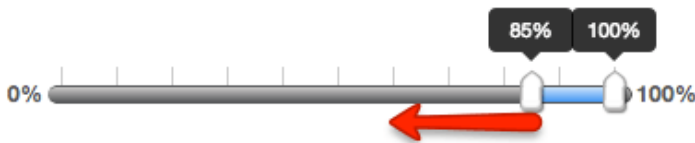
Two Ranges

Choose the Two Ranges radio button for a simple include or exclude model. You will then drag the left slider to specify the minimum probabilities that qualify a revenue line item to be initially included on forecasts. In this two-range model, all revenue line items with probabilities falling below the defined range will be initially excluded from forecasts. Choosing "Two Ranges" will cause the categories "Include" and "Exclude" to be available for users in the Forecasts module for filtering or grouping revenue line items in charts.

Two Ranges

Opportunities can be included or excluded from the forecast.

Include:



Exclude:

All other opportunities will be excluded.

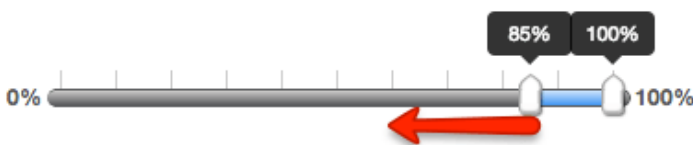
Three Ranges

Choose the Three Ranges radio button to enable an intermediate range. Drag the left Include slider to specify the minimum probabilities that qualify a revenue line item to be predefined as included on forecasts. Then use the Upside sliders to define the range of probabilities which will be initially excluded from forecasts but which can be viewed independently for consideration for inclusion by the user. All revenue line items with probabilities falling outside these two ranges will also be predefined as excluded from forecasts. Choosing "Three Ranges" will cause the categories "Include", "Upside", and "Exclude" to be available for users in the Forecasts module for filtering revenue line items in charts.

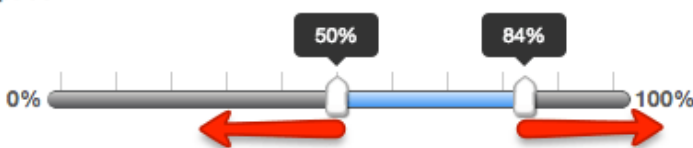
Three Ranges

Opportunities can be tagged as Include, Upside, or Exclude in the forecast. Upside is not included in forecasts by default, but allows users to further classify the excluded opportunities based on likelihood to close.

Include:



Upside:



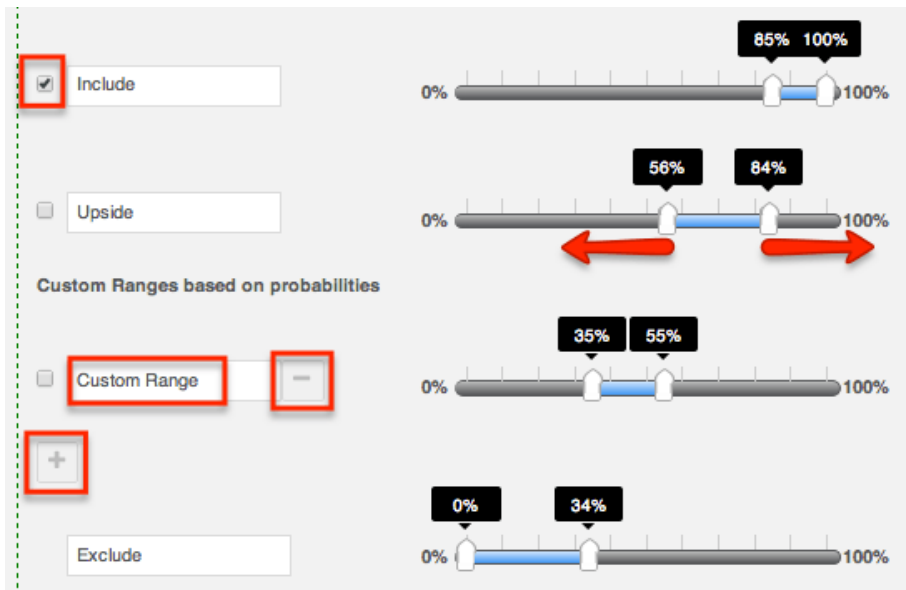
Exclude:

All other opportunities will be excluded.

Custom Ranges

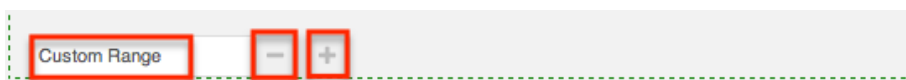
Choose the Custom Ranges radio button if you would like to create additional, more customized ranges. Custom ranges based on probabilities will be used to initially determine whether or not a revenue line item is included or excluded in forecasts.

- The Include and Exclude ranges are required, though you may change their names if desired.
- Use the plus button to add additional ranges.
- Use the minus button to remove unwanted ranges.
- Use the text box to specify the desired name for each range.
- Mark the check box of every range which should be included on forecasting worksheets.
- Use each range's sliders to determine the minimum and maximum probabilities which will correlate with each range.



You may also add custom ranges not based on probability at the bottom of the ranges panel. These values do not correlate with any probabilities, and revenue line items marked with these range options will not be included on forecasting worksheets. Ranges created in this section may be used as tags on the revenue line item record.

- Use the plus button to add additional ranges.
- Use the minus button to remove unwanted ranges.
- Use the text box to specify the desired name for each range.



Once you are satisfied with your range selections, click "Scenarios" to open the next panel.

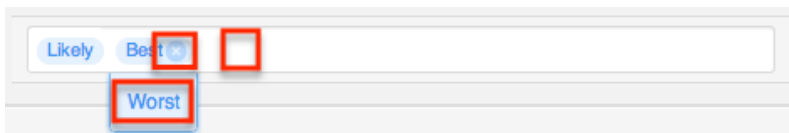
Note: The Forecast Ranges cannot be changed after the first Save Draft or Commit action in the Forecasts module without losing all existing Forecast data. In order to

make changes after initial setup, please refer to the [Editing Forecast Configurations](#) section of this documentation.

Scenarios

The Scenarios panel allows you to specify if you wish to have revenue line item records' Best Case and/or Worst Case fields available on the forecast worksheets. The "Likely" scenario is included automatically because it matches the revenue line item record's required amount field. When "Best" and "Worst" are also selected, users will have the ability to view and modify these additional values based on their opinion of what values may come about in the sale. This provides a broader range possible sales information when working to make forecasts as predictive as possible.

To add the Best or Worst scenario, click in the text box and select from the dropdown list which appears. Unwanted scenarios may be removed by clicking the "x".



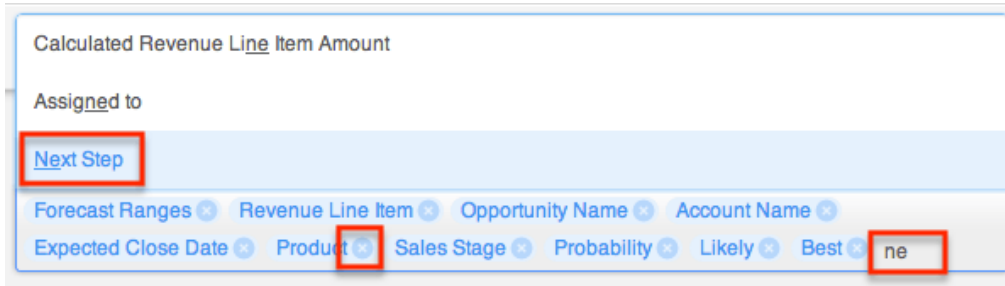
Once you are satisfied with your range selections, click "Worksheet Columns" to open the next panel.

Note: The Forecast Scenarios configurations may be changed at any time following initial setup by returning to the Admin > Forecasts page.

Worksheet Columns

The Worksheet Columns panel allows you to specify which fields will be available as columns in the Forecasts module. Users will be able to select from this list to configure the final appearance of their worksheet. For more information on selecting desired columns, please refer to the [Forecasts](#) documentation. Please note that "Best" and "Worst" will only be available if they are enabled in the Scenarios panel. Re-enabling one of these scenarios will automatically add it to the list of worksheet columns.

Add additional fields by clicking in the text box and choosing from the dropdown list which appears. Typing in the text box will narrow down the list to show only matching fields. Unwanted fields may be removed by clicking the "x".



Once you are satisfied with your worksheet column selections, click "Save" at the top right.

Note: The Forecast Scenarios configurations may be changed at any time following initial setup by returning to the Admin > Forecasts page.

Editing Forecast Configurations

Once the Forecast Configurations have been completed, Sugar will apply the selected options and do an initial load of revenue line items to the Forecasts module. The selected Time Periods are locked at the completion of the Forecast Configuration wizard, and the Ranges are locked once the first Save Draft or Commit action is performed within the Forecasts module. If, at a later time, the selections you made for Time Periods and Ranges need to be changed, the only way this can be accomplished is at the expense of any existing Forecasting data.

Should you choose to lose all forecasting worksheets for the current, past, and future time periods, a user with administrator access can navigate to <https://yourinstancename.com/#bwc/index.php?module=Forecasts&action=ResetSettings> (where "https://yourinstancename.com" represents the URL you use to navigate to your Sugar instance) to instantly reset the Forecasts module. Please note that you cannot undo this action, and you will not be prompted to confirm this decision before it takes effect.

Please take caution: Navigating to the aforementioned URL will reset your Forecasts module to a state as if it had never been used before, enabling you to make fresh selections for all elements within the Forecasts Configuration by navigating to Admin > Forecasts. Your instance's revenue line item records will not be affected.

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

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.

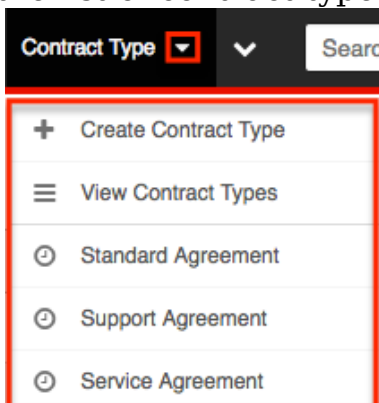
Contract Type Fields

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 Type module tab can be accessed by navigating to the Administration page and clicking "Contract Types" in the Contracts section. Once in the Contract Types list view, you can click the triangle in the Contract Type module tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The [Recently Viewed menu](#) displays the list of contract type records you last viewed in the module.



The Actions menu allows you to perform the following operations:

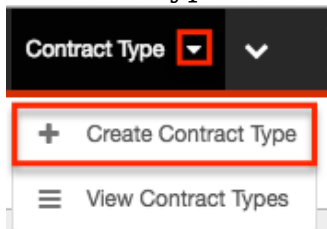
| Menu Item | Description |
|--------------------------------------|---|
| Create Contract Type | Opens the edit view layout to create a new contract type |
| View Contract Types | Opens the list view layout to search and display contract types |

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.

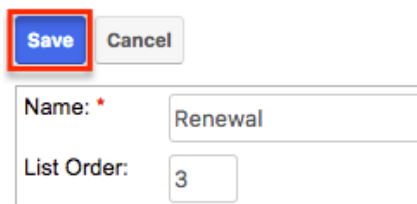
Use the following steps to create a contract type via the Contract Type module:

1. Navigate to Admin > Contract Types.
2. Click the triangle in the Contract Type module tab 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

A screenshot of the 'Create' form for a contract type. At the top, there are two buttons: 'Save' (highlighted with a red box) and 'Cancel'. Below the buttons, there are two input fields. The first field is labeled 'Name: *' and contains the text 'Renewal'. The second field is labeled 'List Order:' and contains the number '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

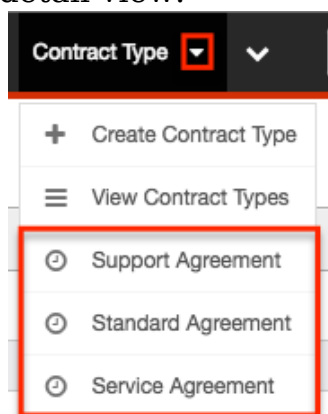
The Contract Types list view displays all contract type records meeting the current search criteria. To access the list view, simply click the [Contract Types module tab](#). While list view shows key contract type fields, you can click the contract type's name to open the record in detail view to view 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. Click the triangle in the [Contract Types module tab](#) to see a list of the 3 records you most recently viewed in the module. Clicking the record's name (e.g. Service Agreement) within the list will open it 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.

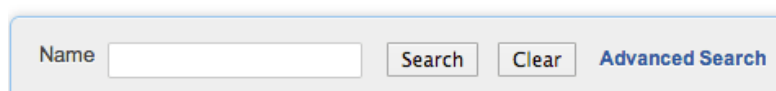
Basic Search

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.

Contract Types



The image shows a search interface for 'Contract Types'. It features a light gray background with a rounded rectangle containing a search form. On the left, the word 'Name' is followed by a white text input field. To the right of the input field are three elements: a 'Search' button, a 'Clear' button, and a link labeled 'Advanced Search' in blue text.

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 a search interface with the following elements: a 'Name' input field; a 'Layout Options' section with a dropdown arrow; a 'Save search as:' label followed by an input field and a 'Save' button; a 'Modify current search:' label followed by 'Update' and 'Delete' buttons; and a row of buttons including 'Search', 'Clear', 'Basic Search' (highlighted), and 'Saved Searches' with a dropdown menu 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

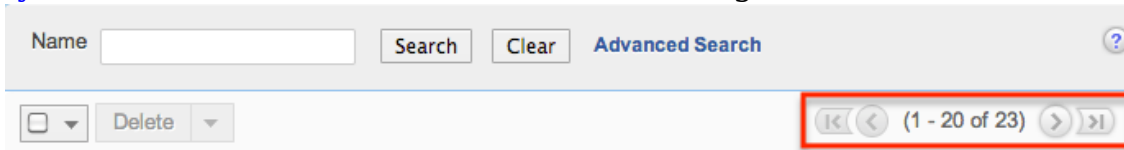
The Contract Types list view displays all contract type records meeting the current search criteria. You can view the basic details of each contract type within the field columns.

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.

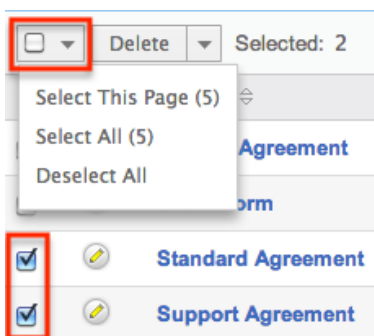
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.



Checkbox Selection

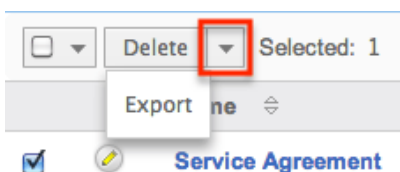
You can perform several actions on contract type records directly from the list view by first selecting the desired records. To select individual contract type records on the Contract Types list view, mark the checkbox on the left of each row. To select or deselect multiple contract type records on the 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.

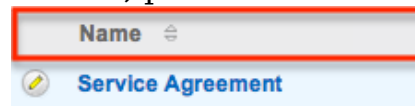


The options in the Actions menu allow you to perform the following operations:

| 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

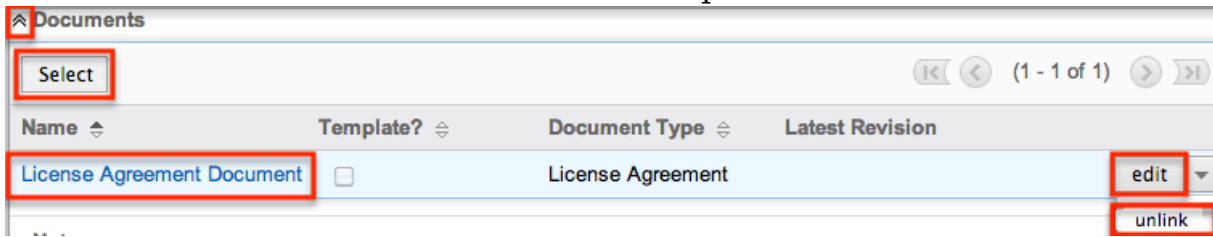
The Contract Types detail view displays information such as the contract's name and list order. You can also view related documents to the contract type record which appear in a subpanel beneath the contract type fields. The detail view can be reached by clicking the contract type record's link from 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 "Unlink" 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

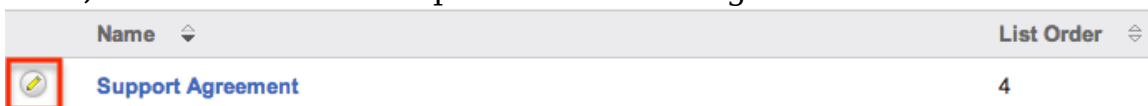
Name: * Service Agreement

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.



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](#).

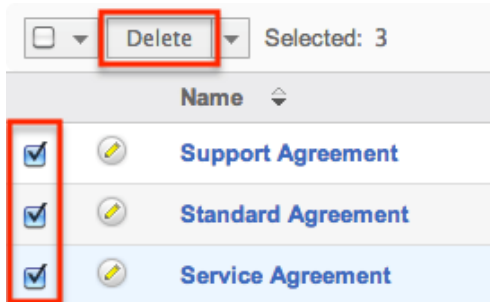
Deleting Contract Types

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](#) options.
4. Choose "Delete" from the Actions menu.



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

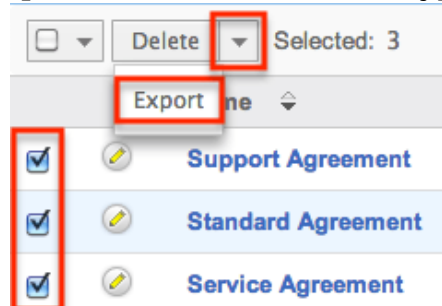
Due to PHP memory limitations on the server, there may be occasions when the application times out while deleting a large number of contract type records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

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: 02/02/2017 12:03pm

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

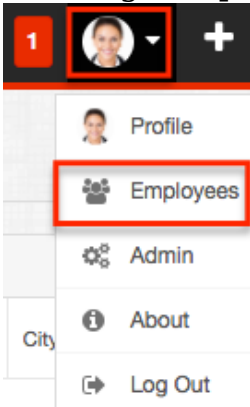
The Employees module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Fields can be altered, added, or removed via Admin > Studio. For more information on configuring fields, please refer to the [Studio](#) documentation in the

Administration guide.

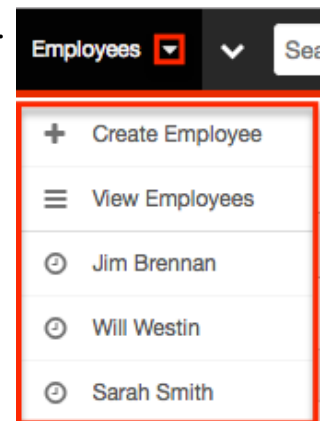
| Field | Description |
|-----------------|---|
| City | The city of the employee's address |
| Country | The country of the employee's address |
| Department | The department where this employee works |
| Email Address | The employee's email address |
| Employee Status | The employee's employment status 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 lists the employee's manager, if the manager is a Sugar user |
| State | The state of the employee's address |
| Title | The employee's job title |

Employees Module Tab

The Employees module tab can be accessed by clicking your profile icon and selecting "Employees" in the user menu.



Once in the Employees list view, you can click the triangle in the Employees module tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The [Recently Viewed menu](#) displays the list of employees you last viewed in the module. Please note that clicking the module tab allows you to access the Employees list view.



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

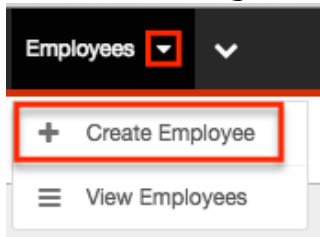
opens when creating the employee directly from the Employees menu and includes all of the relevant fields for your organization's employees. The edit view layout can be configured via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#) documentation.

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:

Use the following steps to create an employee via the Employees module:

1. Click the triangle in the Employees module tab 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

| | |
|------------------|-------------------------------------|
| Employee Status: | <input type="text" value="Active"/> |
| First Name: | <input type="text" value="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.

A screenshot of a form titled 'Employee Information'. It contains several fields: 'Employee Status' with a dropdown menu set to 'Active', 'Title' with a text input field containing 'President', and 'Work Phone' with a text input field containing '(408)'. A checkbox labeled 'Display Employee Record:' is checked and highlighted with a red rectangular box.

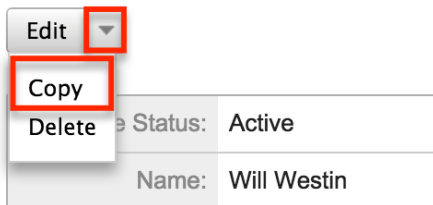
Creating Via Duplication

You can also create a new employee by duplicating an existing employee record. The Copy 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. Click the Actions menu and select "Copy".

» Will Westin



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

Create

A screenshot of a form titled 'Create'. It has two buttons: 'Save' (highlighted with a red box) and 'Cancel'. Below the buttons, there are two input fields: 'Employee Status:' with a dropdown menu showing 'Active', and 'First Name:' with a text input field containing 'Will'.

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

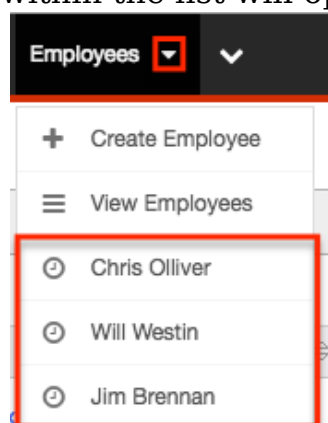
click the employee's name to open the record in detail view. For more information on viewing employees via list view, please refer to the [Employees List View](#) section of this documentation.

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. Click the triangle in the [Employees module tab](#) to see a list of the 3 records you most recently viewed in the module. Clicking the record's name (e.g. Will Westin) within the list will open it 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.

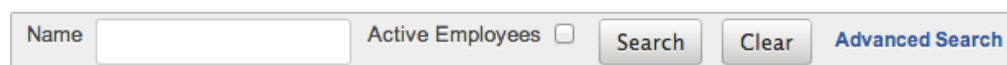
Basic Search

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



The screenshot shows a search interface with a text input field labeled "Name", a checkbox labeled "Active Employees", and three buttons: "Search", "Clear", and "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.

The screenshot shows a search interface with the following elements:

- Search Criteria Fields:**
 - First Name, Last Name, Employee Status (dropdown menu with options: Active, Terminated, Leave of Absence)
 - Title, Any Phone, Department
 - Any Email, Any Address, City
 - State, Postal Code, Country
- Layout Options:** A section with a dropdown arrow, containing a "Save search as:" field with a "Save" button and a "Modify current search:" section with "Update" and "Delete" buttons.
- Buttons:** "Search", "Clear", "Basic Search" (highlighted), "Saved Searches" (with a dropdown menu showing "-none-"), and a help icon (?) in the top right corner.

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.

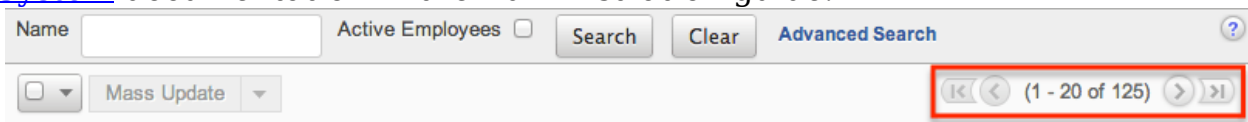
You have the option to change what fields are displayed in the list view by configuring your layout options in the [Employees advanced search](#). For more information on configuring your list view, please refer to the [Layout Options](#)

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.

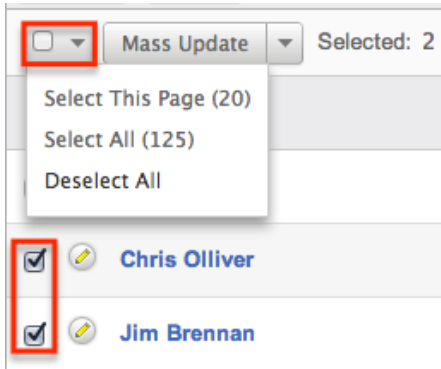
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.



Checkbox Selection

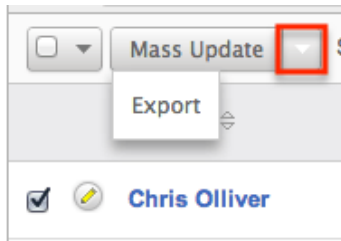
You can perform actions on employee records directly from the list view by first selecting the desired records. To select individual employee records on the Employees list view, mark the checkbox on the left of each row. To select or deselect multiple case records on the list view, use the options in 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.

» Chris Olliver

◀ (2 of 125) ▶

| | | | |
|------------------|---------------|----------|---|
| Employee Status: | Active | Picture: |  |
| Name: | Chris Olliver | | |

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

| | | | |
|------------------|-----------|---------------|---|
| Employee Status: | Active | Picture: | <input type="button" value="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

| | | | |
|------------------|--------|----------------|------------------|
| Employee Status: | Active | Title: | President |
| First Name: | Joseph | Last Name: * | Kelly |
| Department: | N/A | Work Phone: | (408)555-9876 |
| Reports to: | | Email Address: | joseph@sugar.com |

Save Cancel Full Form

Sarah Smith Sales Manager West Jim Brennan sarah@example.com Activ

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.

» Joseph Kelly

Edit

| | |
|------------------|--------------|
| Employee Status: | Active |
| Name: | Joseph Kelly |

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.

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

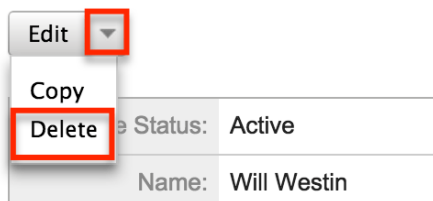
Deleting Employees

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. Click the Actions menu and select "Delete".

» Will Westin

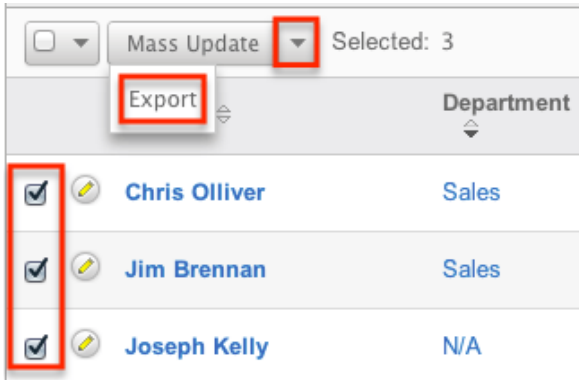


3. A pop-up message will display asking for confirmation and alerting you that the User record will also be deleted. Click "Ok" to proceed.

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.

Mass Update

| | | | |
|---------------------------------------|----------------------|---------------------------------------|--------|
| Display Employee Record | -none- | Employee Status: | -none- |
| Reports to | <input type="text"/> | Preferred Language: | -none- |
| | | <input type="button" value="Select"/> | |
| <input type="button" value="Update"/> | | <input type="button" value="Cancel"/> | |

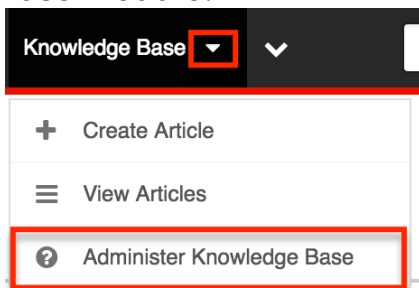
6. Click "Update" to save the changes to all of the currently selected employee records.

Last Modified: 01/25/2017 12:16pm

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

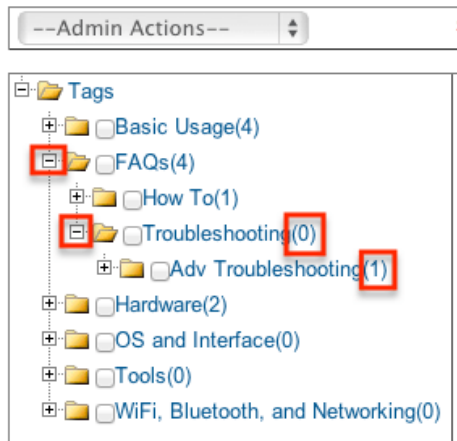


Tags in Sugar will display in the tree structure with the count of articles in that tag next to the tag name in parentheses. For example : Basic Usage tag has four articles with that tag.

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

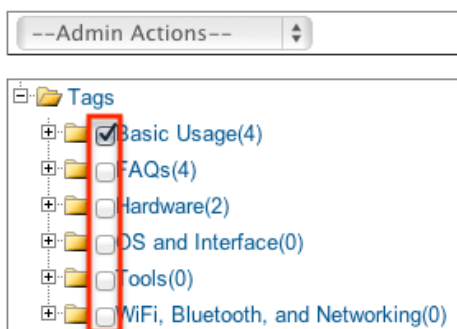


You can have multiple child tags for a parent and you can nest tags for many levels. The article count for each tag only includes articles explicitly assigned to the tag and does not include any articles assigned to child tags. Notice in the screen above, Adv Troubleshooting tag has one article assigned, 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

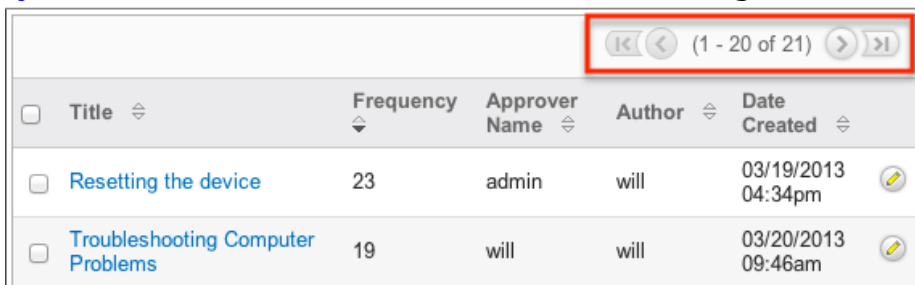
The Knowledge Base Administration list view displays all articles for the selected

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.

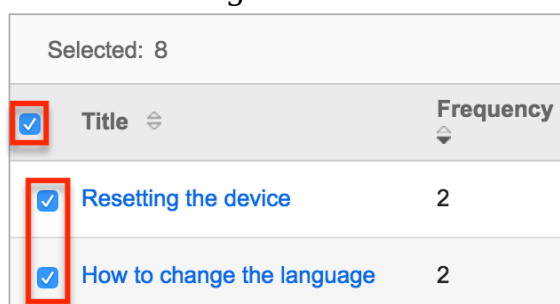


| <input type="checkbox"/> | Title ⇅ | Frequency ⇅ | Approver Name ⇅ | Author ⇅ | Date Created ⇅ | |
|--------------------------|---|-------------|-----------------|----------|--------------------|--|
| <input type="checkbox"/> | Resetting the device | 23 | admin | will | 03/19/2013 04:34pm | |
| <input type="checkbox"/> | Troubleshooting Computer Problems | 19 | will | will | 03/20/2013 09:46am | |

Checkbox Selection

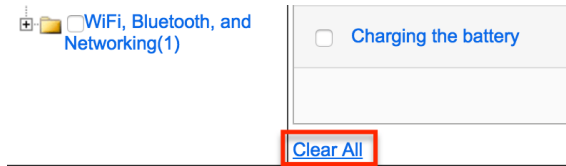
You can perform several actions on articles directly from the list view by first selecting the desired records. To select individual articles on the Knowledge Base Administration list view, mark the checkbox on the left of each row.

- **Select This Page** : Selects all records shown on the current page of results.



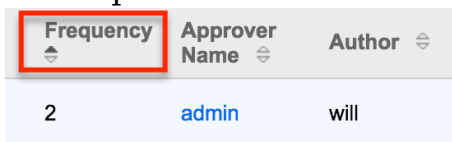
| Selected: 8 | | |
|-------------------------------------|--|-------------|
| <input checked="" type="checkbox"/> | Title ⇅ | Frequency ⇅ |
| <input checked="" type="checkbox"/> | Resetting the device | 2 |
| <input checked="" type="checkbox"/> | How to change the language | 2 |

- **Clear All** : Deselects all records that are currently selected.



Column Sorting

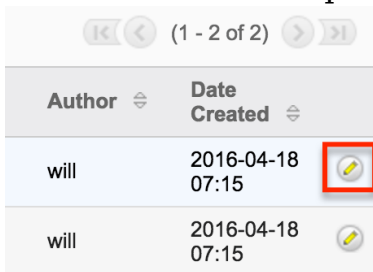
List view provides the ability to sort all of the current results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only 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.

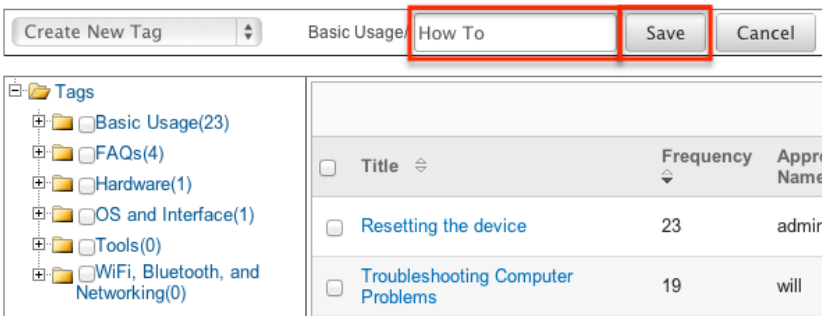
Knowledge Base Admin



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:

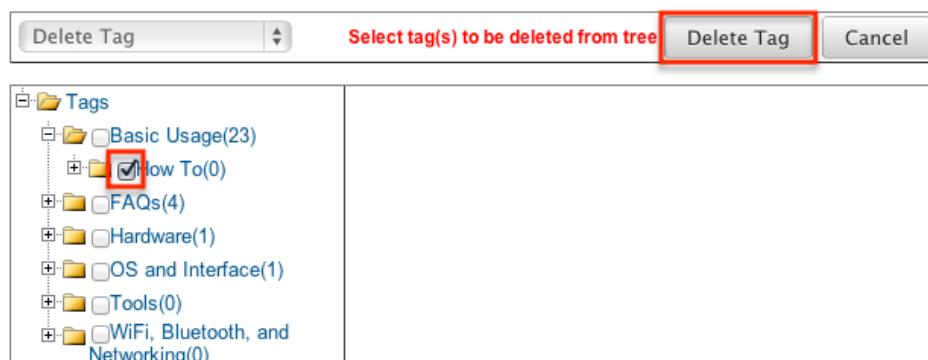
1. Select "Delete Tag" from the Admin Actions menu.

Knowledge Base Admin



2. Click the checkbox next to one or more tags to be deleted and click "Delete"

Knowledge Base Admin



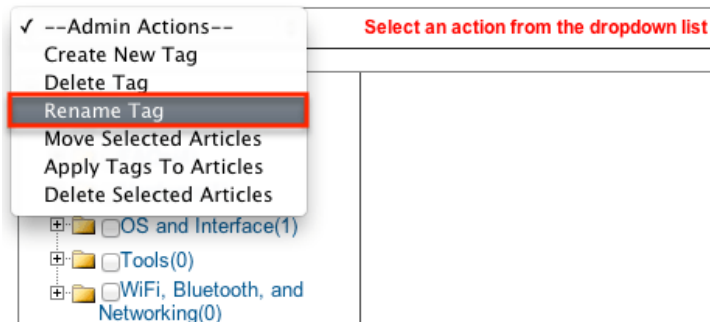
3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

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:

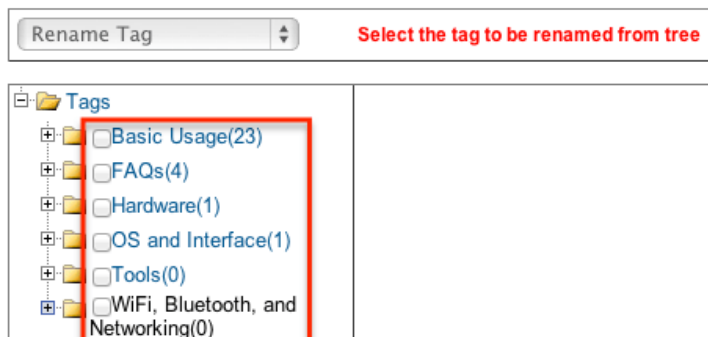
1. Select "Rename Tag" from the Admin Actions menu.

Knowledge Base Admin



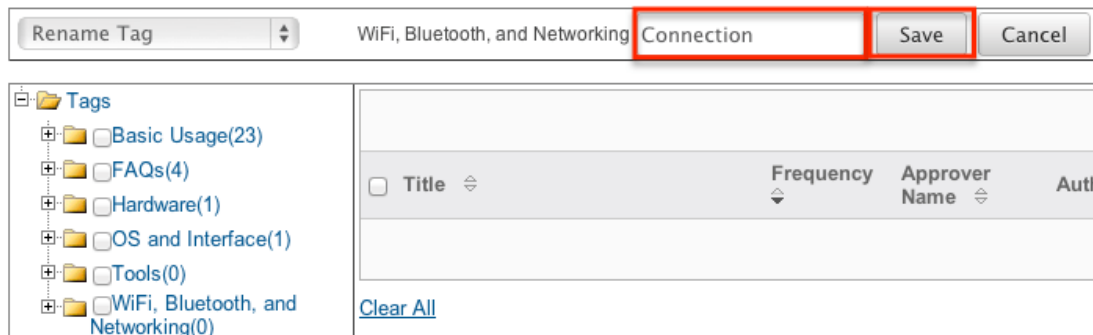
2. Select a tag name to be renamed.

Knowledge Base Admin



3. Enter in a new name for the tag and click "Save"

Knowledge Base Admin

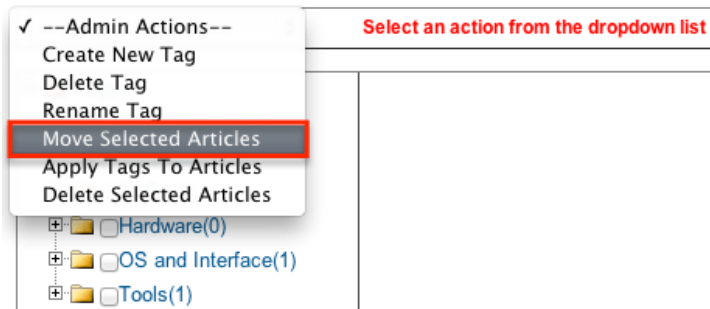


Moving Selected Articles

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



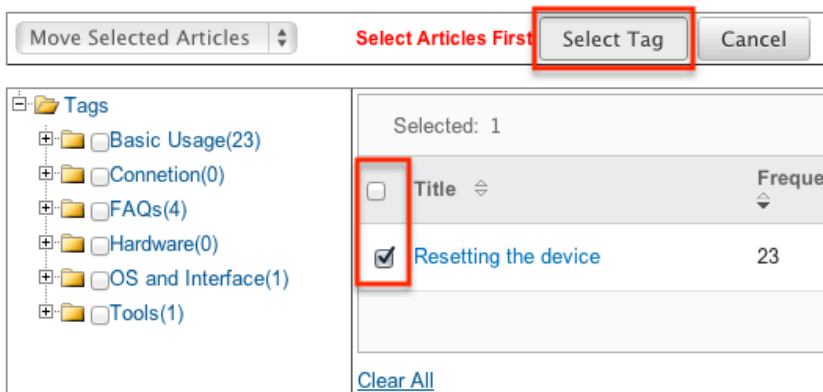
2. Select a tag in the tag tree to show the articles in that tag in the list view.

Knowledge Base Admin

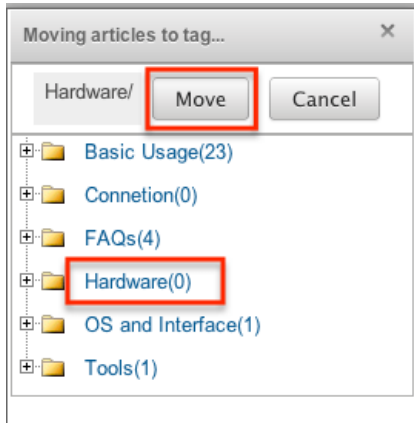


3. Select the articles in that tag you would like to move and click "Select Tag".

Knowledge Base Admin



4. Select the destination tag for the articles selected and click "Move"

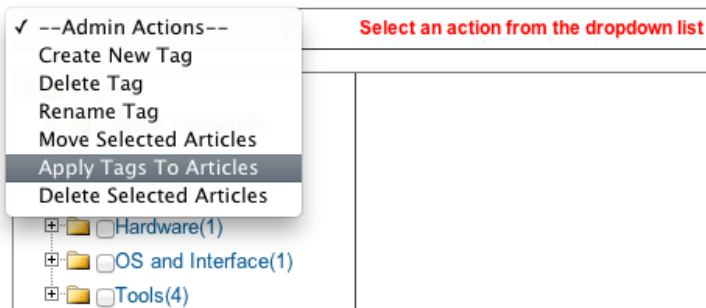


Applying Tags To Articles

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



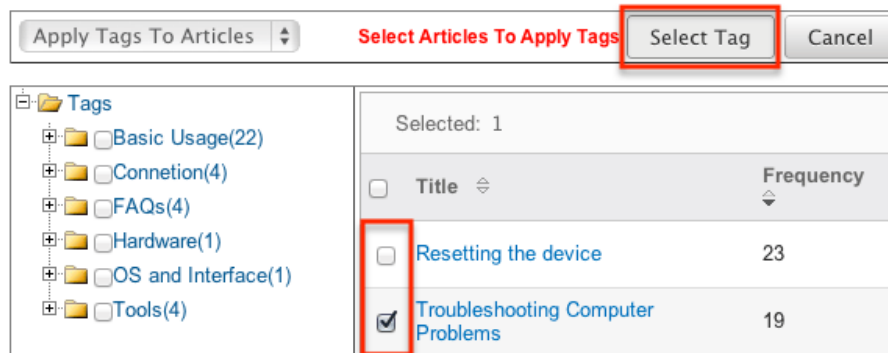
2. Select a tag in the tag tree to show the articles in that tag in the list view.

Knowledge Base Admin

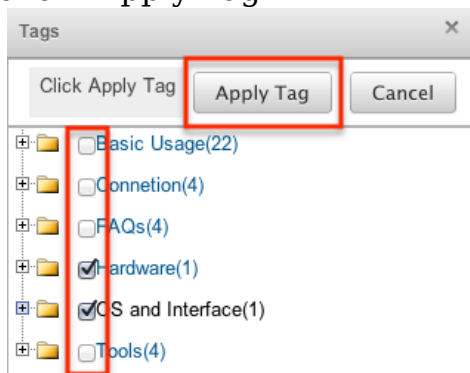


3. Select the articles in that tag you would like to move and click "Select Tag".

Knowledge Base Admin



4. Select the checkboxes next to the tags to place on the articles selected and click "Apply Tag"

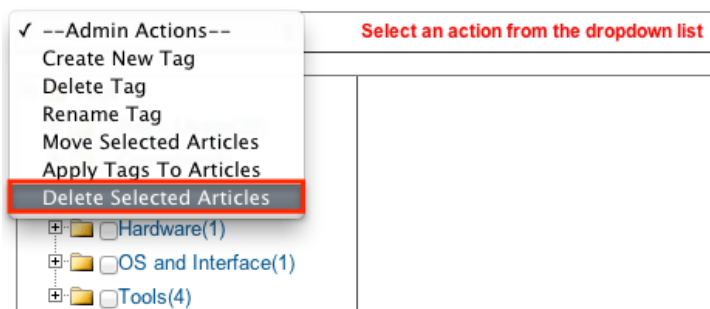


Deleting Selected Articles

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



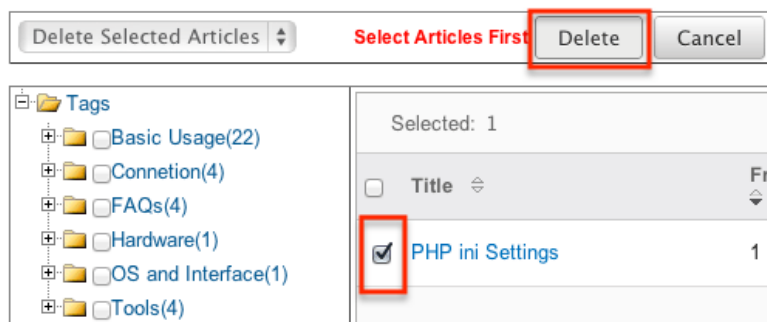
2. Select a tag in the tag tree to show the articles in that tag in the list view.

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.

Last Modified: 05/04/2016 08:47pm

Process Author

Overview

Sugar Process Author™ (re-named Sugar Advanced Workflow in later versions) enables administrators to streamline common business processes by managing approvals, sales processes, call triaging, and more. Sugar Process Author is an easy-to-use business process management (BPM) and workflow tool that adds advanced BPM functionality to Sugar.

Note: Process Author, also known as Sugar's Advanced Workflow, is exclusive to Enterprise and Ultimate editions of Sugar 7.6.x and later.

The Process Author suite features an extensive toolbox of modules that provide the ability to easily create digital forms and map out robust workflows. The drag-and-drop interface requires no programming experience.

This documentation contains the following pages:

- Process Author (current page)
- [Process Definitions](#)
- [Process Business Rules](#)
- [Process Email Templates](#)

Additionally, the [Processes](#) page of the Application Guide contains documentation for the user-facing elements of Process Author, and the [Knowledge Base](#) contains several business use-case tutorials on how to design some common workflow processes for your organization.

Scope

This documentation only defines relevant BPM terminology and the concepts used specifically for Sugar Process Author modules. It is not intended for general BPM educational purposes, and should not be used as a complete BPM modeling resource.

Prerequisites

- Basic knowledge of process design is required.
- Basic knowledge of process standards such as BPMN is preferred. BPMN is flowchart-based notation for defining business processes within an organization.
- You should know which business processes you want to automate in Sugar.

Core Concepts

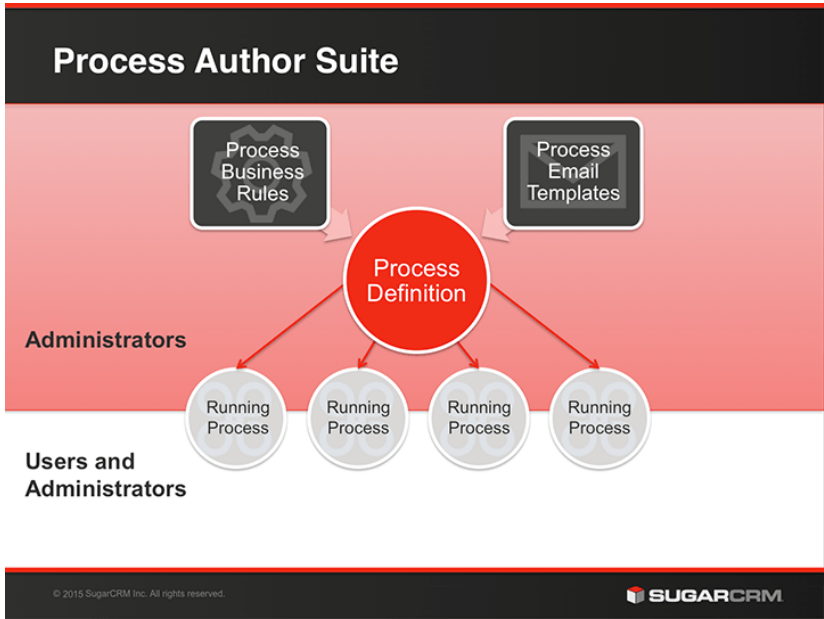
A business process is a set of logically related tasks that are performed in order to achieve a specific organizational goal. It presents all of the tasks that must be completed in a simplified and streamlined format. Process Author empowers Sugar administrators to automate vital business processes for their organization. Some examples of business processes that can be automated using Process Author include invoice approvals, lead routing, customer service case routing, and automated reminders and escalations.

Process Author Modules

In order to seamlessly automate business processes, Sugar Process Author suite leverages four interconnected process-related modules. The [Process Business Rules](#) module and the [Process Email Templates](#) module are used to create rules and email templates that will be referenced by records created in the [Process Definitions](#) module. Once a process definition has been created, it will generate a record in the [Processes](#) module each time the process definition is triggered.

The Process Business Rules, Process Email Templates, and Process Definitions modules can be viewed and configured by any system administrator user. In addition, regular users with a role that provides developer access to one or more modules will be able to access all Process Author functions for those modules. Regular users without developer role permissions will only have access to the Processes module. For more information about roles, please review the [Role Management](#) documentation.

The following image illustrates the relationship between the Process Author modules:



The following table describes the four Process Author modules and their intended use. To learn more about any of the modules, click on the hyperlinked module name.

Note: We recommend reading this page in its entirety before moving on to other Process Author sections.

| Module | Description |
|-------------------------------------|---|
| Process Definitions | A process definition defines the steps in an overall business process. Process definitions are created by a Sugar administrator. The process definition consists of a network of activities and their relationships, criteria to indicate the start and end of the process, and information about the individual activities (e.g., participants) contained within the business process. |
| Processes | A process is a running instance of a process definition. A single process begins every time a process definition is executed. For example, a process definition could be created to automate quote approvals, but because users may engage in several quote approvals per day, each approval will be represented by a unique process, all governed by the master process definition. In other |

words, the Processes module is the many-to-one (M:1) child module of Process Definitions.

The Processes module is the only Process Author module that is visible to regular users. From the Processes dashlet and module list view, they will be able to see running processes if there is anything for them to approve, reject, or review.

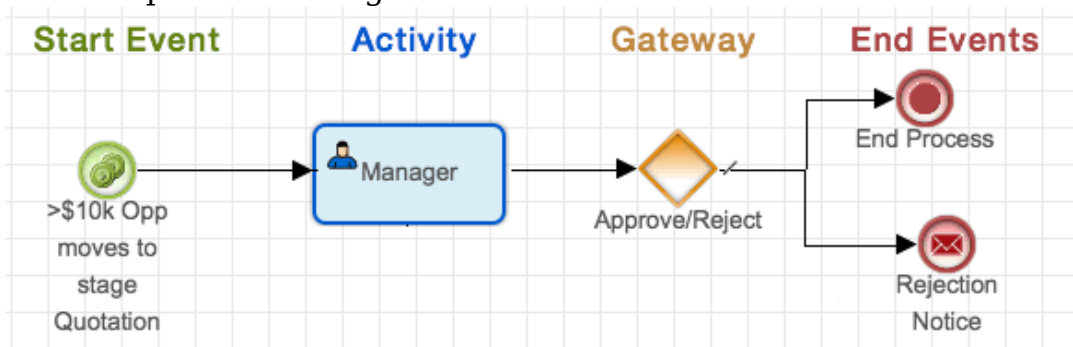
There are three ways an administrator can view a list of processes:

- **Processes module list view** : List views for the Processes module display processes that require the logged-in user to take approve, reject, or review action. Admin users, like regular users, will only see the processes that are waiting for them. List views can be accessed by navigating to Processes > View Processes.
- **[Processes dashlet](#)** : This dashlet displays processes that require the logged-in user to take approve, reject, or review action. Admin users, like regular users, will only see the processes that they need to act upon.
- **[Process Management page](#)** : This is the one place in Sugar where an administrator can see all running, cancelled, and completed processes. From the Process Management page, the admin can also monitor process status, reassign or cancel an in-progress process, or repair processes in an error state. The Process Management page is accessible via the Admin > Process Author panel or via the Processes module tab by




| | |
|---|---|
| | clicking on "Process Management". |
| Process Business Rules | A process business rule is a reusable set of conditions and outcomes that can be embedded in a process definition. The set of rules may enforce business policy, make a decision, or infer new data from existing data. For example, if Sally manages all business opportunities of \$10,000 or more, and Chris manages all business opportunities under \$10,000, a process business rule can be created and used by all relevant process definitions to ensure that the assignment policy is respected. In the case of an eventual personnel change, only the process business rule will need to be edited to affect all related processes. |
| Process Email Templates | A process email template is required in order to include a Send Message event in a process definition. Sugar's core product includes several places where email templates can be created for different purposes, but Process Author requires all sent messages to be created via the Process Email Templates module. |



Basic Visual Notation Elements



Sugar Process Author depends on process definitions created by the administrator using a Visual Designer tool. When complete, the design will graphically display a collection of flow elements that connect with each other to define and regulate a business process in Sugar.



The following table defines the different types of flow elements that are available when creating a process definition in the Visual Designer.

| Element | Symbol | Definition |
|-------------------------------------|---|--|
| Events |  | <p>An Event is something that happens during the course of a business process. Events affect the flow of the Process and usually have a trigger and/or a result. They can start, interrupt, or end the flow of a process.</p> <p>An Event is represented by a circle in the Visual Designer.</p> |
| Start Events |  | <p>The Start event indicates where a process will begin. It defines the action that will trigger the Process. The Start event will always be characterized Sugar module selected as the record's Target Module, but will vary by conditions such as whether it applies to newly created records or updated records.</p> <p>Note: A process definition's target module will be the same module that is used for the Start event.</p> <p>A Start event is represented by a green circle on the Visual Designer canvas.</p> |
| Intermediate Events |  | <p>As the name suggests, Intermediate events occur after a process starts but before the process is</p> |

| | | |
|-----------------------------------|---|--|
| | | <p>complete. Intermediate events that are placed within the overall process flow represent things that happen during the normal operation of the process such as sending messages, receiving messages, or mandatory waiting periods.</p> <p>Intermediate events are represented by blue circles in the Visual Designer.</p> |
| <p>Activities</p> |  | <p>The only unit of work that may require a user response (opposed to automation) is an Activity. It is a moment within a flow where a user must decide if a circumstance is approved or rejected, or review a record that has been routed to them.</p> <p>Activities are represented by rounded-corner rectangles in the Visual Designer.</p> |
| <p>Actions</p> |  | <p>Actions are automated elements used to execute a business rule, create or update a Sugar record, or identify a process user. Actions are completed by the Process Author engine and do not require any human interaction to execute.</p> <p>Actions are represented by rounded-corner squares in the Visual Designer.</p> |
| <p>Gateways</p> | | <p>Gateway elements are</p> |

| | | |
|----------------------------|--|--|
| |  | <p>used to control the flow of a process via merging and splitting. When several activities may result in a common outcome, a gateway serves as a merging mechanism, or a "converging" element. When a single activity may result in several different outcomes, a gateway serves as a splitting mechanism, or a "diverging" element.</p> <p>A Gateway is represented by a diamond in the Visual Designer.</p> |
| End Events |  | <p>End events signal completion of a process. There are three end-event options: Do Nothing, Terminate Process, or Send Message. An End event is represented by a red circle in the Visual Designer.</p> |

Basic Steps to Automate a Business Process

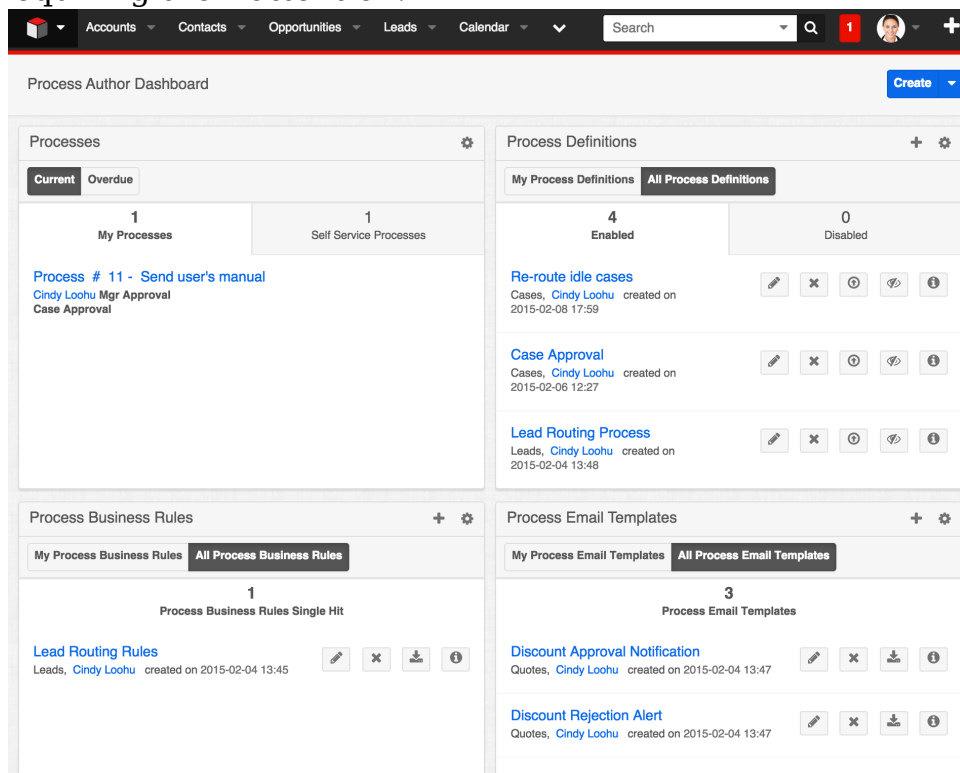
It is important to understand how all of the modules and elements of the Process Author suite will work together. Here is the best-practice chronology for automating business processes in Sugar using Process Author:

| Step # | Description | Explanation |
|--------|---|--|
| 1 | Create a Process Author Dashboard | <p>Before using Process Author for the first time, create a new dashboard specific to Process Author for easy, one-stop access to all automated business processes and their components.</p> |

| | | |
|---|---|---|
| 2 | Create and Configure a Process Business Rule | (optional) Create at least one Process Business Rule that will be used in a process definition. For example, automated lead assignments might require a process business rule to define which lead source values will be assigned to which user. |
| 3 | Create and Configure a Process Email Template | (optional) Prepare at least one Process Email Template for processes that require alerts or notifications. |
| 4 | Create and Configure a Process Definition | Using the Process Designer canvas, create the visual design of the overall business process that you want to automate. The process definition may make use of Process Business Rules and Process Email Templates created in previous steps. |
| 5 | Process Management | With all of the Process Author modules now working in harmony, administrators can navigate to the Process Management page to monitor process status, reassign or cancel an in-progress process, or repair processes in an error state. Users can monitor the Processes dashlet for activities that are queued or awaiting feedback. |

Creating a Process Author Dashboard

Before getting started, we recommend that the administrator user creates a Process Author-specific dashboard on their home page. This will allow the administrator to easily manage Process Definitions and their supporting modules all in one place. Regular users who may be engaged in running processes should place the [Processes dashlet](#) on their home pages to stay abreast of activities requiring their attention.

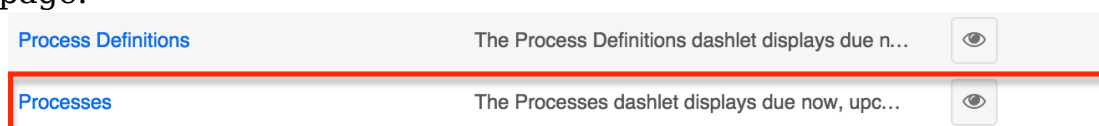


Processes Dashlet

This is the only Process Author dashlet available to regular users. It is important for all users who may be engaged in a process to place this dashlet on their home screens. Open, running processes and self-service processes waiting to be acted upon by the logged-in user will be listed in this dashlet.

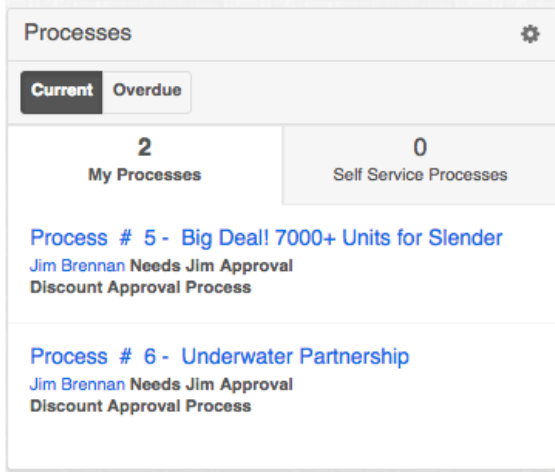
Note: Users (including administrators) will see only the processes that immediately require their attention.

To add a Processes dashlet, please refer to the [Adding Dashlets](#) section of the Intelligence Pane documentation, choosing "Processes" from the Add a Dashlet page.



After saving the dashlet and its containing dashboard, the dashlet will offer several

process-specific management tools:



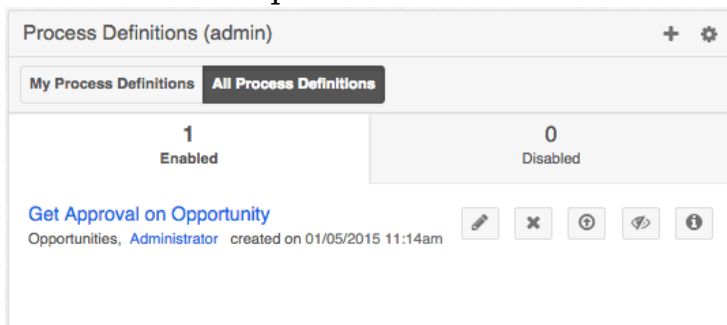
- **Current** : Click on this button to view all processes that are running within the expected timeframe.
- **Overdue** : Click on this button to view all processes that have a due date in the past. The label "Overdue" and the due date will be displayed adjacent to the process description.
- **My Processes** : Enable this tab to view the running processes upon which the logged-in user must act. Self-Service processes are not displayed here.
 - To execute a Process from the dashlet, click on the name of the process. Please note that admin users can not see processes running for other users via the dashlet. To access the system's exhaustive list of running and completed processes, refer to the [Process Management](#) section of this documentation.
- **Self Service Processes** : Enable this tab to view only the running processes in queue to be claimed by a user. Self-Service processes are configured inside the [User Activity](#) element settings of the related process definition.
- **Process Description** : Running processes are displayed in list view format with descriptive fields including the unique process number, the name of the affected Sugar record, the process title, the responsible user's name, and the label of the relevant process step.
- **Due Date** : When a due date exists, it will appear adjacent to the process description.

Process Definitions Dashlet

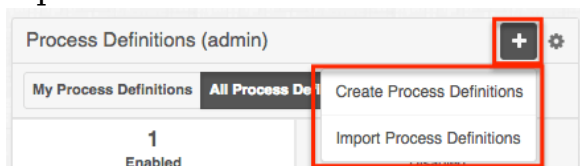
You must be an administrator user to add this dashlet to your home page. To add a Process Definitions dashlet, please refer to the [Adding Dashlets](#) section of the Intelligence Pane documentation, choosing "Process Definitions" from the Add a Dashlet page.

| | | |
|------------------------|---|--|
| Process Business Rules | The Process Business Rules dashlet displays due ... | |
| Process Definitions | The Process Definitions dashlet displays due now, ... | |
| Processes | The Processes dashlet displays due now, upcomin... | |

After saving the dashlet and its containing dashboard, the dashlet will offer several Process Author-specific administration tools:

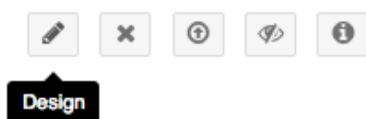


- **Actions Menu** : Click on the plus (+) icon to access the "Create Process Definitions" and "Import Process Definitions" options. Please note that imports for this module must have a .bpm file extension.



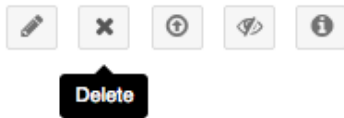
- **My Process Definitions** : Click on this button to list all process definitions created by the current admin user.
- **All Process Definitions** : Click on this button to list all process definitions created by any admin user.
- **Enabled** : Enable this tab to view a list of process definitions that are currently enabled in the system.
- **Disabled** : Enable this tab to view a list of process definitions that are currently disabled in the system. Disabling a process definition will prevent it from triggering new processes. Any running processes related to the disabled process definition will pause in an In-Progress state until the process definition is re-enabled.
- **Process Definition Shortcut Buttons**

- **Design** : Click on this icon to edit the process definition via the Visual Designer.

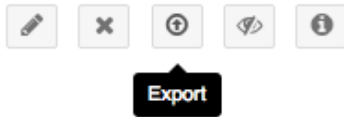


- **Delete** : Click on this icon to delete the adjacent process definition. A confirmation message will appear on the top of the screen; click "Confirm" to delete the process definition or click "Cancel" to close the

message without deleting.

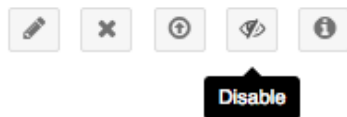


- Export : Click on this icon to export the process definition to a .bpm file.

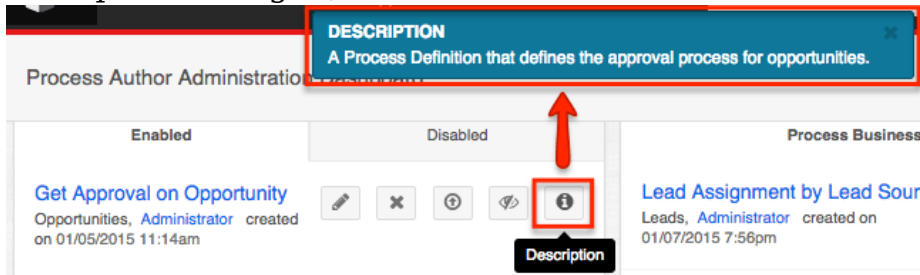


- Disable/Enable : Click on this icon to disable an active process definition or to enable an inactive one. Disabled process definitions will be listed in the "Disabled" tab.

- All process definitions are disabled by default and must be enabled by an administrator. For more information, please refer to [Enabling Process Definitions](#).
- Disabling a process definition will prevent it from triggering new processes. Any running processes related to the disabled process definition will pause in an In-Progress state until the process definition is re-enabled.

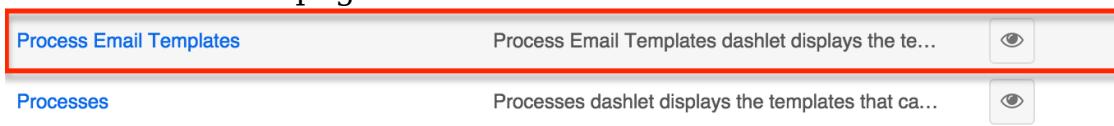


- Description : Click this icon to open a blue alert window that displays the admin-specified description of the process definition. To close the description dialogue, click on the x in the corner of the message.

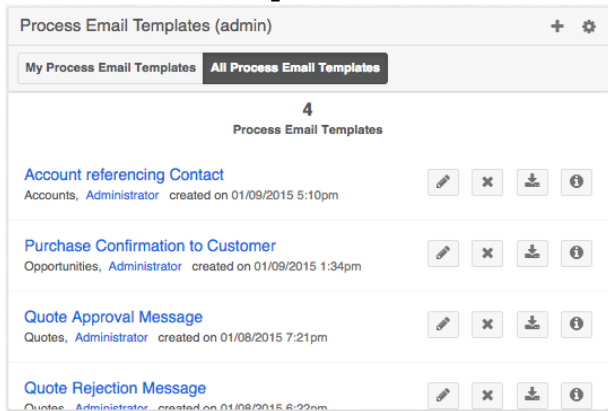


Process Email Templates Dashlet

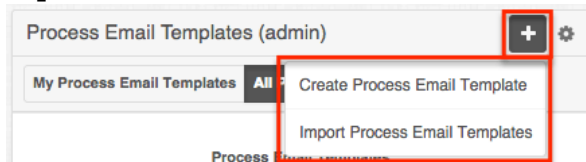
You must be an administrator user to add this dashlet to your home page. To add a Process Email Templates dashlet, please refer to the [Adding Dashlets](#) section of the Intelligence Pane documentation, choosing "Process Email Templates" from the Add a Dashlet page.



After saving the dashlet and its containing dashboard, the dashlet will offer several Process Author-specific administration tools:



- **Actions Menu** : Click on the plus (+) icon to access the "Create Process Email Template" and "Import Process Email Templates" options. Please note that imports for this module must have a .pet file extension.



- **My Process Email Templates** : Click on this button to list all email templates created by the current admin user.
- **All Process Email Templates** : Click on this button to list all email templates created by any admin user.
- **Process Email Template Shortcut Buttons**
 - **Edit** : Click on this icon to edit the template record from record view. It is then possible to access the template designer from the record view.



Edit

- **Delete** : Click on this icon to delete the adjacent email template. A confirmation message will appear on the top of the screen; click "Confirm" to delete the email template or click "Cancel" to close the message without deleting.



Delete

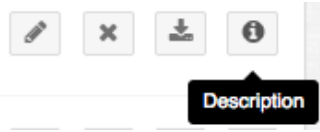
- **Export** : Click on this icon to export the process email template to a .pet file.



Export

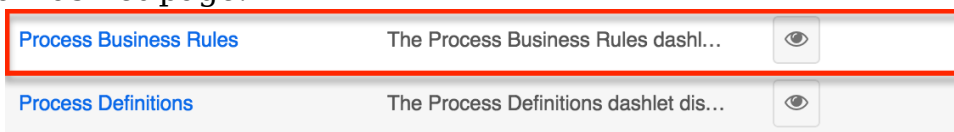
- **Description** : Click this icon to open a blue alert window that displays the

admin-specified description of the process email template. To close the description dialogue, click on the x in the corner of the message.

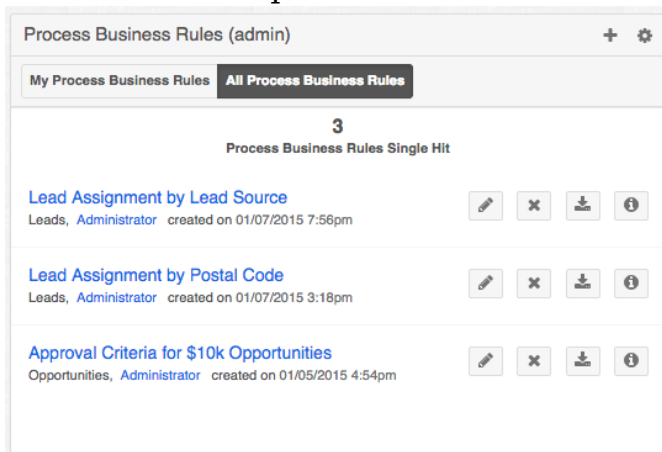


Process Business Rules Dashlet

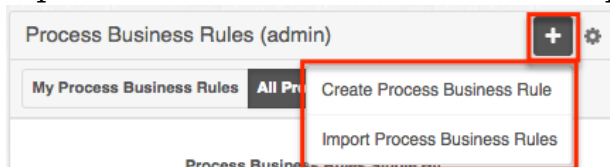
You must be an administrator user to add this dashlet to your home page. To add a Process Business Rules dashlet, please refer to the [Adding Dashlets](#) section of the Intelligence Pane documentation, choosing "Process Business Rules" from the Add a Dashlet page.



After saving the dashlet and its containing dashboard, the dashlet will offer several Process Author-specific administration tools:



- **Actions Menu** : Click on the plus (+) icon to access the "Create Process Business Rule" and "Import Process Business Rules" options. Please note that imports for this module must have a .pbr file extension.



- **My Process Business Rules** : Click on this button to view business rules created by the logged-in admin user.
- **All Process Business Rules** : Click on this button to view business rules created by any admin user.
- **Business Rules Shortcut Buttons**

- Edit : Click on this icon to edit the rule configuration from the Business Rules Builder interface.



Edit

- Delete : Click on this option to delete the adjacent business rule. A confirmation message will appear on the top of the screen; click "Confirm" to delete the process business rule or click "Cancel" to close the message without deleting.



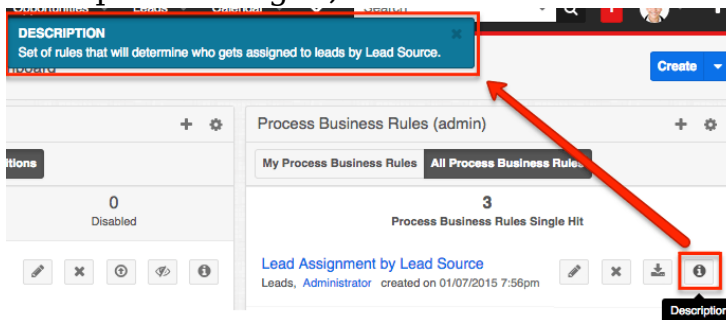
Delete

- Export : Click on this icon to export the process business rule to a .pbr file.



Export

- Description : Click this icon to open a blue alert window that displays the admin-specified description of the process business rule. To close the description dialogue, click on the x in the corner of the message.

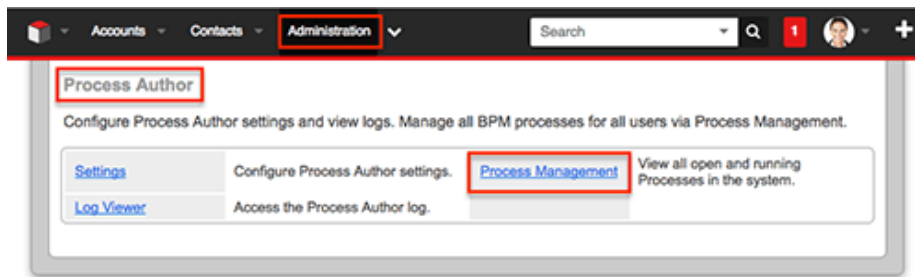


Process Management List View

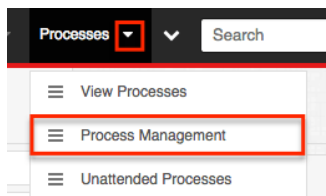
For processes, the admin user is restricted to the same access as a regular user in the Processes module. This means that in Processes list view and the Processes dashlet, the admin user will not see processes unless they have participated in that process or they are expected to participate in it.

The exhaustive list of open and completed processes is accessible only via the admin's Process Management page. This page can be accessed from two places in Sugar:

- Admin > Process Author > Process Management:



- The Processes module tab's actions menu:



The following columns are available from the Process Management page:

| Process Number | Process Definition Name | Record Name | Status | Date Created | Assigned To | Process User | Process Owner |
|----------------|-----------------------------|---------------------|-------------|------------------|-----------------------|-----------------------|-----------------------|
| 340 | Ignored Case Alert | test case | CANCELLED | 2015-03-27 19:30 | Jen Smith | | Jen Smith |
| 339 | tasks for use | HotelSeven Mar 27 | IN PROGRESS | 2015-03-27 17:00 | Anwesa Chatterjee | | Anwesa Chatterjee |
| 337 | Customer Onboarding Tasks | HotelSeven test 001 | ERROR | 2015-03-27 17:00 | Enrique Ponce De Leon | | Enrique Ponce De Leon |
| 336 | tasks for use | HotelSeven test 001 | COMPLETED | 2015-03-27 17:00 | Enrique Ponce De Leon | | Anwesa Chatterjee |
| 338 | Customer Success Tasks | HotelSeven test 001 | IN PROGRESS | 2015-03-27 17:00 | Enrique Ponce De Leon | Enrique Ponce De Leon | Enrique Ponce De Leon |
| 335 | Customer Stage Decide Tasks | HotelSeven test 001 | TERMINATED | 2015-03-27 16:56 | Enrique Ponce De Leon | | Anwesa Chatterjee |

- Process Number : Similar to a case number, this is a unique auto-increment number assigned to the process in the order it was triggered by the Process Author. This field is not related to the the Sugar system ID field.
- Process Definition Name : The name of the originating process definition that triggered the process.
- Record Name : The related Sugar module record to which the process applies.
- Date Created : The date and time that the process was triggered.
- Assigned To : The user who is assigned to the Sugar record that triggered the process's Start event.
- Process User : The user who is responsible for executing the current activity in a running process if a Route or Approval activity is running.
- Process Owner : The administrator who created the process definition (not necessarily affiliated with the running process).
- Status
 - **COMPLETED** COMPLETED : The process has successfully reached an end event and is no longer running.
 - **CANCELLED** CANCELLED : An administrator user has chosen to cancel this process.
 - **IN PROGRESS** IN PROGRESS : The process is currently open and running.
 - **TERMINATED** TERMINATED : The record that triggered the process has been deleted or merged.

- **ERROR** ERROR : The process has encountered a configuration problem and is paused.

Preview

Administrators can view the progression of a process within the overall flow directly from the Processes list view by clicking the Preview icon to the far right of each process list row. The process' visual design layout will display to the right of the list view providing key information regarding the stages that have already been completed, the current stage of the process, and the stages that have yet to execute.

The executed and in-progress stages of the process will be displayed in color, while skipped or not-yet-executed stages will be presented in a grayed out style.

The screenshot shows the 'Process Management' interface. On the left is a table of processes, and on the right is a 'Preview' pane. A red box highlights the 'Preview' pane, and a red arrow points to the 'Process design Preview' diagram. The diagram shows a flowchart with various steps and decision points. The status of the record in the table is 'ERROR'.

| Process Number | Process Definition Name | Record Name | Status | Date Created |
|----------------|---------------------------|----------------------|-------------|------------------|
| 13 | Re-route idle cases | Warning message ... | IN PROGRESS | 2015-02-08 15:27 |
| 12 | Re-route idle cases | Warning message ... | IN PROGRESS | 2015-02-08 15:08 |
| 6 | Discount Approval Proc... | Underwater Partne... | ERROR | 2015-02-04 20:42 |
| 15 | Re-route idle cases | System not respon... | IN PROGRESS | 2015-02-08 15:28 |
| 11 | Case Approval | Send user's manual | IN PROGRESS | 2015-02-06 15:23 |
| 3 | Discount Approval Proc... | Process Quote | ERROR | 2015-02-04 19:56 |
| 10 | Case Approval | Needs spare parts | IN PROGRESS | 2015-02-06 15:22 |

Note: To view the process design layout in more detail, simply click on the Process Design Preview image to open a full-sized version of the flow in a new browser tab.

On the upper right of the intelligence pane, there is a Left and Right arrow button that allows you to scroll through the list view's current search results by previewing the next or previous record. To close the preview, simply click the "X" on the upper right of the intelligence pane.

Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to view vital process information, re-direct processes, and navigate to the process execution screen directly from the list view.

- History : The History option appears in the record's Actions menu and provides a historical summary of the process's lifecycle.

| Process Id | Process Definition Name | Record Name | Status | Date Created | |
|------------|---------------------------|-----------------|--------------------|--------------|---------|
| 1 | Get Approval on Opport... | 10 Big Systems | IN PROGRESS | 01/19/2015 | ⓘ ▼ |
| 2 | Lead Routing Process | Ms. Lana Turner | ERROR | | History |

Click on "History" to launch the Process History window:

3: Process History

- Administrator** has created the Process # 3 of Module aCase with the Event named: 'Start Event # 1', (33 minutes ago) ✓
2015-06-02 11:06
- Process Author** has been assigned the TaskId 3d0e3e48-0c8b-643a-29a0-556dc0b5c0bf (33 minutes ago) ✓
2015-06-02 11:06
- Jim Brennan** has been assigned the TaskId 6449c59c-6bf3-7f0a-1d02-556dc00d6409 named: 'Activity # 1' of Module aCase (task has been created) , The action performed was: [ROUTE] (24 minutes ago) ✓
2015-06-02 11:14
- Process Author** has been assigned the TaskId 4823691f-9a6f-d4e0-9d77-556dc01de9ad (24 minutes ago) ✓
2015-06-02 11:14
- Process Author** has been assigned the TaskId 70fa7fa5-1c3d-7d77-b0d4-556c7fd60635 of Module aCase with the Event named: 'End Event # 1', (24 minutes ago) ✓
2015-06-02 11:14

- Select New Process User : The Select New Process User option appears in the record's Actions menu and will display all of the process users who have engaged with the process, and will allow the administrator to select a new process user to execute the current activity.

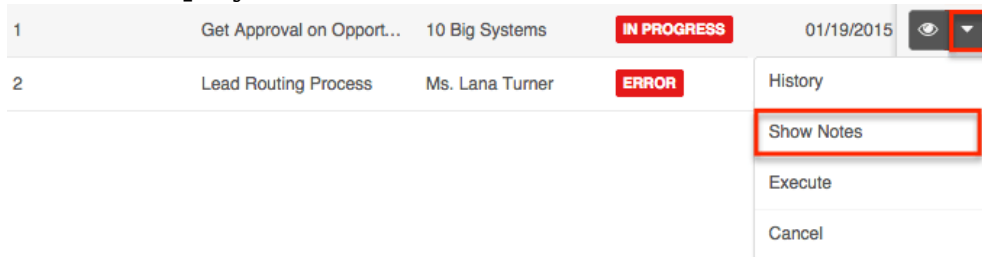
| Process Number | Process Definition Name | Record Name | Status | Date Created | |
|----------------|-------------------------|---------------|--------------------|--------------|-----|
| 1 | Assign Leads | Skippy Peanut | IN PROGRESS | 2015-04-30 2 | ⓘ ▼ |

To reassign the process, choose "Select New Process User" from the Actions menu. A drawer will open. Select a new value for the "Process User" field and then click "Done".

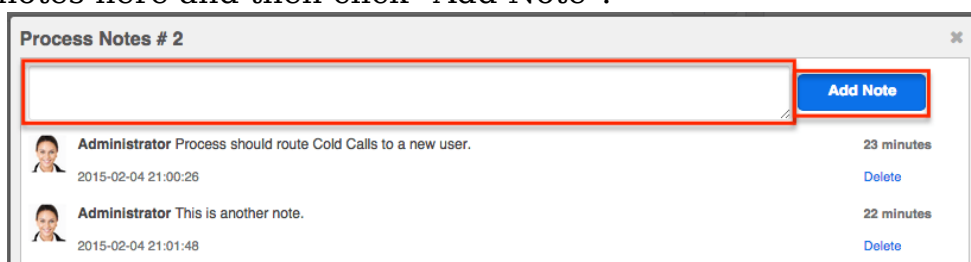
Select New Process User Cancel Done

| Current Activity | Activity Delegate ... | Expected Time | Due Date | Process User |
|------------------|-----------------------|---------------|---------------------|------------------|
| Activity # 1 | 2015-04-30 23:50... | | 2015-05-01 23:50... | Administr... x ▼ |

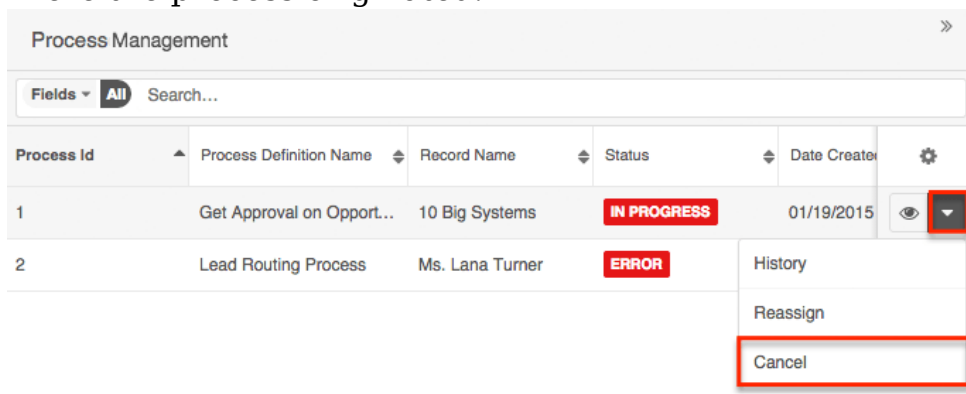
- **Show Notes** : The Show Notes option appears in the record's Actions menu and will display comments.



Click on "Show Notes" and a new dialog window will appear. Type in any notes here and then click "Add Note".



- **Cancel** : The Cancel option appears in the record's Actions menu and will delete the specific process without affecting the process definition from where the process originated.



Searching Processes

The Process Management list view includes a module search to help you locate running, completed, and incomplete processes easily and effectively. Once the search is performed, the relevant results will be displayed in the list view below.

Unlike the standard Sugar module search bar filter, the Process Management search bar will query all Process fields by default. This means that a search for "error" will return processes named "Approve Error Resolution" and processes that affect a record named "Customer receives error when logging in" and even processes that are in an "Error" status.

Please note that on the Process Management page, Sugar automatically assumes a

wildcard character (%) at both the beginning and the end of your search phrase. Therefore, the search for "error" will pull up any record that has the word "error" in the name, regardless of how it starts or ends.

The screenshot shows a search for 'error' in the Process Management module. The search bar contains 'error' and is highlighted with a red box. The results table shows three records:

| Process Number | Process Definition Name | Record Name | Status | Date Created | Assigned User |
|----------------|---------------------------|-----------------------------------|-------------|------------------|---------------|
| 18 | Approve Error Resolution | 5000 Unit Sale | IN PROGRESS | 2015-02-10 13:07 | Loohu |
| 6 | Discount Approval Process | Underwater Partnership | ERROR | 2015-02-04 20:42 | Loohu |
| 4 | Discount Approval Process | Customer receives error when I... | IN PROGRESS | 2015-02-04 20:15 | Loohu |

The search also provides a Filter option that can be used in combination with the open Search box to narrow your search further using the available options as follows:

- All : Returns all processes.
- Processes Completed : Returns only processes with a status of "Completed".
- Processes Terminated : Returns only processes with a status of "Terminated".
- Processes In Progress : Returns only processes with a status of "In Progress".
- Processes Cancelled : Returns only processes with a status of "Cancelled".
- Processes Error : Returns only processes with a status of "Error".

The screenshot shows the filter dropdown menu in the Process Management module. The 'All' filter is selected and highlighted with a red box. The search bar contains 'Search...'. The results table shows several records with different statuses:

| Process Definition Name | Record Name | Status | Date Created | Assigned User |
|-------------------------|-------------------------|-------------|------------------|---------------|
| route idle cases | Having trouble addin... | IN PROGRESS | 2015-02-08 17:11 | Loohu |
| route idle cases | Having trouble addin... | COMPLETED | 2015-02-08 15:35 | Loohu |
| route idle cases | System not responding | IN PROGRESS | 2015-02-08 15:28 | Loohu |
| route idle cases | Need assistance wit... | IN PROGRESS | 2015-02-08 15:28 | Loohu |
| route idle cases | Warning message w... | IN PROGRESS | 2015-02-08 15:27 | Loohu |
| route idle cases | Warning message w... | IN PROGRESS | 2015-02-08 15:28 | Loohu |

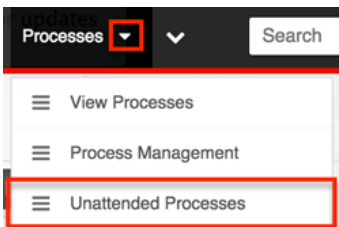
When you choose a filter, Sugar will return processes that match both the selected filter and any name provided in the "Search..." bar in the filtered list view results. For example, if you select "Processes Completed" in the Filter options and enter a search query, Sugar will only return processes that contain a match to the search query and have a Completed status. To see all processes, simply select "All" in the filter and remove any text from the search bar. You can also click the X that appears within the search bar. When you run a search using a saved filter, the search will not be preserved when you navigate away from the module. Returning to the Process Management page will automatically display all unfiltered results.

Unattended Processes

An unattended process is a running process instance that has been interrupted because an activity is dependent upon the response of an inactive or deleted user. If an activity is encountered within a process, and the activity's process user record's status is "Deleted" or "Inactive" or its employee status is "Not Active", the process will be considered unattended. The activity cannot be completed unless the administrator designates a new process user.

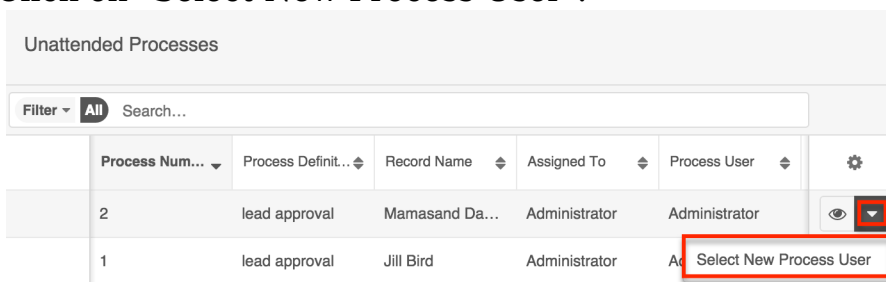
Note: While an unattended process will also appear in the [Process Management](#) list, its status will remain "In Progress" and will not indicate that it is in an unattended state.

The list of unattended processes is accessible via the admin's Unattended Processes page. This page can only be accessed from the Processes module tab's actions menu:

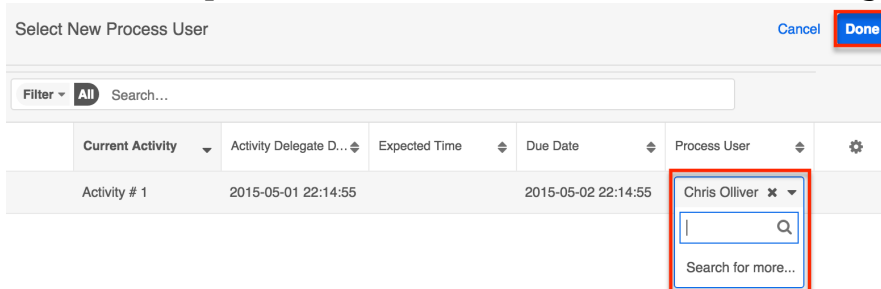


To select a new process user for an unattended process, follow these steps:

1. From the Unattended Processes list view, expand the actions menu for the row that contains the unattended process.
2. Click on "Select New Process User".



3. After a brief pause, the Select New Process User widget will appear.



4. Find and select the name of the new process user and then click Done.

The updated process should no longer be visible in the Unattended Processes list, and the new process user will see the activity in their Processes dashlet and list view.

Terminated vs. Cancelled Processes

Process Author automatically terminates a process when the record related to the process' Start event is deleted. The associated process will be removed from the Processes dashlet and the process record will display "Terminated" in the Status column of the Process Management list view. Processes may also be terminated as a result of meeting conditions specified in the Process Termination settings. For more information, please refer to the [Configuring Process Termination Settings](#) section of the Process Definition documentation.

Cancelled processes, on the other hand, have been intentionally stopped by the administrator. The associated process will be removed from the Processes dashlet and the process record will display "Cancelled" in the Status column of the Process Management list view.

Importing and Exporting Process Author Module Records

Sugar Process Author supports import/export functionality for records in all modules except the Processes module, which only contains running instances of process definitions. To import records into the Process Definitions, Process Email Templates, or Process Business Rules modules, the import file must be formatted as the appropriate proprietary file type, as shown in the table below. All exported records will download as the corresponding file type.

| Process Author Module | Supported File Extension |
|-------------------------|--------------------------|
| Process Definitions | .bpm |
| Process Email Templates | .pet |
| Process Business Rules | .pbr |

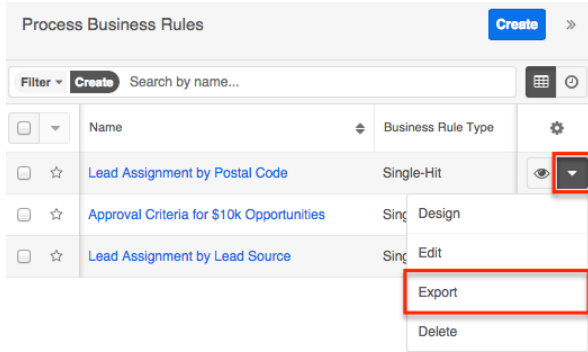
Due to the proprietary nature of these file types, only files that have been exported from a Sugar instance can be imported into a Sugar instance. For example, an administrator may choose to design process definitions in a sandbox or development instance before moving them to a production environment. For this, the files would be exported from the dev instance as .bpm files and then imported into the production instance's Process Definitions module.

Note: Process Definitions may contain references to Business Rules and Email Templates. These references are lost when the Process Definition is imported. Even if the Business Rules and Email Templates are imported prior to importing

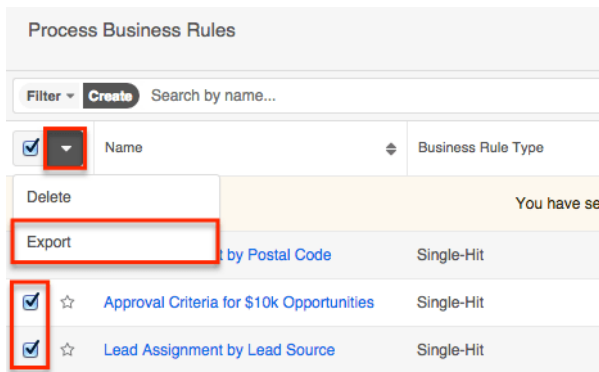
the Process Definition, the references are not automatically reestablished in the imported Process Definition. They must be reestablished manually.

Process Author module records can be exported from any of the following locations:

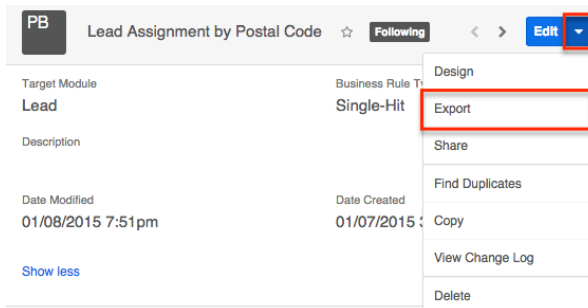
- The individual module record's list view Actions menu:



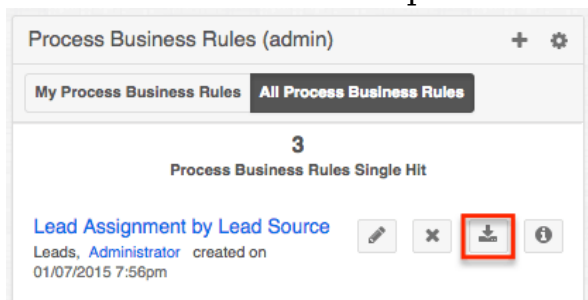
- The relevant module's list view Actions menu:



- The individual module record's record view Actions menu:

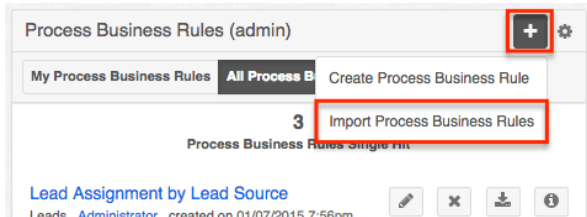


- The relevant dashlet's Export button adjacent to the individual record:

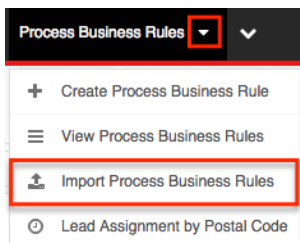


Process Author module records can be imported via either of the following locations:

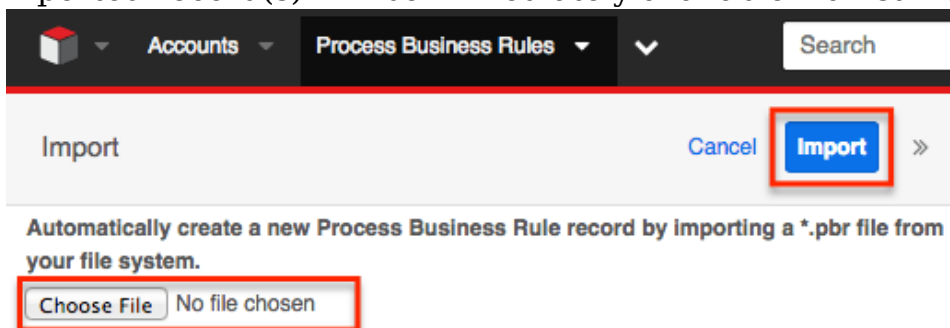
- The Actions menu on the relevant module's dashlet:



- The relevant module tab's Actions menu:



After clicking "Import [Process Module Name]", you will be prompted to find the import file on your local drive. Click "Choose File" and select the file with the appropriate file extension, and then click "Import" to finish. A green banner will momentarily appear on the screen to indicate that the import was successful. The imported record(s) will be immediately available via list view and dashlet.



Process Author Settings

To configure Process Author settings, navigate to the Admin page, then select "Settings" under the Process Author panel.

Process Author

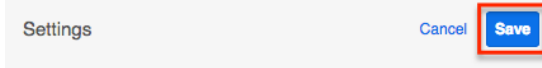
Configure Process Author settings and view logs. Manage all BPM processes for all users via Process Management.



Administrators will be automatically directed to the Process Author setting:

- Error Number of Cycles : Specify how many times a process can loop before the system stops the process definition.

By default, this is set to 10. Please note that increasing the number of cycles could negatively affect performance.



Error Number of Cycles

Process Author Log Viewer

Administrators and developers can gain insight into the performance of the Process Author engine by viewing the Process Author log. To access the Process Author Log Viewer, navigate to the Admin page and click "Log Viewer" under the Process Author panel.

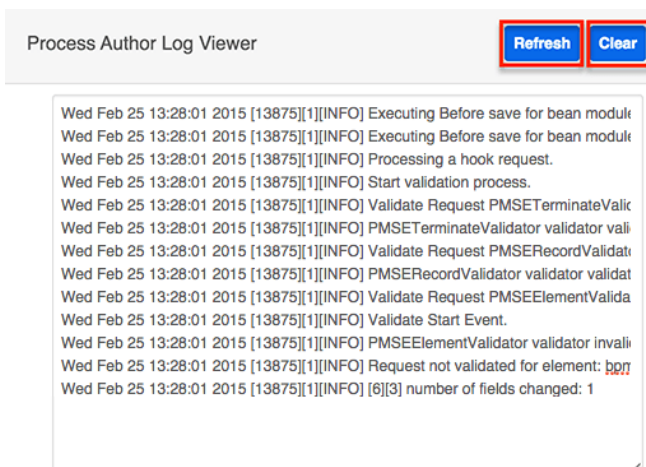
Process Author

Configure Process Author settings and view logs. Manage all BPM processes for all users via Process Management.



There are two options on the Log Viewer page:

- Refresh : Refreshes the log view, loading the last records.
- Clear : Permanently deletes all log history. This cannot be undone.



The log level is set to Critical, which is equivalent to Sugar's Fatal log level, and starts recording events as soon as Process Author has been installed. A developer can update the system config.php to change Process Author settings including "logger_level", "error_number_of_cycles", and "error_timeout". Changes that are made to config.php are honored in real time.

Process Author Scheduler

Schedulers in Sugar automate the execution of system processes. Schedulers are available only to administrative users and can be accessed by navigating to Admin > Schedulers. Process Author Scheduled Job is responsible for processes associated with Process Author. It is active and runs as often as possible by default. The Process Author Scheduled Job will check for any active time-based process events (i.e. Wait events, Send Message events, and Receive Message events) in a pending state. If any processes meet this criterion, the scheduler will ensure the process flow continues.

For more information about Sugar schedulers, please refer to the [Schedulers](#) documentation. For more information on troubleshooting the Process Author Scheduled Job, please refer to the [Troubleshooting Wait Events in Advanced Workflow](#) article.

Note: Process events processed by this scheduler will be run by the admin user (user id = '1') in Process History unless the admin user is disabled.

Last Modified: 01/24/2017 04:51pm

Process Business Rules

Overview

The Process Business Rules module is one of four modules that make up [Sugar Process Author™](#), a business process management tool which enables administrators to streamline common business processes by managing approvals, sales processes, call triaging, and more. The Process Business Rules module is used to create reusable rules that will be referenced by records created in the [Process Definitions](#) module. The rule or set of rules may enforce business policy, make a decision, or infer new data from existing data.

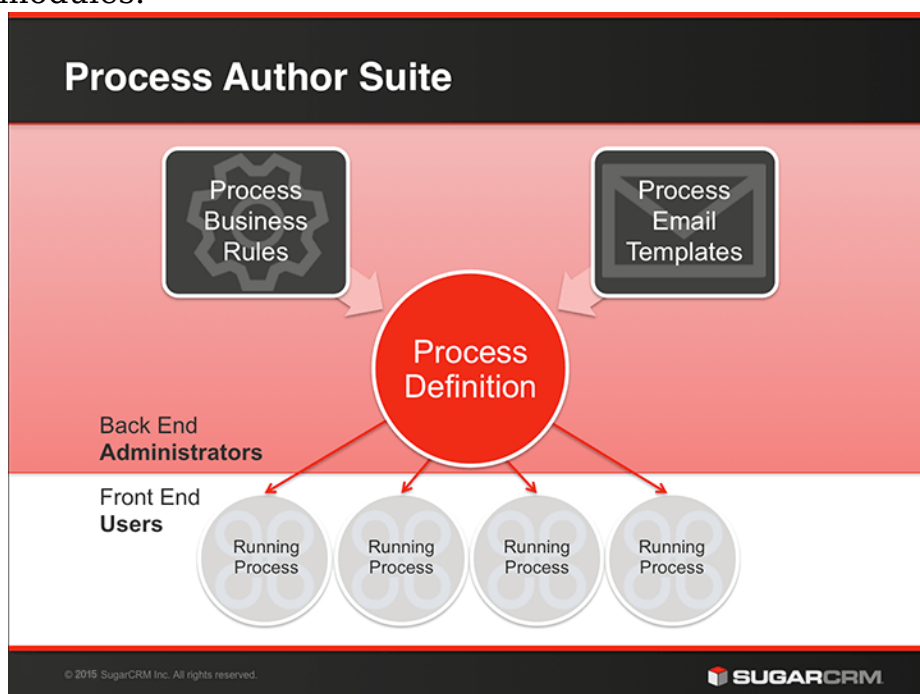
Before continuing, please read the [Process Author](#) overview page, which defines critical vocabulary and other elements that may be referenced in this article.

This documentation contains the following pages:

- [Process Author](#)
- [Process Definitions](#)
- Process Business Rules (current page)
- [Process Email Templates](#)

Additionally, the [Processes](#) page of the Application Guide contains documentation for the user-facing elements of Sugar Process Author. Please note that Process Author is exclusive to Enterprise and Ultimate editions of Sugar 7.6.x and later.

The following image illustrates the relationship between all of the Process Author modules:



Process Business Rule Fields

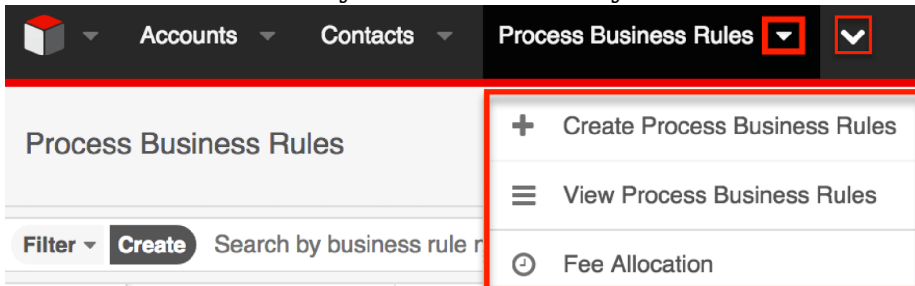
The Process Business Rules module contains the following fields:

| Field | Description |
|--------------------|--|
| Assigned To | The Sugar user assigned to the process business rule |
| Business Rule Type | Specifies how a rule set will be evaluated. This field defaults to "Single Hit", meaning that each row will be evaluated independently in descending |

| | |
|---------------|--|
| | order. When a rule in the rule set evaluates as true, the evaluation process stops and that rule's conclusions are executed. |
| Date Created | The date the process definition record was created |
| Date Modified | The date the process definition record or its design was last modified |
| Description | A description or other information about the process definition |
| Name | A unique and descriptive name |
| Target Module | The module that will be used for the Start event in the process definition design |

The Process Business Rules Module Tab

The Process Business Rules module tab is located on the navigation bar at the top of the Sugar screen when the administrator is engaging with the Process Business Rules module. Click the tab to access the Process Business Rules list view. You may also click the triangle in the Process Business Rules 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 business rules you last viewed in the module. The Favorites menu displays the list of business rules you most recently marked as favorites in the module.



The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|-------------------------------|--|
| Create Process Business Rules | Opens the record view layout to create a new process rule |
| View Process Business Rules | Opens the list view layout to search and display process rules |

If you do not see the Process Business Rules module tab in Sugar, please check the

following:

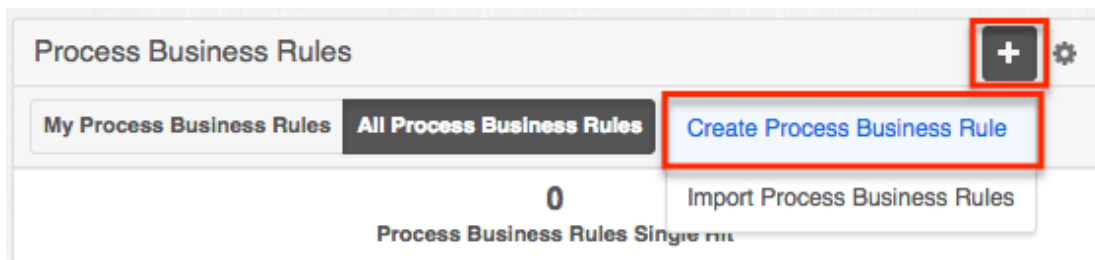
- You must be an administrator user to access the Process Business Rules module or the Process Business Rules module tab.
- The Process Business Rules module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right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

Creating Process Business Rules

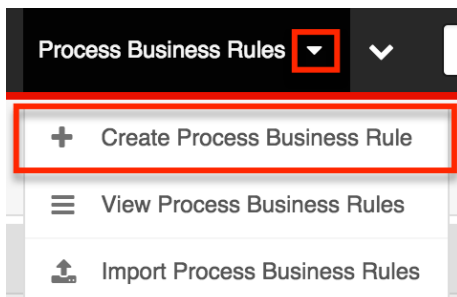
You should typically create business rules before creating any process definitions that will use the rules. However, it is possible to save an incomplete process definition in order to navigate away and build a rule, then return later to complete the process definition.

Process business rules can be created from any of the following places in Sugar:

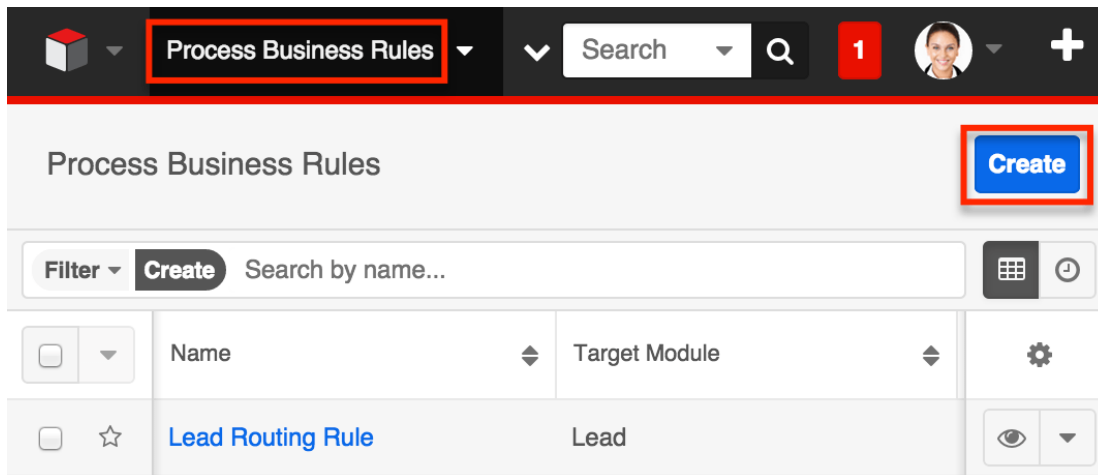
- Process Business Rules dashlet:



- Process Business Rules module tab menu:



- Process Business Rules list view:



Upon clicking "Create Process Business Rule" (or the Create button from list view), you will be directed to the record view. The record view is where you store information that will make it easy to find and understand the rule in the future. After completing this form, you will then be directed to the [Rules Builder](#) interface where the actual rule criteria and outcomes are defined.

For more information about the available fields in the Process Business Rules module, please refer to the [Process Business Rule Fields](#) section of this documentation. After configuring and saving the Process Business Rule it will automatically appear on the administrator's Process Business Rules dashlet and list view, but it will not be ready to use in a Process Definition until the design step has been completed via the Rules Builder.

Designing a Process Business Rule in the Rules Builder

After saving the process business rule record, define the conditions and conclusions that the rule will evaluate and execute using the Rules Builder table.

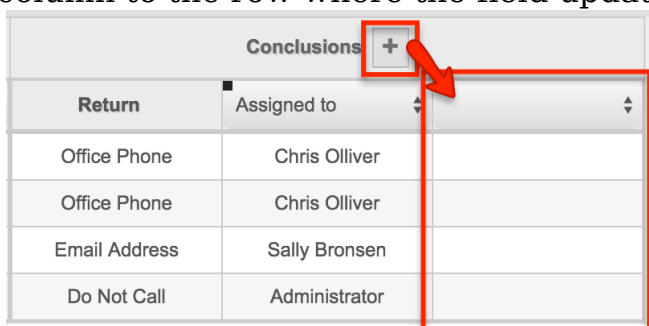
Note: The Rules Builder interface may not be compatible with some touch-screen mobile devices. Please interact with the Rules Builder from a desktop or laptop computer to prevent any potential complications.

Condition and Conclusion Elements

Process business rules are comprised of at least one condition:conclusion element.

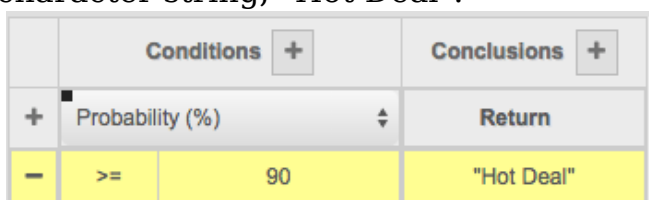
- Conditions : One or more "if" statements that will be evaluated as true or false.
- Conclusions : The results that are returned if the condition evaluates to true.

By default, a true condition must result in a Return value. The Return value can be constructed using variables, constants, operators and/or literal values. If there are to be multiple outcomes to the condition, the Return value must be specified as the first conclusion in the business rule. For example, to change the value of a given field when the condition is true, set an arbitrary return value and then click on the + button adjacent to the table header "Conclusions" to add another conclusion column to the row where the field update can be defined.



| Conclusions + | |
|---------------|---------------|
| Return | Assigned to |
| Office Phone | Chris Olliver |
| Office Phone | Chris Olliver |
| Email Address | Sally Bronsen |
| Do Not Call | Administrator |

The condition will evaluate a set of given variables and if the condition is evaluated as "true", the conclusion will then return a specified value. In the following example, an Opportunity with a probability of 90% or more will return the character string, "Hot Deal".



| Conditions + | | Conclusions + | |
|-------------------|-------------|---------------|--|
| | Assigned to | Return | |
| + Probability (%) | Assigned to | | |
| - >= | 90 | "Hot Deal" | |

Note: Process business rule "Return Values" will always convert to text for evaluation within a process definition.

Operators

Conditions utilize comparison operators. Multiple conditions in a single row will be combined using AND logic, requiring all conditions in a row to be satisfied in order for the statement to be evaluated as true. The available operators are:

| Operator | Definition | Available for Field Types |
|----------|-----------------------------|--|
| == | is equal to | text, currency, integer, date, dropdown, multiselect |
| >= | is greater than or equal to | integer, currency, date |
| <= | is less than or equal to | integer, currency, date |
| > | is greater than | integer, currency, date |
| < | is less than | integer, currency, date |
| != | is not equal to | text, integer, currency, date, dropdown, multiselect |

Note: If using a currency field in a business rule, values should have no currency symbol (such as \$) and no thousands separator. Only the period (.) is allowed as a decimal separator.

Rule Sets

A single process business rule record could potentially define a set of several rules, or a rule set. In the following example of a set of rules for routing leads, each row of the Rules Builder table represents a separate rule that will be evaluated by the process. Each row is evaluated independently in descending order. When a rule in the rule set is evaluated as true, the evaluation process stops. Therefore, only the conclusions defined by the first (topmost) true condition will be returned.

The following example represents a rule set that evaluates the fields "Lead Score" and "Lead Source" to determine a return value and assigned user. The first row translates conversationally to: If the lead's score is greater than or equal to 50, and the lead's source is a Cold Call, then capture the office phone number and assign the lead to Chris Olliver.

| Lead Routing Rule * | | | | | Leads | |
|---------------------|------------|----------|-------|------------------|---------------|---------------|
| Conditions + | | | | | Conclusions + | |
| + ■ | Lead Score | Operator | Value | Lead Source | Return | Assigned to |
| - | >= | 50 | == | Cold Call | Office Phone | Chris Olliver |
| - | >= | 50 | == | Public Relations | Office Phone | Chris Olliver |
| - | >= | 50 | == | Email | Email Address | Sally Bronsen |
| - | <= | 49 | | | Do Not Call | Administrator |

The Rules Builder User Interface

| Lead Routing Rule * | | | | | Leads | |
|---------------------|-------------|----------|-------|------------------|---------------|---------------|
| Conditions + | | | | | Conclusions + | |
| + ■ | Lead Source | Operator | Value | Return | Assigned to | |
| - | >= | 50 | == | Cold Call | Office Phone | Chris Olliver |
| - | >= | 50 | == | Public Relations | Office Phone | Chris Olliver |

Note: Red callouts in the original image point to: 'Add Column' (Conditions header), 'Add Row' (plus icon), 'Remove Row' (minus icon), and 'Remove Column' (small square icon).

- Click the plus (+) icon to the right of the Conditions header to add additional condition columns.
- Click the plus (+) icon to the right of the Conclusions header to add additional conclusion columns.
- Click the plus (+) icon to the far left of the column headers to add additional rows and create a rule set.
- Click the minus (-) icon next to a single row to remove that entire row.
- Click the small black square (■) in the corner of a column header to remove that entire column.

Note: All conditions defined within the same row must be met in order to trigger the associated conclusion. In addition, when any one row has satisfied all of its conditions, its conclusion will be triggered and no subsequent rows will be evaluated.

1. For each column header under the Conditions section, select a field variable (e.g. Lead Source) by clicking on the empty cell.
2. Select the operator needed to evaluate each variable. To change the operator, click on the cell to view and select the available operators in the list.

| + | | Lead Source | Birthdate |
|---|----|-------------|-----------|
| - | == | Cold Call | <= |
| - | == | Trade Show | ✓ |
| - | == | Conference | |

- To the right of the operators, select the field value for the condition that must be met. Click on the cell to select a field value or access the criteria builder where you can define constants, fields, etc.

| Lead Source | Birthdate | Return |
|-------------|------------|--------|
| == | Cold Call | <= 18y |
| == | Trade Show | 18y |
| == | Conference | |

- For the Return column, define the return value for when the process business rule's condition evaluates as true. A process definition will evaluate the returned values in Gateways and react accordingly. You can add additional columns (e.g. Assigned to) if you wish to specify other behaviors.

For information about utilizing process business rules in process definitions, refer to the [Actions > Business Rule](#) section of the Process Definitions documentation.

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

Process Email Templates

Overview

The Process Email Templates module is one of four modules that make up [Sugar Process Author™](#), the business process management tool in Sugar which enables administrators to streamline common business processes by managing approvals, sales processes, call triaging, and more. A process email template is required in order to include a Send Message event in a [process definition](#). Sugar's core product includes several places where email templates can be created for different purposes, but Process Author requires all sent messages to be created via the

Process Email Templates module.

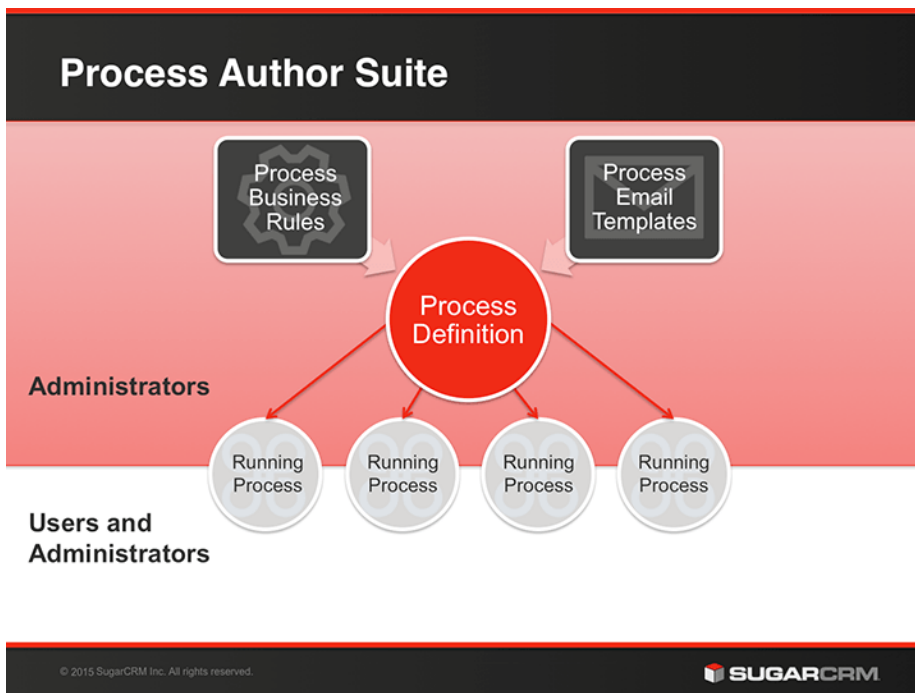
Before continuing, please read the [Process Author](#) overview page, which defines critical vocabulary and other elements that may be referenced in this article.

This documentation contains the following pages:

- [Process Author](#)
- [Process Definitions](#)
- [Process Business Rules](#)
- Process Email Templates (current page)

Additionally, the [Processes](#) page of the Application Guide contains documentation for the user-facing elements of Sugar Process Author. Please note that Process Author is exclusive to Enterprise and Ultimate editions of Sugar 7.6.x and later.

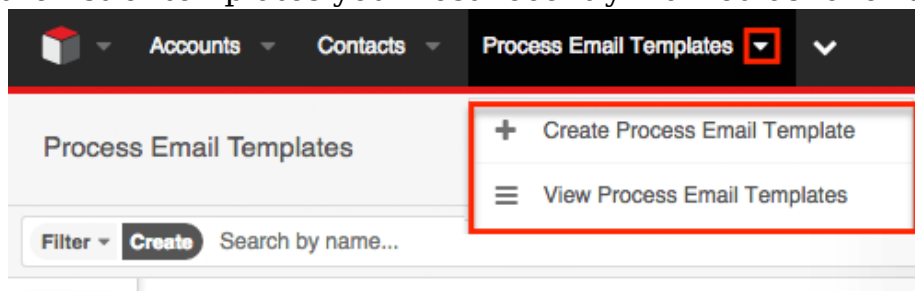
The following image illustrates the relationship between the four Process Author modules:



The Process Email Template Module Tab

The Process Email Templates module tab is located on the navigation bar at the top of the Sugar screen when the administrator is engaging with the Process Email Templates module. Click the tab to access the Process Email Templates list view. You may also click the triangle in the Process Email Templates 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 templates you last viewed in the module. The Favorites menu displays the list of templates you most recently marked as favorites in the module.



The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|-------------------------------|---|
| Create Process Email Template | Opens the record view layout to create a new email template |
| View Process Email Templates | Opens the list view layout to search and display email template |

If you do not see the Process Email Templates module tab in Sugar, please check the following:

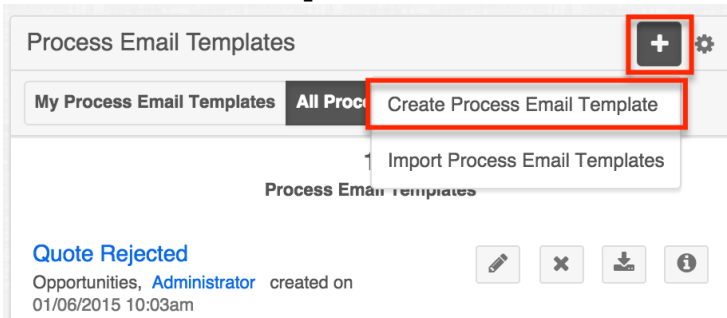
- You must be an administrator user to access the Process Email Templates module or the Process Email Templates module tab.
- The Process Email Templates module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper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

Creating Process Email Template Records

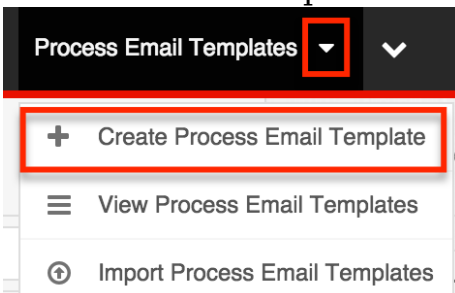
You should typically create email templates before creating any process definitions that will use the templates. However, it is possible to save an incomplete process definition in order to navigate away and build an email template, then return later to complete the process definition.

Process email templates can be created from any of the following places in Sugar:

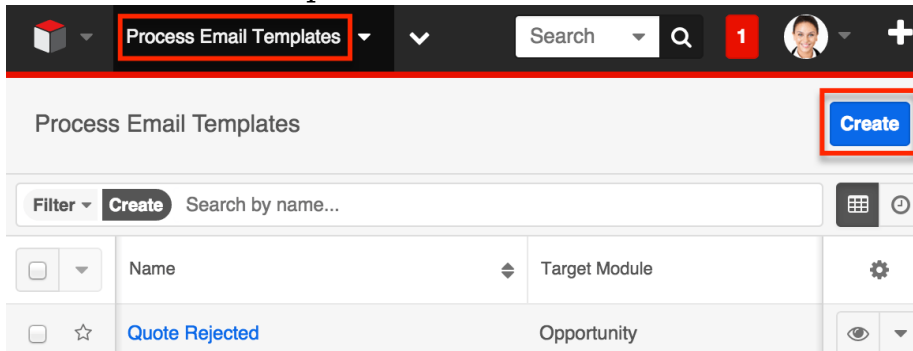
- Process Email Templates dashlet:



- Process Email Templates module tab menu:



- Process Email Templates list view:



Upon clicking "Create Process Email Template" (or the Create button from list view), you will be directed to the record view. The record view is where you store information that will make it easy to find and understand the purpose of the email template in the future. After completing this form, you will then be directed to the

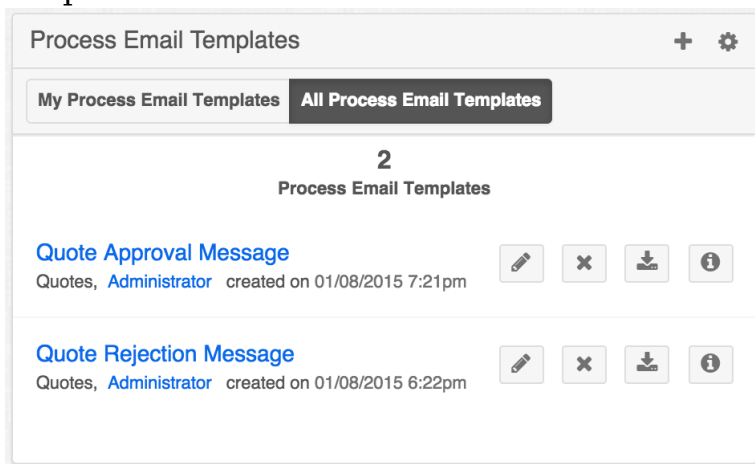
PE Name Cancel >>

Target Module

Description

-
- Name : (required) Give the template a unique and descriptive name. Clear, descriptive, and unique record names will be important in order to search for and re-use templates across multiple Process Definitions.
 - Target Module : (required) Select the module that will be the source of any field variables that may be displayed on the template.
 - Description : Type an explanation of the process email template in this field.
 - Save and Design : Saves the record and redirects to the template's design view.

After configuring and saving the process email template it will automatically appear on the administrator's Process Email Templates dashlet and list view, but it will not be ready to use in a Process Definition until the design step has been completed.



Designing a Process Email Template from Design View

After submitting the template's record view, you must create the custom layout and design of the message that will be sent by related process definitions. Click "Save & Design" in record view to automatically enter the Process Email Template's design view. The field values for Target Module, Name, and Description are automatically pre-populated on this screen based on the values entered on the record view.

Process Email Templates | Quote Approval Message Cancel Save Save & Exit

Target Module: **Quotes**

Name:

Description:

Subject:

<> | **B** | *I* | U | ~~S~~ |
 |
 |
 A | |
 Font Size |

Sugar Process Author's template design interface is an easy to use WYSIWYG editor. The two elements available in the design view that cannot be accessed from record view are the design toolbar and the message body.


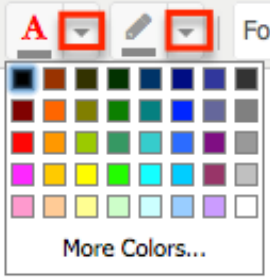
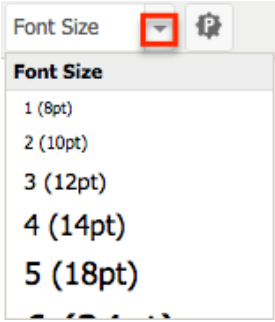

<> | **B** | *I* | U | ~~S~~ |
 |
 |
 A | |
 Font Size |

This is the message body, just under the designer toolbar. Hello world!

The Design Toolbar

The toolbar is powered by the TinyMCE rich-text editor framework and presents familiar formatting options:

| Element | Button(s) | Function |
|--|-----------|--|
| Edit HTML Source | | Bypass the rich-text editor options and insert your own HTML code, or view the HTML code of an existing template to make advanced changes. |
| Bold; Italic; Underline; Strikethrough | | Use these basic font formatting options to easily add common styles to text in the message body. |
| Insert/Remove Bulleted List; Insert/Remove Numbered List | | Transform paragraphs in the message body into a formatted list. |

| | | |
|---|--|--|
| Align Left; Align Center; Align Right; Align Full |  | Set paragraph alignment. |
| Text Color; Background Color |  | Choose a custom font color or highlight text with a background font color. |
| Font Size |  | Make text larger or smaller. |
| Field Selector |  | Look up and insert Sugar module field variables. For more information, see the |

Using the Field Selector Tool to Insert Custom Variables

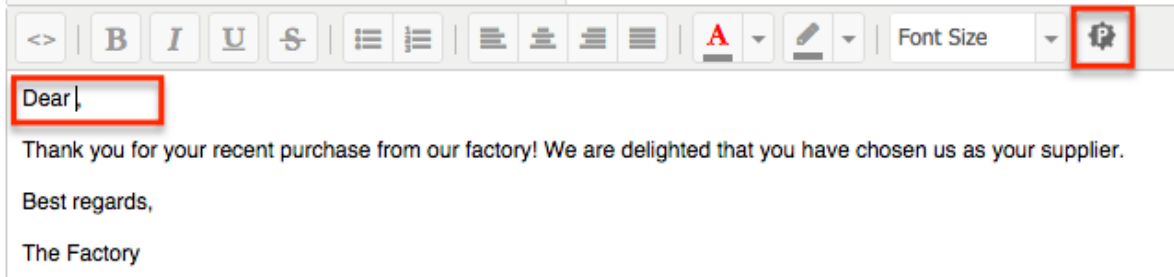
Process Email Templates can be customized using data pulled directly from your Sugar database. For example, an email template triggered from the Cases module could contain critical case details such as the support agent's name or the phone number of the contact related to the case.

Note: Related-module variables will only be available from modules that have a one-to-many relationship with the target module. For example, where the template's target module is Opportunities:

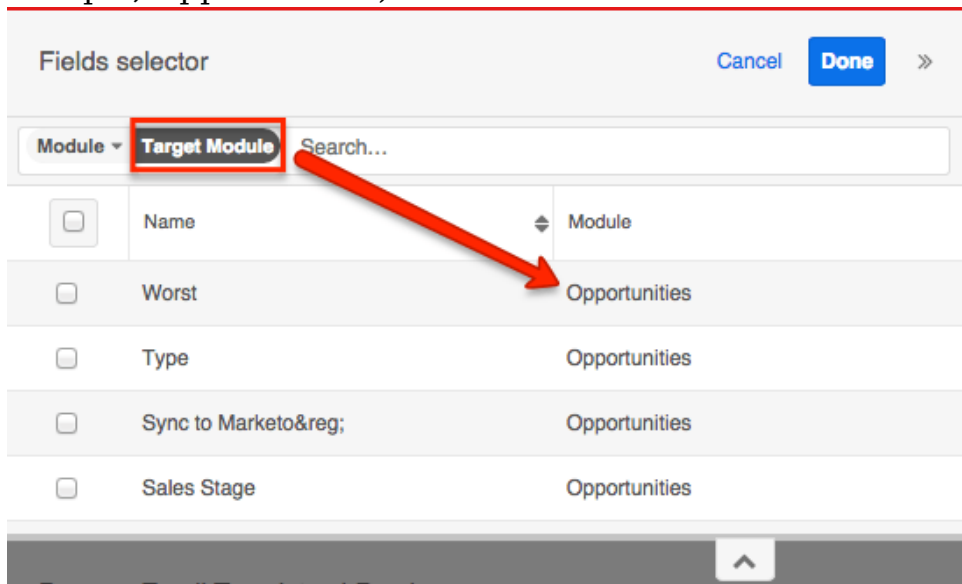
- 1:M >> Account:Opportunities : The Accounts module will be available as a related module in the Fields Selector.
- M:M >> Contacts:Opportunities : The Contacts module will not be available as a related module in the Fields Selector.
- M:1 >> Quotes:Opportunities : The Quotes module will not be available as a related module in the Fields Selector.

A common use case for the Field Selector tool is using the recipient's name in the message body (e.g., "Dear {first_name} {last_name},"). To insert a custom name using the Field Selector tool, follow these steps:

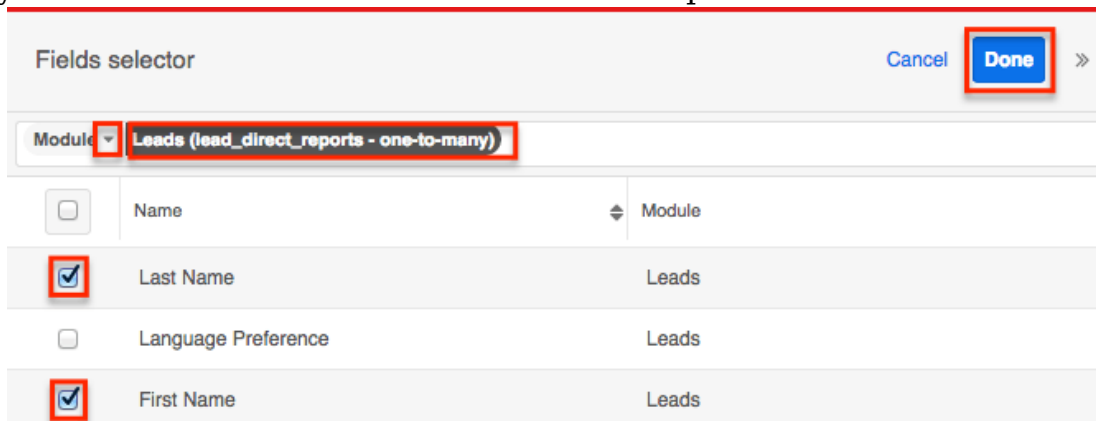
1. From the Process Email Template's design view, place the cursor in the message body where the custom variable should appear. Click on the Field Selector icon in the design toolbar.



2. The Fields Selector drawer will open over the current screen. By default, the Field Selector will display all fields in the template's target module (in this example, Opportunities).

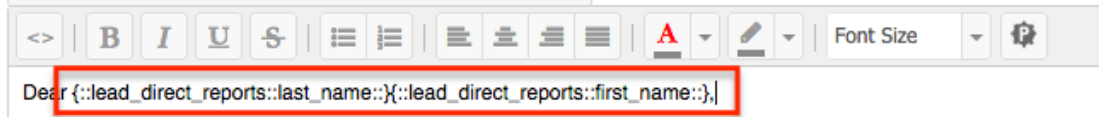


3. To find a variable from a related module, click the word "Module" to the left of the search bar and select the desired module. The list of field variables will update automatically. Select the checkbox adjacent to the field or fields that you would like to insert into the email template and then click "Done".



4. The template's design view will once again be visible and the selected variables will appear where your cursor was positioned before clicking on the

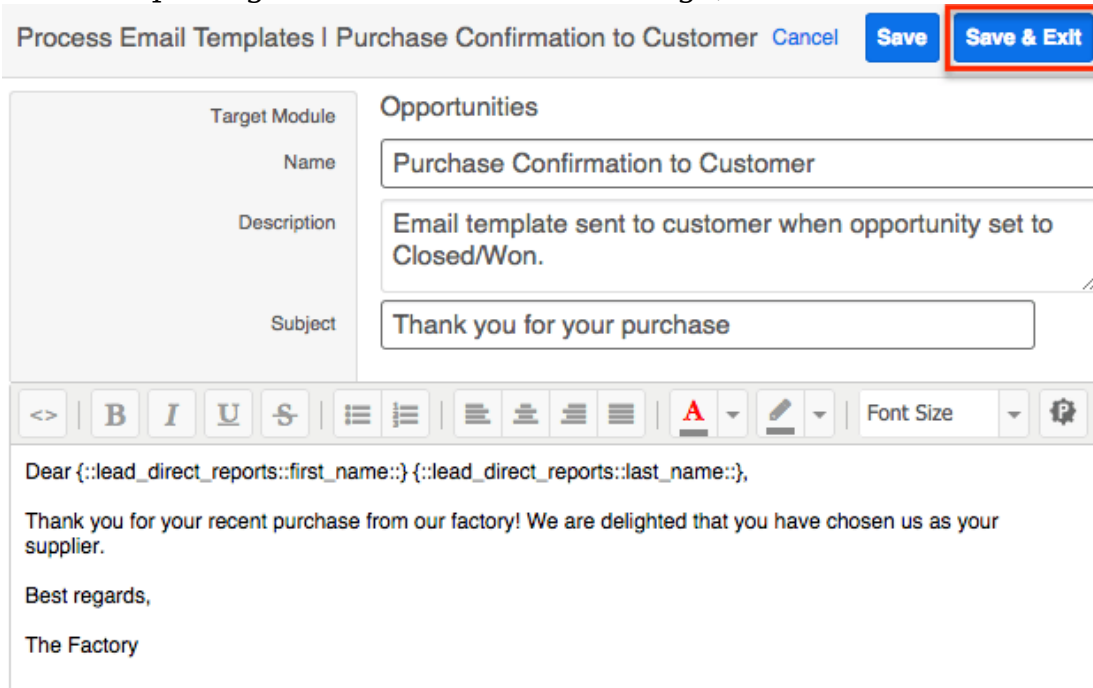
Field Selector icon.



5. If necessary, use the text editor to move the variables or insert additional characters. In this example, we will move the first name variable {::lead_direct_reports::first_name::} into position before the last name variable, and insert a space character in between the two variables:

Dear {::lead_direct_reports::first_name::} {::lead_direct_reports::last_name::},

6. After completing the content of the message, click "Save & Exit".



For information about utilizing process email templates in process definitions, refer to the [Send Message Events](#) section of the Process Definitions documentation.

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Process Definitions

Overview

The Process Definitions module is one of four advanced workflow modules that make up [Sugar Process Author™](#), a business process management tool in Sugar that enables administrators to streamline common business processes by managing approvals, sales processes, call triaging, and more. Process definitions

are central to the Process Author suite. They define the steps in automated business processes and control the flow of work that is allocated during running processes in Sugar. Process definitions are created by a Sugar administrator and consist of a network of activities and their relationships, criteria to indicate the start and end of the process, and information about the individual activities (e.g., participants) contained within the business process.

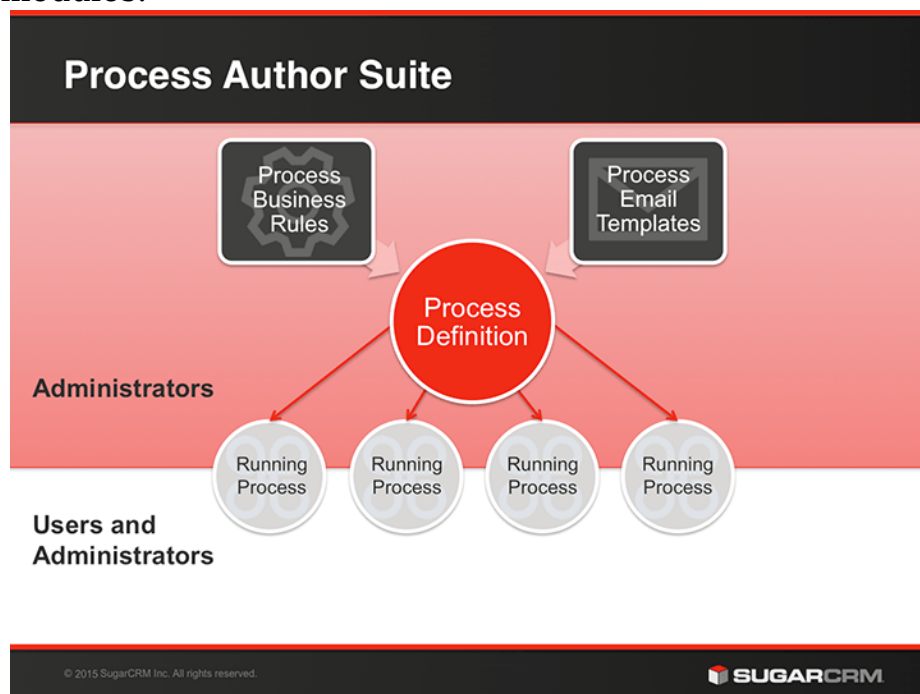
Before continuing, please read the [Process Author](#) overview page, which defines critical vocabulary and other elements that may be referenced on this page.

This documentation contains the following pages:

- [Process Author](#)
- Process Definitions (current page)
- [Process Business Rules](#)
- [Process Email Templates](#)

Additionally, the [Processes](#) page of the Application Guide contains documentation for the user-facing elements of Sugar Process Author. Please note that Process Author is exclusive to Enterprise and Ultimate editions of Sugar 7.6.x and later.

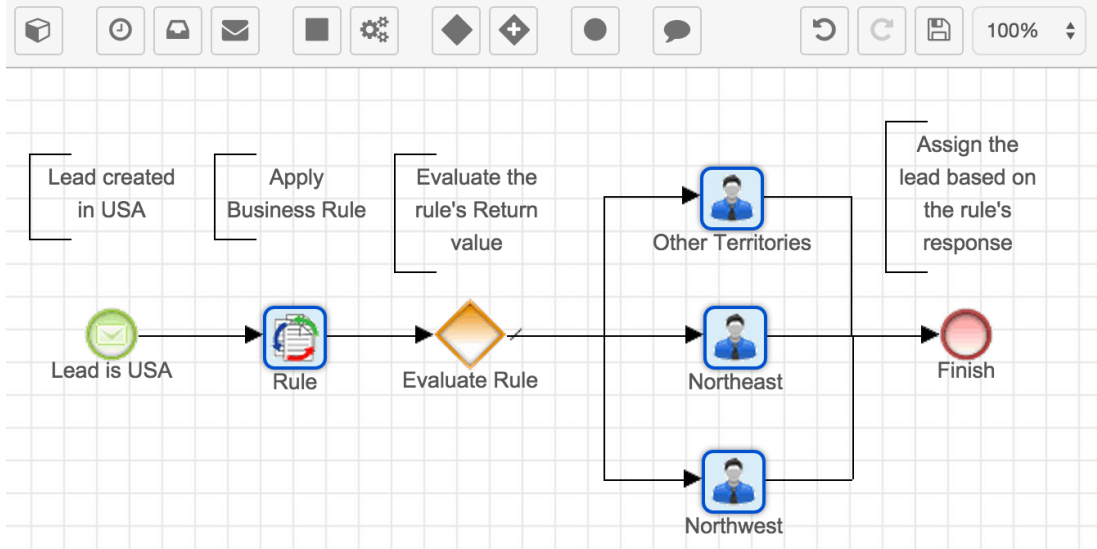
The following image illustrates the relationship between all of the Process Author modules:



The process definition will be the parent record for countless running processes in Sugar. Every time a process definition's [Start event](#) is triggered, a single process will begin to run in Sugar. When a running process requires action from a user,

that user will see the process in their [Processes dashlet](#) and Processes module list view. Users will never see the parent process definition that controls the process, nor will they see any processes for which they are not required to act.

This is an example of a complete process definition created in the [Visual Designer](#):



In the example above, the Start event is triggered when a lead is created with a billing address country of USA. Every time this condition is met, the process definition will generate a new process instance.

Prerequisites

If a process definition will utilize [process business rules](#) or [process email templates](#), those records must be created before designing the process definition. For more information about creating records in these supporting Process Author modules, please refer to the corresponding section of the Process Author documentation.

Process Definition Fields

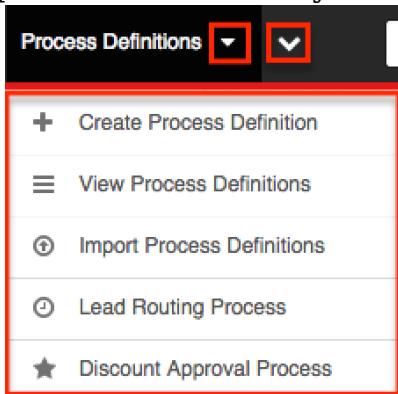
The Process Definitions module contains the following fields:

| Field | Description |
|---------------|--|
| Assigned To | The Sugar user assigned to the process definition |
| Date Created | The date the process definition record was created |
| Date Modified | The date the process definition record |

| | |
|---------------|---|
| | or its design was last modified |
| Description | A description or other information about the process definition |
| Name | A unique and descriptive name |
| Target Module | The module that will be used for the Start event in the process definition design |

Process Definitions Module Tab

The Process Definitions module tab is located on the navigation bar at the top of the Sugar screen when the administrator is engaging with the Process Definitions module. Click the tab to access the Process Definitions list view. You may also click the triangle in the Process Definitions 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 process definitions you last viewed in the module. The Favorites menu displays the list of process definitions you most recently marked as favorites in the module.



The Actions menu allows you to perform the following operations:

| Menu Item | Description |
|--|--|
| Create Process Definition | Opens the record view layout to create a new process definition |
| View Process Definitions | Opens the list view layout to search and display process definitions |
| Import Process Definitions | Opens the import wizard to enable import of .bpm files |

If you do not see the Process Definitions module tab in Sugar, please check the following:

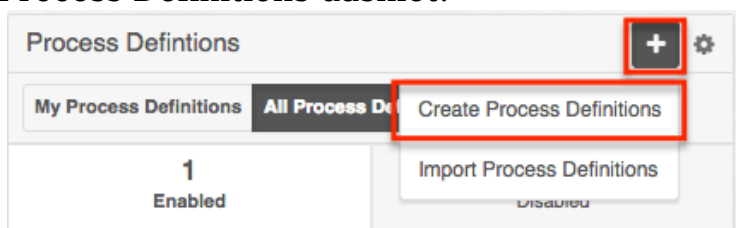
- Sugar Process Author is only available for Enterprise and Ultimate editions of Sugar. If you are using the Professional edition but would like to leverage Sugar Process Author for advanced workflow functionality, please [contact your Sugar Account Manager](#) for information on upgrading your instance.
- To access the Process Definitions module or the Process Definitions module tab, you must be a [System Administrator user](#) or a regular user with a role that provides [developer access](#) to one or more modules.
- The Process Definitions module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Process Definitions module in the Hide Modules list, simply move it to the Display Modules list and save. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Process Definitions module for your entire Sugar instance. Reach out to your Sugar administrator to have the Process Definitions module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

Creating Process Definitions

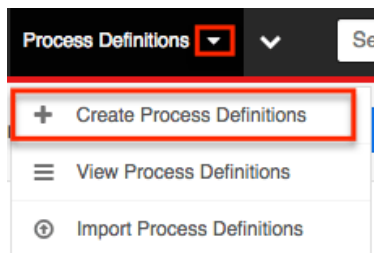
Note: All process definitions are disabled by default so that they will not trigger during the design phase. Please refer to the [Enabling Process Definitions](#) section of this page for steps to enable a completed process definition.

Process Definitions can be created from any of the following places in Sugar:

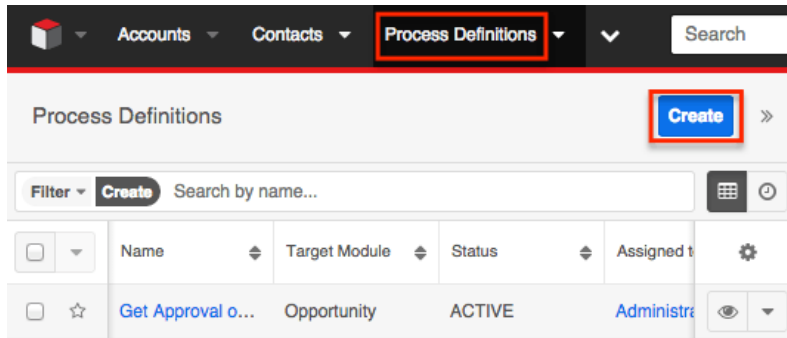
- Process Definitions dashlet:



- Process Definitions module tab menu:



- Process Definitions list view:



Upon clicking "Create Process Definitions" (or the Create button from list view), you will be directed to the process definition's record view. The record view is where you store information that will make it easy to find and understand the process definition in the future.

After completing this form, you will then be directed to the [Visual Designer](#) canvas where the process definition's elements can be composed.

For more information about the available fields in the Process Definitions module, please refer to the [Process Definitions Fields](#) section of this documentation.

Note: New process definitions are set to "Disabled" by default. After the design has been fully configured in the Visual Designer, you must set the process definition to "Enabled" in order for it to run.

Designing Process Definitions

Creating a process definition for your business process is easy using Process Author's visual designer, where you can graphically assemble a series of flow elements using an intuitive drag-and-drop interface. In the visual designer, process

definitions are auto-saved every 15 seconds, and the Undo button can revert changes as far as 25 levels back per session.

All process definitions are set to "Disabled" by default in order to prevent triggering of processes before the design is complete. This means that you must change the status to "Enabled" before it will work. Please see [Enabling Process Definitions](#) for more information.

Note: The visual designer interface may not be compatible with some touch-screen mobile devices. Please build process definitions from a desktop or laptop computer to prevent any potential complications.

Editing and Annotating Process Definitions

Before designing a process definition, take a moment to understand how to interact with process elements on the design canvas.

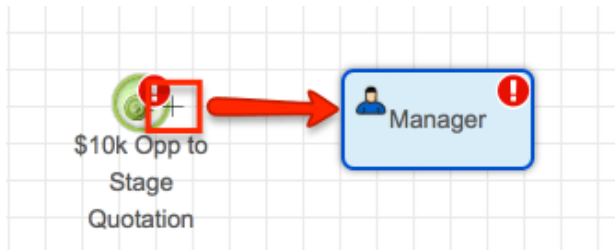
Sequence Flow

When you assemble a process definition, you are defining the overall sequence flow. The flow dictates the processing order of the events, actions, and activities in a process and is visually represented by lines called sequence connectors. Each sequence connector originates from a single source element (e.g. action, event, etc.) to a single target element.

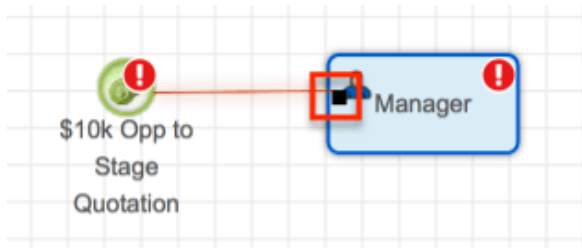
Adding Sequence Connectors

All elements of a process flow must be connected by at least one directional line. Failure to connect flow elements correctly will result in an error in the [Element Errors Panel](#).

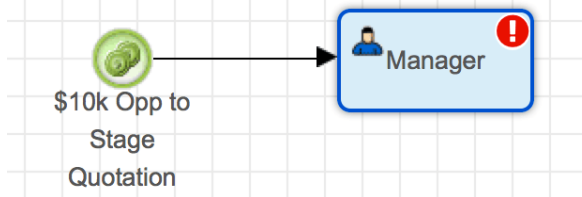
1. To connect two elements on the Designer canvas, hover over the outer edge of the Start event icon until the mousetip changes into a crosshair:



2. Click the mouse button and drag the mouse over to the outer edge of the intermediate element until the line turns red and glows:



3. Release the mouse button and the glowing red line will transition into a solid black line with an arrow on the end, pointing towards the intermediate element and indicating direction of flow from one element to another.



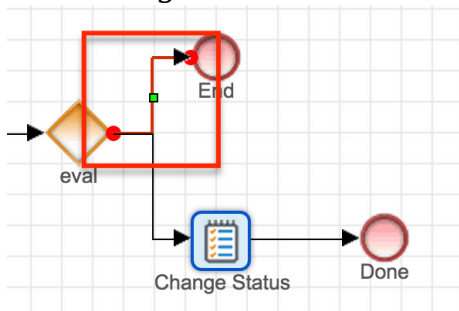
4. Optionally, adjust the position of the process elements to achieve a straight line.

Note: When dragging a connector to a subsequent element, you may choose to release the mouse button at the top, bottom, left, or right edge of the element in order to aesthetically organize the process and avoid running into other connector lines, which may possibly affect the flow of the process. For more information on interacting with objects on the canvas, please refer to the [Moving and Deleting Design Elements](#) section of this documentation.

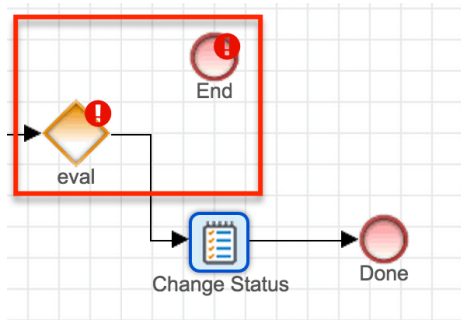
Removing Sequence Connectors

To remove unwanted or misplaced sequence connectors from the design canvas, simply click on the line and press Delete on your keyboard as explained here:

1. Click on the segment of line that you wish to remove. The connector will transition to a selected state, and the beginning and end points of the connector line will be represented by red dots. Please confirm that the line connecting these red dots is the line you intend to delete.



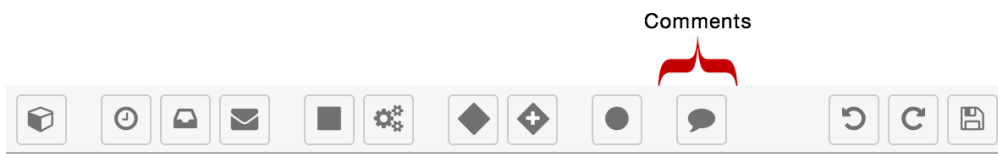
2. Press the Delete key on your keyboard. The selected line will disappear.



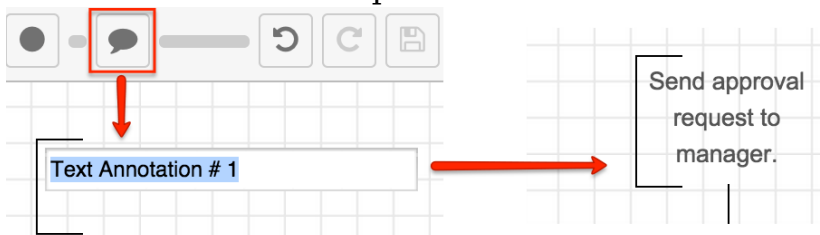
If you accidentally delete a sequence connector, simply press the [Undo button](#) on the toolbar. Always review the settings for any canvas element reinstated by the Undo or Redo buttons to confirm they are configured as expected. For more information on interacting with objects on the canvas, please refer to the [Moving and Deleting Design Elements](#) section of this documentation.

Comments

The Comment element allows admins to mark up the designer canvas with helpful annotations connected to Action and Activity elements. While all elements can be re-labeled, further explanation may come in handy to explain more complex Process Definitions.



To insert a comment onto the Designer Canvas, simply drag and drop the comment icon onto the canvas and then double click on the text "Text Annotation" to type a comment. Hit Enter to preserve the comment.



Editing Tools

Common editing tasks can be accessed on the right-most side of the Designer Toolbar. The three icons represent Undo, Redo, and Save.

Note: Always review the settings for any canvas element re-instated by the Undo or Redo buttons to confirm they are configured as expected.



- Undo : Click to undo the last change made in the Process Definition (up to 25 changes). When an undo action restores a design element on the page, it will not restore the element's configuration.
- Redo : Click to redo the last change made in the Process Definition (up to 25 changes). When a redo action restores a design element on the page, it will not restore the element's configuration.
- Save : This control allows users to save all changes made by them on the Process Definition design. This button is enabled only when there are unsaved changes. Keep in mind that the Visual Designer auto-saves your work every 15 seconds. To save your process, click on this icon in the Designer's elements.

When an enabled process definition's design is edited, any running process will immediately adapt to the new flow pattern. Therefore, it is best practice to disable a process definition before making changes to its design. Disabling the process definition will prevent running processes from adapting to the new flow prematurely. Please note that changing the process definition's status to "Disabled" will not cause any interruptions to already running processes. Upon re-enabling the process definition, any processes still running will adapt to the new flow.

Moving and Deleting Design Elements

To reposition or remove an entire branch or other group of elements from a process definition design, you can easily mass select them on the canvas. The following table summarizes the mass actions available via the design canvas.

| Task | Procedure |
|---|--|
| Select a single element | Point to the element on the design canvas until the mouse tip becomes a four-headed arrow then click the shape. |
| Select multiple elements within an area | Click on the design canvas above and to the left of the elements that you want to select and then drag to create a selection box around the shapes. Any elements partially within the selection area will be included as part of the |

| | |
|--|--|
| | selection. |
| Move an element or group of elements using your mouse | <ol style="list-style-type: none"> 1. Select the element(s) that you want to move. 2. Position the mouse pointer over one of the elements. A four-headed arrow appears. 3. Click and drag the elements to their new positions. 4. All of the selected elements will move the same distance and direction from their original positions. |
| Nudge an element or group of elements using the arrow keys | <ol style="list-style-type: none"> 1. Select the element(s) that you want to move. 2. Press an arrow key in the direction you want the group to move. The elements will nudge one pixel for each tap of an arrow key. Press and hold the arrow key to move the elements quickly. <p>Note: If pressing an arrow key scrolls or zooms the entire canvas instead of moving the selected elements, please make sure that your SCROLL LOCK key is disabled.</p> |
| Delete an element or group of elements within an area | <ol style="list-style-type: none"> 1. Select the element(s) that you want to delete. 2. Press the delete key to remove the selected items from the design canvas. <p>Note: Sequence connectors associated with deleted elements will also be deleted.</p> |
| Delete a sequence connector | Please refer to Removing Sequence Connectors for more information on how to remove unwanted or misplaced sequence connectors from the design canvas. |
| Deselect all elements | Click a blank area on the design canvas. |

Adding a Start Event

A Start event indicates where a process will begin. It defines the action that will trigger a new process to run. The Start event will always be characterized by a module record in Sugar, but it will vary by whether it applies to new records or to qualified updates to the Sugar records.

Note: The target module chosen in the process definition's record view is the module that is used for the Start event in the process definition design.

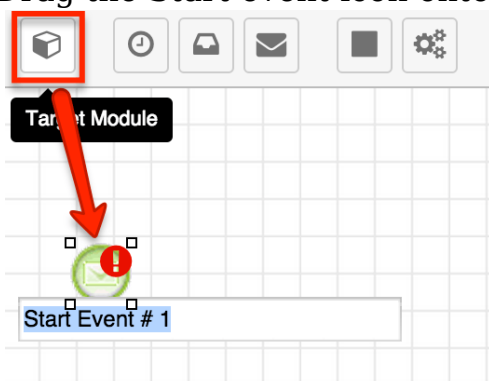
Start events are represented by the Sugar cube icon, the first icon on the design toolbar.

Start Event

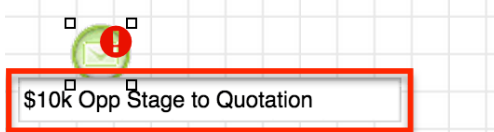


Follow these steps to add a Start event to the process definition:

1. Drag the Start event icon onto the Designer canvas.

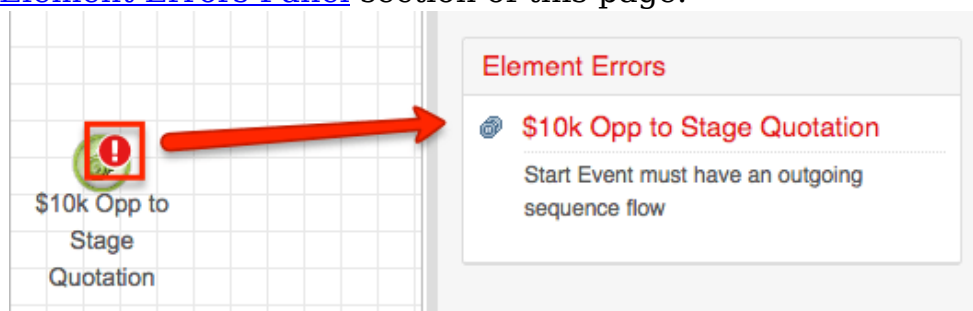


2. Double-click the Start event icon's label to re-name it.

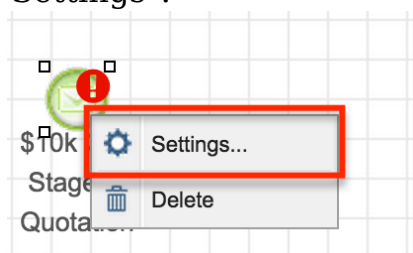


Note: The Start event will have an error alert (!) icon warning you to add an outgoing sequence connector. This is normal and will disappear after you create the next element and connect it to the Start event. For more

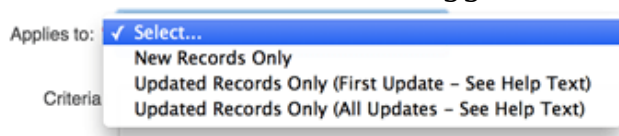
information about element errors, refer to the [Resolving Errors in the Element Errors Panel](#) section of this page.



3. To configure the Start event, right click on the Start event icon and choose "Settings".



4. Select an "Applies to" preference. Click on the down arrow to select how the process definition will be triggered to start. There are three options:



- New Records Only : A new process will begin if a record is created and the specified conditions are met on the first save.
 - Updated Records Only (First Update) : A new process will begin the first time the specified conditions are met on an existing record, even if the record has been updated several times before it qualifies. Once a record meets the conditions to trigger a First Update process, it cannot trigger that process definition again.
 - Updated Records Only (All Updates) : A new process will begin every time an existing record is saved and the specified conditions are met, as long as the process is not already running against the record. A given process definition can only run one process instance against a particular record at a time. However, it is important to note that two or more different process definitions may simultaneously run against the same record.
5. Click inside the Criteria field to expose the criteria builder and set the conditions for the Start event. Please refer to the [Creating Conditions for Events and Actions](#) section of this page to configure the conditions for the Start event.

Adding Multiple Start Events

A single process definition may have multiple Start events as long as those Start events contain mutually exclusive criteria. In other words, only one Start event can evaluate to "true" for any given record. If it is possible for two or more Start events to evaluate as "true" against one Sugar record, the criteria for these Start events will be met simultaneously. Sugar Process Author does not support this type of configuration.

The following table demonstrates proper and improper use of multiple Start events:

| | | Applies to | Criteria | Explanation |
|---------------|----------------|--|-----------------------|---|
| ☐ Good design | Start Event #1 | Accounts; New Records Only | Type {is} Customer | A Sugar record cannot be simultaneously "new" and "updated" (i.e., existing). It is therefore impossible for these two Start events to evaluate as "true" at the same time, making them mutually exclusive. |
| | Start Event #2 | Accounts; Updated Records Only (First Update) | Type {is} Customer | |
| ☐ Bad design | Start Event #1 | Accounts; New Records Only | Type {is} Customer | This combination of Start event criteria is not mutually exclusive. A new account in Sugar may be classified as both "Manufacturing" and "Customer", which would make both events evaluate as "true". |

| | | | | |
|--|----------------|----------------------------------|---|--|
| | Start Event #2 | Accounts; New records Only | Industry {contains} Manufacturing | Instead, use one Start event with an OR operator between the two sets of criteria. |
|--|----------------|----------------------------------|---|--|

The "Good design" example above applies a process definition to both new and updated records by using one Start event triggered by "First Update" and a second Start event triggered by "New Records Only". When using multiple Start events, join each of them to the next element in the process definition with separate connectors. Multiple Start events in a process definition should always merge into a single flow.

Adding Intermediate Events

As the name suggests, intermediate events occur after a process starts but before the process is complete. Intermediate events that are placed within the overall process flow represent things that happen during the normal operation of the process such as sending messages, receiving messages, or mandatory waiting periods.

Note: Intermediate events require the Process Author Scheduled Job scheduler to execute. If schedulers are not running, the flow of the process will be interrupted. For more information, please refer to the [Process Author](#) documentation.

Intermediate events are represented by the second group of icons on the design toolbar. There are three icons that each enable a configurable event.



The types of intermediate events are:

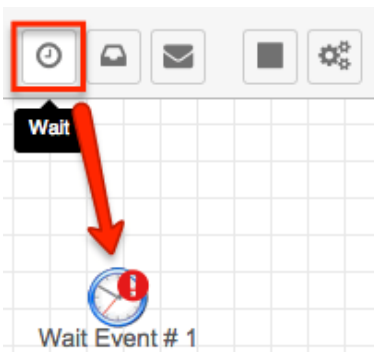
- [Wait Events](#)
- [Receive Message Events](#)
- [Send Message Events](#)

Wait Events

This element will stop the execution of a process by the time interval set in the configuration. Wait events support specified times as well as a calculated delta between two times or events.

Note: Schedulers, specifically the Process Author Scheduled Job, must be running to execute Wait events. If schedulers are not running or if the event is not properly configured, the flow will be halted indefinitely, thereby stopping the flow of the process. For more information, please refer to the [Process Author](#) documentation.

To add a Wait event to the flow, drag and drop the clock icon onto the canvas:



To configure this event, right click on the icon and choose "Settings". A new window will display:

The configuration window has two main options: Duration and Fixed Date. Choose one of these options to enable its configuration fields.

- Duration (radio button) : Choose this option to define the duration of the Wait event.

Duration

Duration:

Unit:

- Duration (text field) : Required field when "Duration" is selected above. Enter an integer to use in conjunction with the Unit field.
- Unit : The duration will be defined in days, hours or minutes.
- Fixed Dates (radio button) : Choose this option if the Wait event will be based on one or more of the record's date fields or a calculated formula. Formulas may be constructed using a combination of operators, Sugar variables, and constants.

Fixed Date

Criteria:

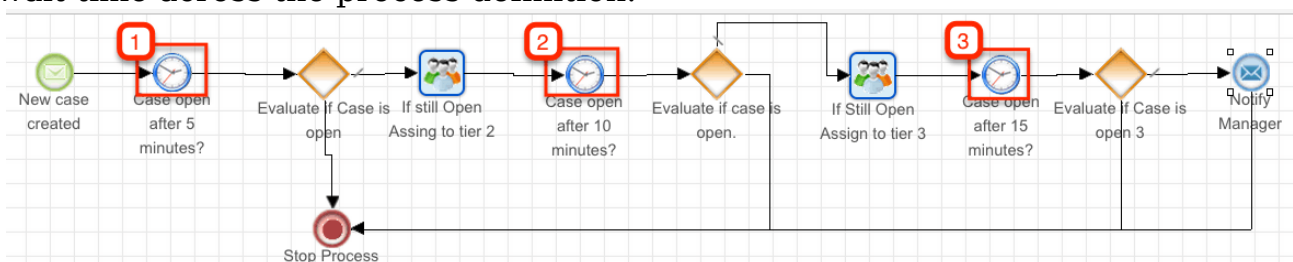
+ -

Constants

Fields

- Criteria : Click inside this field to reveal the criteria builder. Please refer to the [Creating Conditions for Events and Actions](#) section of this page for instructions on using the criteria builder.

A Wait event's clock begins when the Wait event is triggered. For example, the following process definition contains three Wait events. Each one will pause and evaluate a running process at 5-minute intervals, for an aggregate 15 minutes of wait time across the process definition.



While the Wait events enforce an evaluation at 5, 10, and 15 minutes into the process, the settings for each element need only account for the 5-minute span between timed events, and not its relative distance from the start of the process. Therefore, the Duration setting for each Wait event in this example should be set to 5 minutes.

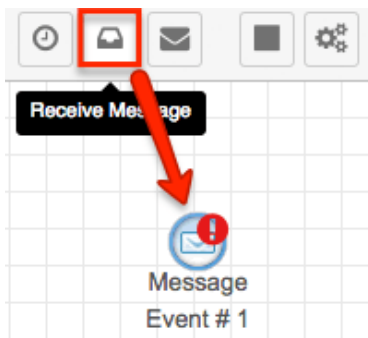


Receive Message Events

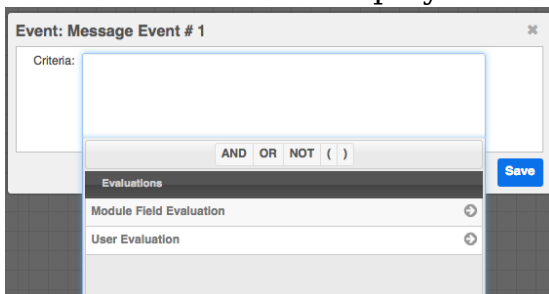
This event will stop the flow of a process definition until the established criteria in the configuration are accomplished. In essence, it is a Wait event that pauses until a condition is met instead of for a specified duration.

Note: Schedulers, specifically the Process Author Scheduled Job, must be running to execute Send Message events. If schedulers are not running or if the event is not properly configured, then the event will stop the flow of the process. For more information, please refer to the [Process Author](#) documentation.

To add a Receive Message event to the flow, drag and drop the Receive Message icon onto the canvas:



To configure this event, right click on the icon and choose "Settings". A criteria builder window will display:



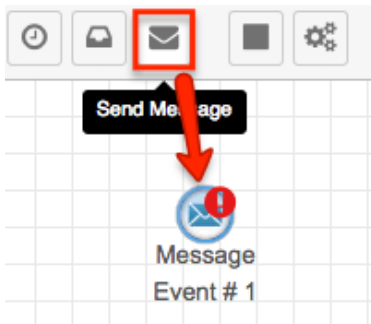
Click inside the Criteria field to reveal the criteria builder. Please refer to the [Creating Conditions for Events and Actions](#) section of this page for further instructions.

Send Message Events

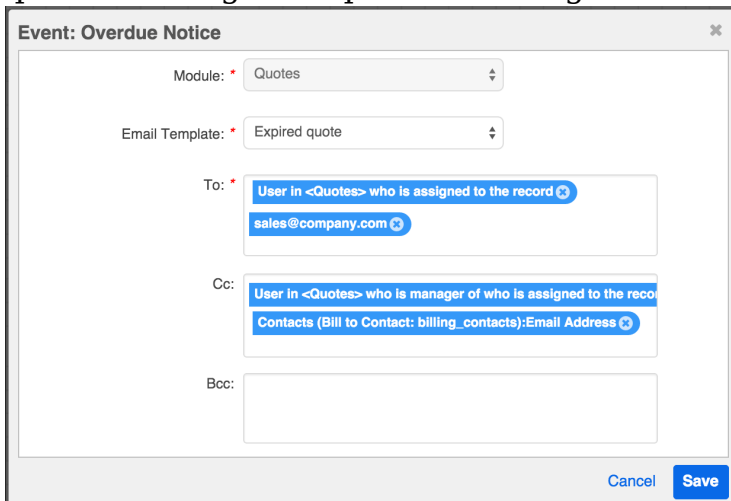
This event is the only one that can send email messages. These messages must be created in the [Process Email Templates](#) module. Conveniently, email recipients can be configured using variables and wildcards.

Note: Schedulers, specifically the Process Author Scheduled Job, must be running to execute Send Message events. If schedulers are not running or if the event is not properly configured, the flow will ignore the event and continue running without sending any mail. For more information, please refer to the [Process Author](#) documentation.

To add a Send Message event to the flow, drag and drop the envelope icon onto the canvas:



On the design canvas, right click on the blue Send Message icon and select the option "Settings" to open this configuration window:

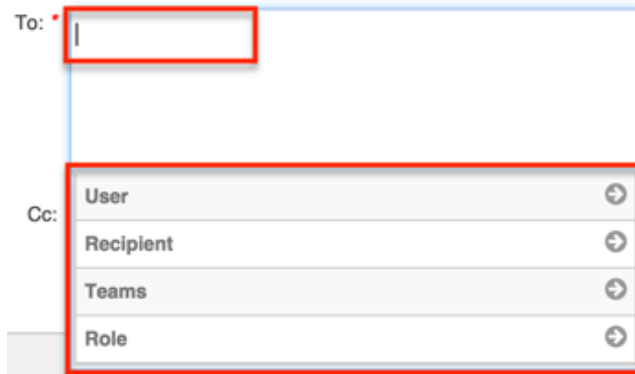
A screenshot of a configuration window titled 'Event: Overdue Notice'. The window contains several fields: 'Module' is set to 'Quotes'; 'Email Template' is set to 'Expired quote'; 'To:' is populated with 'User In <Quotes> who is assigned to the record' and 'sales@company.com'; 'Cc:' is populated with 'User In <Quotes> who is manager of who is assigned to the record' and 'Contacts (Bill to Contact: billing_contacts):Email Address'; 'Bcc:' is empty. At the bottom right, there are 'Cancel' and 'Save' buttons.

The Send Message event's configuration window contains the following settings:

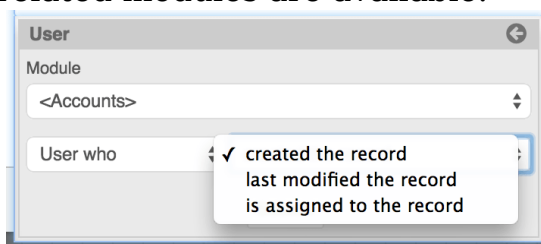
- **Module** : This read-only field will display the name of the target module set in the process definition.
- **Email Template** : (required) Choose an email template from the dropdown list.

This list will only display templates that have the target module specified in the previous field.

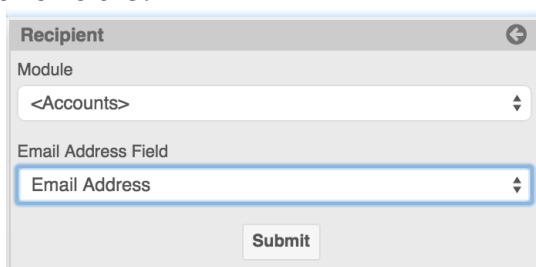
- To, Cc, Bcc : (The To: field is required) Specify the message recipients. Click inside the text area to reveal optional recipient types, or simply type an email address into the window.



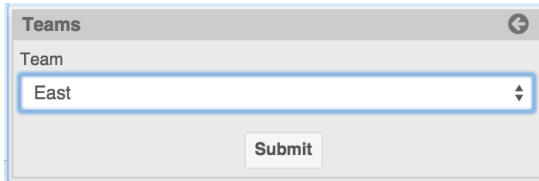
- User : Click on the User menu item to send a message to the user or manager of the user who created, modified, or is assigned to the specified module record. To add a user associated with a related module, choose a related module from the Module dropdown. All 1:1 and M:1 related modules are available.



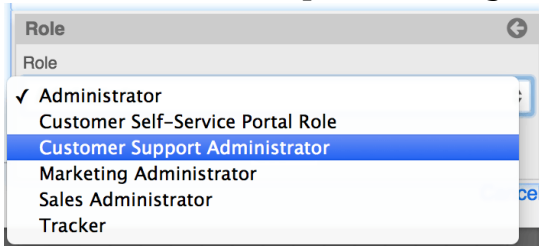
- Recipient : Click on the Recipient menu item to send a message to an email address stored in the Sugar database within the target or a related module. You must specify which module field contains the email address. To add a recipient associated with a related module, choose a related module from the Module dropdown. All 1:1 and M:1 related modules are available.



- Teams : Click on the Teams menu item to send a message to all of the users on a specified Sugar team. Inactive and private teams are hidden from this list.



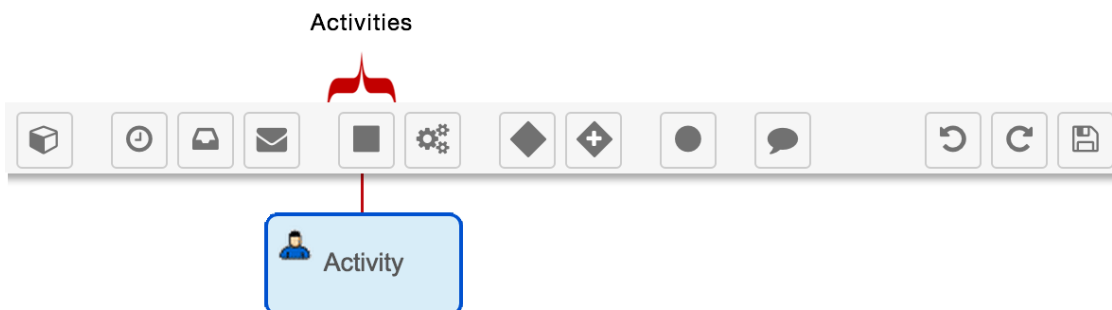
- Role : Click on the Role menu item to send a message to all of the users associated with a specified Sugar role.



- Specific Email Addresses : To insert one or more specific email addresses (e.g., mail@example.com), type directly into the To, CC, or BCC field, pressing the Enter key after each address.

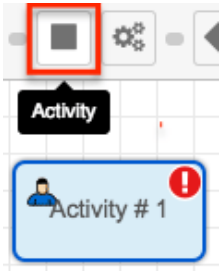
Adding Form Activities

The only unit of work that requires user interaction (opposed to automation) is an Activity. It is a moment within a flow where a user must decide if a circumstance is approved or rejected, or review a record that has been routed to them. Activities are represented by the solid square icon on the design toolbar:



Activities pause a process until a user makes a decision to either approve or reject the record, or indicates that they have reviewed a record that has been routed to them. When a process reaches this point in the flow, the appropriate user will see a line item in their Processes dashlet or Processes module list view. An Activity form element is configured in two steps. First, configure the [Forms](#) setting and then configure the [Users](#) setting.

To add a Form activity to the process definition's flow, drag and drop the Activity icon onto the canvas:



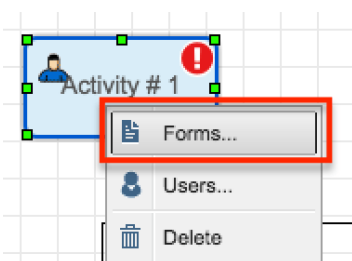
Forms Setting

The "Forms..." setting controls what type of form the process user will see when they are asked to execute this activity. The process user must be separately configured in the "[Users...](#)" setting. There are two types of Activity form:

- Approve/Reject : This type of form will present itself as an Approve button and a Reject button on the record view of the record that triggered the process. A Gateway element must be placed after the Approve/Reject activity in order to specify a flow for approval as well as a flow for rejection.
- Route : This type of form should be used to ensure that a record within a process has been viewed or edited by the user configured in the Activity's "[Users...](#)" setting. The form will present itself as a Route button on the record view of the record that triggered the process. The process user has the option to edit the record before clicking the Route button. The administrator may choose to ensure only relevant fields are edited by leveraging the [Read Only Fields](#) and [Required Fields](#) options for this activity.

Note: If an activity is not properly configured, it will default to an Approve/Reject form.

To configure the Forms setting for an activity, right click on the icon and select "Forms...".



A configuration window will open. The configuration window has four tabbed sections.

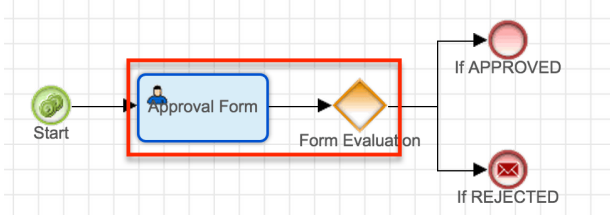
- [General Tab](#)
- [Read-Only Fields Tab](#)
- [Required Fields Tab](#)
- [Expected Time Tab](#)

These are explained in detail in the following sections.

General Tab

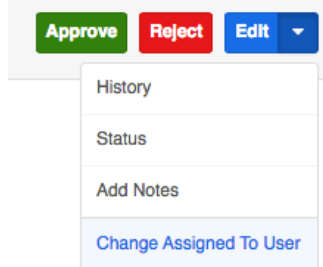
View the General tab (enabled by default) to choose a form type for the activity.

- Form Buttons : Select the type of form to display.
 - Route : The user will be prompted to acknowledge that they have reviewed and optionally edited/commented on the record.
 - Approve/Reject (default) : The user will be prompted to approve or reject a circumstance. Approve/Reject Form activities should always be followed by a [Gateway element](#) with [Form Response Evaluation](#) criteria to define the next step of the process in the case of approval or rejection.

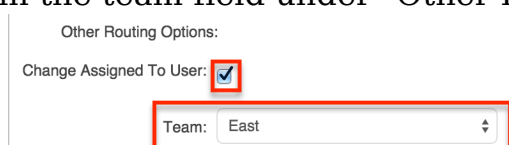


- Other Routing Options: During a Form activity's execution, the process user may be given the option to reassign the record associated with the process. It may be appropriate to create specialized teams for users who will be engaged in particular parts of a process. For more information about managing teams and users, see the [Team Management](#) and [User Management](#) sections of the Administration Guide.
 - Change Assigned To User : Enabling this option will add the "Change

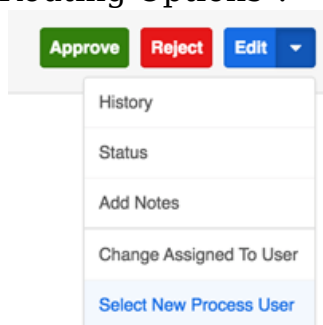
Assigned To User" option to the actions menu of the process execution screen, as seen here:



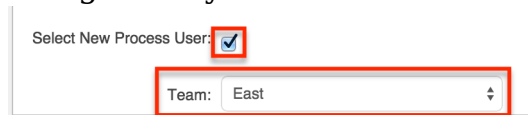
When the process activity is executed, the process user must select this option if they want to change the Sugar record's Assigned To user. The process user can only assign a user from the team configured by admin in the team field under "Other Routing Options".



- Select New Process User : Enabling this option will add the "Select New Process User" option to the actions menu of the process execution screen, allowing the designated process user to delegate the Form activity to someone else. The process user can only select a new user from the team configured by admin in the Team field under "Other Routing Options".



The current process user may select a new process user from the team configured by admin in the "Other Routing Options" Team field.



Read-Only Fields Tab

Here, the administrator can restrict the process user from editing some or all fields on the Sugar record for which the process applies. Place a checkmark next to the fields that should not be edited during the form processing step.

Required Fields Tab

In this tab, the administrator can require the process user to complete some or all fields on the Sugar record for which the process applies. Place a checkmark next to the fields that must be populated during the form processing step.

Expected Time Tab

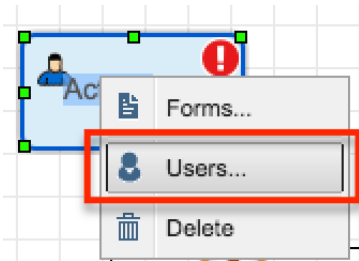
Complete the fields in the Expected Time tab to set a timeout interval for the process user to execute this activity. When the time specified in the Duration field has expired, the activity will be considered overdue. If an Activity is overdue, the Due Date property will be shown in red on the process execution screen and the process will appear in the "Overdue" tab of the My Processes dashlet.

Users Setting

The "Users..." setting controls which user will be responsible for executing the process activity form. When a process reaches the activity in a flow, the process user will see a line item in their Processes dashlet or Processes module list view. The form type and other options must be separately configured in the "[Forms...](#)" setting.

Note: The Assignment Method chosen here refers only to the user that will execute the process, or "Process User". References to the Sugar record's assigned user are labeled "Assigned To User".

To configure the Users setting for an activity, right click on the icon and select "Users...".

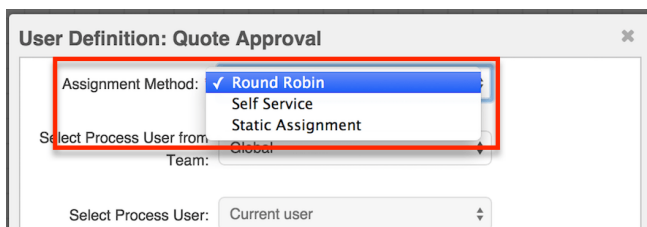


A configuration window will open. Choose one of the following process user assignment methods from the dropdown list:

- [Static Assignment](#)
- [Round Robin](#) (default)
- [Self Service](#)

These three options are explained in detail in the following sections.

Note: If this activity type is not properly configured, it will default to the Round Robin process-assignment method for the Global team.

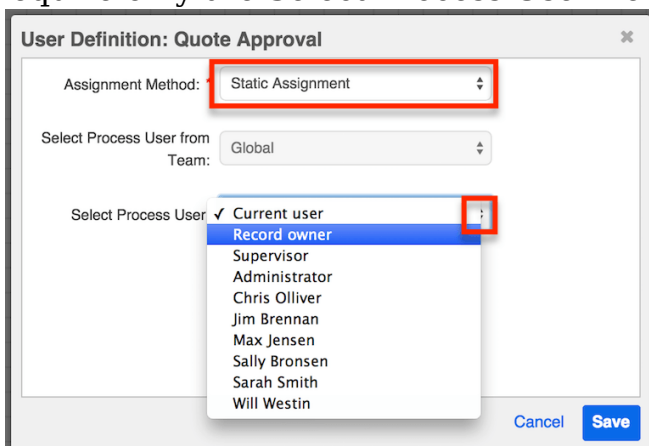


Static Assignment

Choose "Static Assignment" to assign process Activities to a specific process user. You can also select one of the following variable user types:

- **Current User** : The Current User refers to the last process user who has been defined in the process definition. If no process user has been previously defined, the Current User will be the user who is in the Assigned To field of the targeted Sugar record.
- **Record Owner** : The Record Owner is the user who is in the Assigned To field of the targeted Sugar record.
- **Supervisor** : When selected, the supervisor of the user who is in the Assigned To field of the targeted Sugar record will be prompted to execute this process activity. This relationship must be configured in the "Reports to" field of the Users module. For more information about editing User fields, please refer to the [User Management](#) page of the Administration Guide.

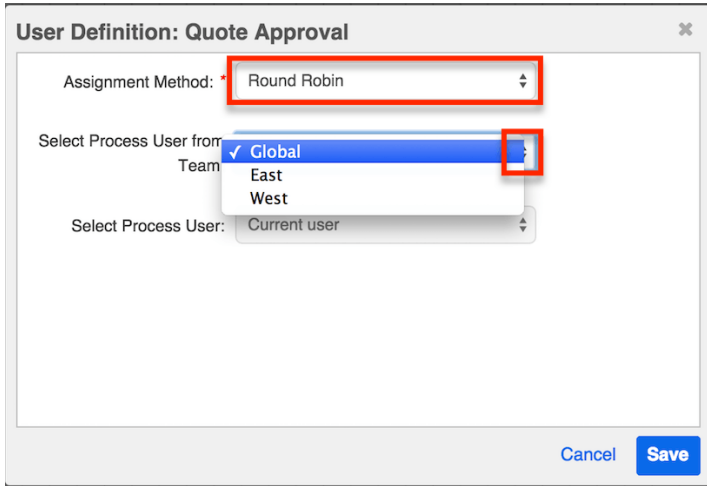
Static Assignment will disable the Team configuration option in this window and require only the Select Process User field to complete the configuration.



Round-Robin

Choose the Round Robin assignment method to equally distribute process activities to the [explicit members of a team](#) in a take-your-turn fashion. For example, if Jim and Sally belong to team "East," a Round Robin distribution for team East will assign the activity to Jim the first time it runs, to Sally the second time it runs, and then to Jim again on the third execution (and so on). The processing order of Round Robin activities is based on the Created By date of the user record in the Users module.

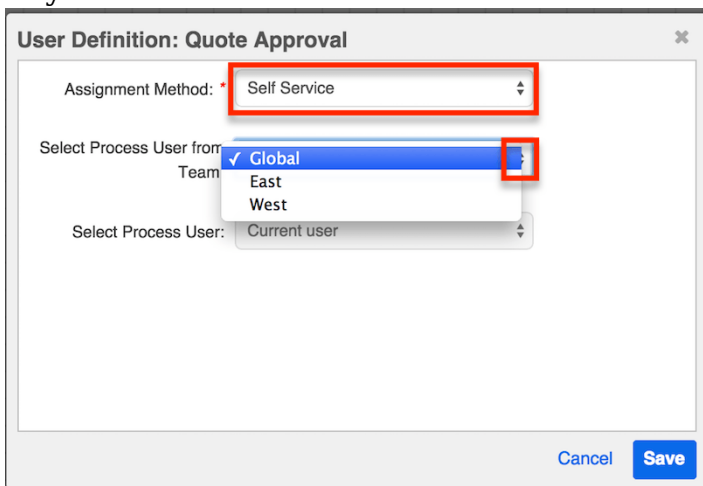
Round Robin will disable the Select Process User option in this window and require only the "Select Process User From Team" field to complete the configuration.



Self Service

Choose the Self Service assignment method to allow any user of a specified team to claim the activity in a process. By enabling users to claim process activities as they have time for them, Self Service assignment reduces congestion in the workflow. Self Service activities that are ready to be claimed will appear in the Self Service Processes tab of the Processes dashlet.

Self Service will disable the Select Process User option in this window and require only the "Select Process User From Team" field to complete the configuration.



Adding Actions

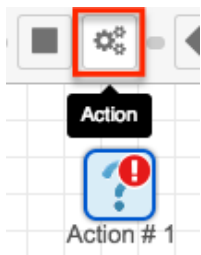
Actions are automated elements used to execute a business rule, create or update a Sugar record, or designate a process user. Actions are completed by the Process Author engine and do not require any human interaction to execute. There are five types of actions available in the Visual Designer and they are all represented by a single icon on the design toolbar:



The action must be configured after adding it to the designer canvas. The five available action types are:

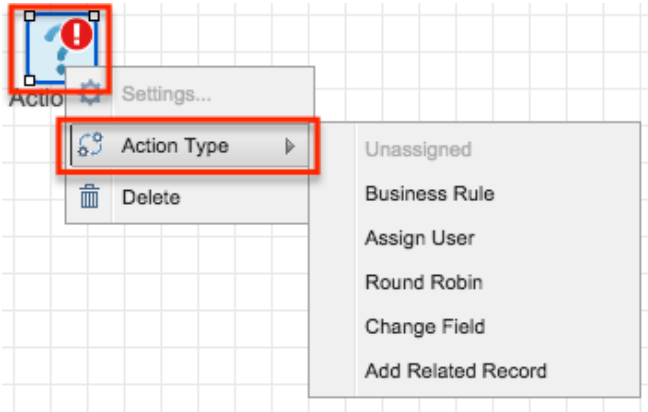
- [Business Rule](#)
- [Assign User](#)
- [Round Robin](#)
- [Change Field](#)
- [Add Related Record](#)

To add any of these actions to a process definition, drag and drop the Action icon from the design toolbar onto the Visual Designer canvas:



Note: The Action will have an error alert (!) icon warning you to add an outgoing sequence connector and define an action type. This is normal and will disappear after you create the next element and connect it to the configured action. For more information about element errors, refer to the [Resolving Errors in the Element Errors Panel](#) section of this page.

The Action will display a question mark until it has been configured. Right click on the Action icon to configure the action type. By default, an Action element is configured as type "Unassigned". This is simply to prevent a non-configured Action from affecting the Process flow. You must choose one of the Action Types and then configure the appropriate settings.



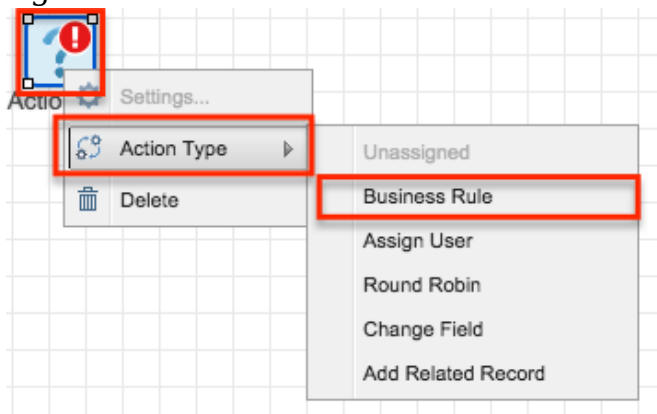
- Settings : This option will be grayed out until an action type is selected.
- Action Type : Choose the type of action this element will execute. These options are explained in detail in the remaining [Adding Actions](#) sections of this page.
- Delete : Remove the element from the canvas.

Business Rule

This Action type allows the administrator to select a [process business rule](#) in order to return a corresponding value. Business Rule actions must be followed by a Gateway element to analyze the rule's return value. Follow these steps to add a process business rule to the process definition:

Note: The process business rule must already be configured and saved in the [Process Business Rules](#) module in order for it to be available in the Action's settings and must utilize the same target module as the process definition.

1. Right click on the Action icon and then select Action Type > "Business Rule":



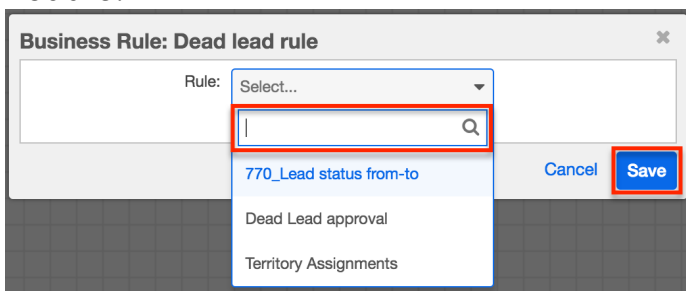
2. The Action's icon will change to:



3. Right click on the icon again and choose "Settings":



4. Select the appropriate process business rule and then click the Save button. Please note that the Rule dropdown list will only display rules that were configured for the same target module as the process definition's target module.



5. Now place a gateway element to the right of the business rule icon. Connect the business rule action to the gateway using a [sequence connector](#). Note: The gateway element is required in conjunction with a business rule action.
6. Determine the number of possible outcomes for the business rule. Drag the corresponding elements for each icon (any combination of events, actions, or activities) to the design canvas, just to the right of the gateway.
7. Connect the gateway to these elements using [sequence connectors](#).
8. Finally, configure the gateway criteria before moving on. The gateway will evaluate all possible outcomes of the business rule and direct the flow of the process to the next element as appropriate. Please refer to the [Adding Gateway Elements](#) section of this page for more information.

Assign User

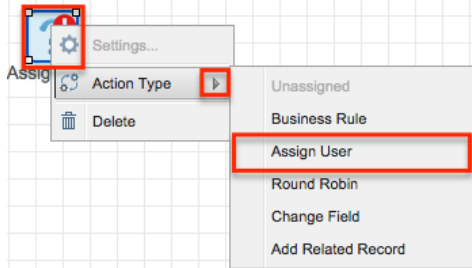
This Action type allows the administrator to specify a new process user, or the user who will be responsible for the remaining part of the process. Assign User actions should be followed by an [Activity](#) for the process user to complete. When a process reaches this point in a flow, the process user will see a line item in their Processes dashlet or Processes module list view.

Follow these steps to add an Assign User action to the process definition:

Note: If an Assign User action is not properly configured, it will stop the flow of the

process.

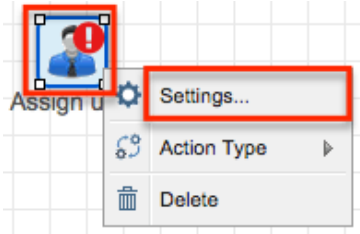
1. Right click on the Action icon and then select Action Type > "Assign User":



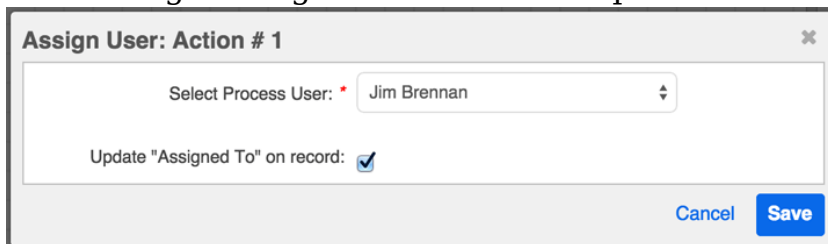
2. The Action's icon will change to:



3. Right click on the icon and choose "Settings":



4. The Settings dialog window has two options:



- Select Process User : Select the name of the user that will be responsible for the remaining process steps, until the process ends or a new process user is designated. The Dropdown list will only display users that have an Active status in the Users module.
- Update "Assigned To" on record : Enable this option if the Sugar record's Assigned To field should also be updated according to the process user chosen in the previous field. The Process Author engine will make this update automatically.

Click "Save" to preserve these settings and return to the visual designer canvas.

Round Robin

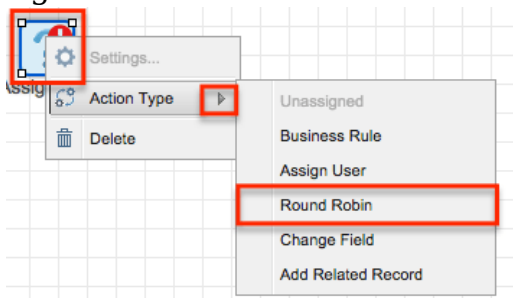
This Action type will assign the overall process flow to the members of a team in a

take-your-turn fashion. Round Robin actions should be followed by an [Activity](#) for the process user to complete. For example, if Jim and Sally belong to team "East", a Round Robin distribution for team East will assign the upcoming activity to Jim the first time it runs, to Sally the second time it runs, and then to Jim again on the third execution (and so on).

Note: The processing order of Round Robin activities is based on the Created By date of the user record in the Users module.

Follow these steps to add a Round Robin action to the process definition:

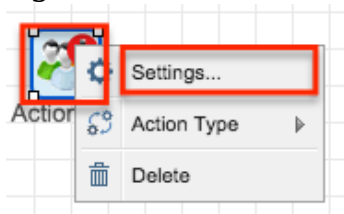
1. Right click on the Action icon and then select Action Type > "Round Robin":



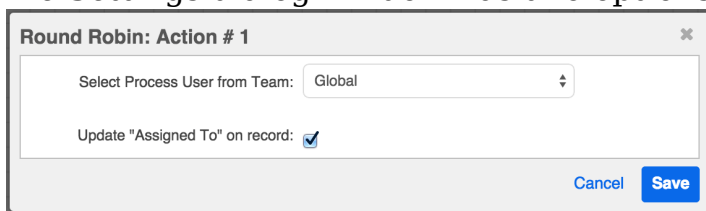
2. The Action's icon will change to:



3. Right click on the icon and choose "Settings":



4. The Settings dialog window has two options:



- Select Process User from Team : Select the name of the team from which a member will be chosen to be responsible for the remaining process steps.
 - Update "Assigned To" on Record : Enable this option if the Sugar record's Assigned To field should also be updated according to the team member chosen in the previous field.
5. Click "Save" to preserve these settings and return to the visual designer

canvas.

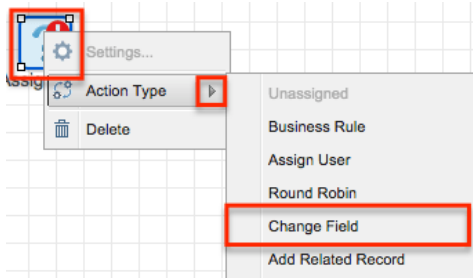
Change Field

This Action type will change the value of one or more fields on the target Sugar record or on a record related to the target Sugar record with a one-to-one or many-to-one relationship. Please note that calculated fields, including the Forecast field in the Revenue Line Items module (or in the Opportunities module if Revenue Line Items are disabled), cannot be modified by a Change Field action.

Note: If a Change Field action is not properly configured, the flow will ignore the action and continue running without changing any fields.

Follow these steps to add a Change Field action to the process definition:

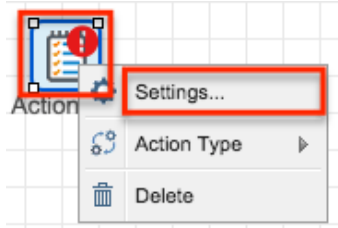
1. Right click on the Action icon and then select Action Type > "Change Field":



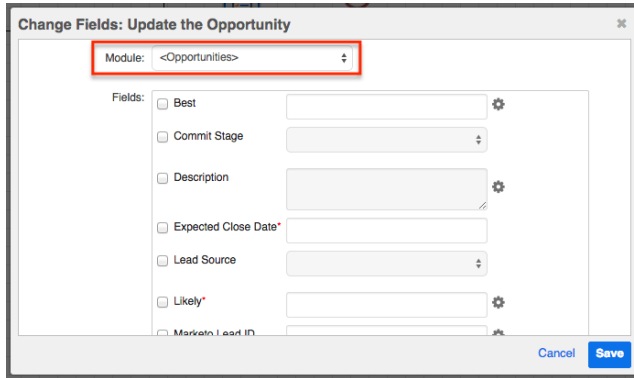
2. The Action's icon will change to:



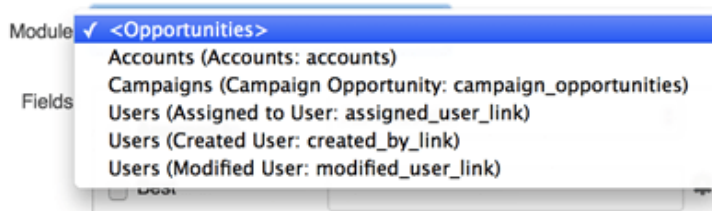
3. Right click on the icon again and choose "Settings":



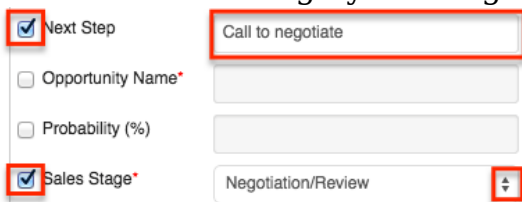
4. The Change Fields window will appear. The Module field will be pre-populated according to the target module specified in the process definition's record view, and that module's available fields will be listed below.





- Optionally, click on the Module field to edit a record in a module related to the target module. Only modules with a one-to-one or many-to-one relationship to the target module will be available.



- To have the process definition update a particular field, you must first enable that field for editing by clicking inside the field's adjacent checkbox.

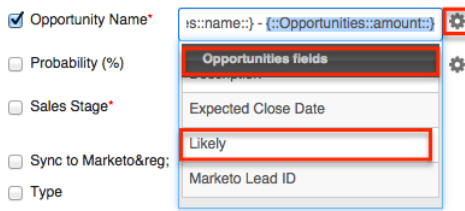


Note: Each field will be locked from editing until its corresponding checkbox is selected.

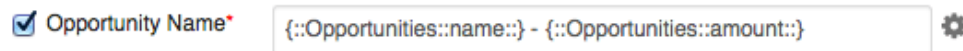
- Enter or select the desired field value. Fields that display a settings  icon support advanced configurations:
 - Text Fields : To specify the value of a text field, use any combination of Sugar field variables and text strings. For example, to append the Opportunity's Likely Amount to an existing Opportunity name, follow these steps:
 - Enable the checkmark next to the field name that you want to edit, and then click on the settings icon next to the empty field:
 
 - Click on Opportunities Fields > Opportunity Name. This will insert a variable into the Opportunity Name field that references the current value of the field when the corresponding process reaches this point in the flow.



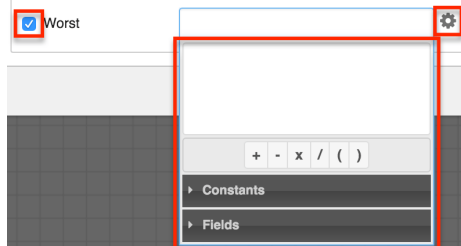
- Place the cursor inside the field immediately after the variable and type a space or hyphen character for formatting.
- Click on the Settings icon again.
- Click on Opportunities Fields > Likely to insert a second field variable.



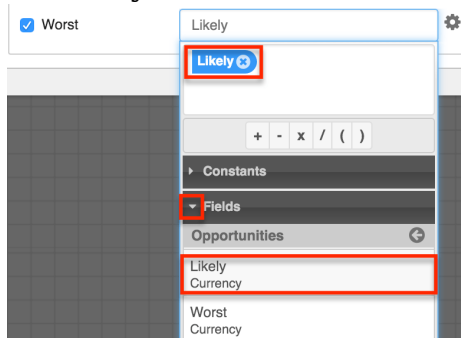
- When the formula is complete, the field value container will look similar to this:



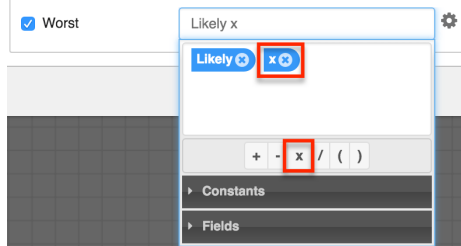
- In this example, a \$100 opportunity named "5 Widgets" will be updated to "5 Widgets - \$100".
- Number Fields : To create a calculated value for number fields, use some combination of operators, Sugar variables, and constants. For example, to calculate the Worst Amount field to contain 50% of the value of the Likely Amount field, follow these steps:
 - Enable the checkmark next to the field name that you want to edit, and then click on the settings icon next to the empty field:



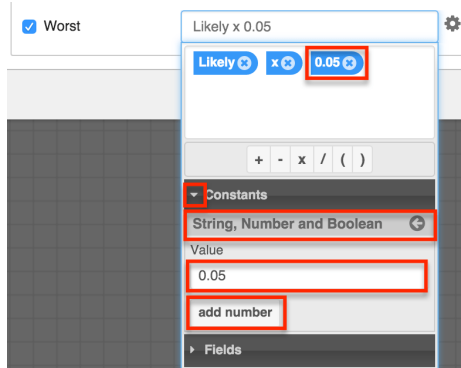
- In the formula builder, place the variable for "Likely Currency" onto the criteria window by clicking on Fields > Opportunities > Likely Currency. This will automatically add the variable to the window:



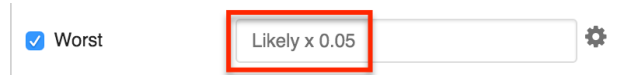
- Click on the multiply (x) operator from the operators list to add it to the formula window:



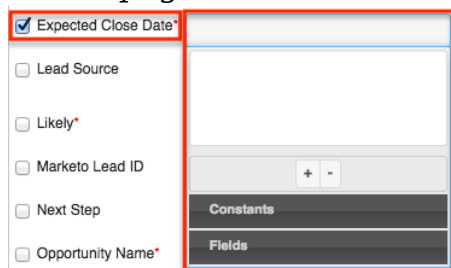
- Now tell the formula builder to multiply the Likely amount by half, or 0.5. Click on Constants > String, Number and Boolean > type "0.5" in the Value field (with no quotes) and then click "Add Number" to move the value to the formula builder canvas



- When the formula is complete, click away from the formula builder window to see the formula in the field value container:



- Date Fields : Date and datetime fields will reveal a criteria builder where the admin can calculate a particular value. Please see the Fixed Dates section of the [Creating Conditions for Events and Actions](#) documentation on this page to learn how to configure date fields.



8. Click "Save" to preserve these settings and return to the Visual Designer canvas.

Note: If a Change Field action references a field variable that is also changed by the action, the variable will reflect the value of the field before the change field action executes. For example, if the action changes the Probability field to {probability + 1}, and the same action also inserts the Probability field variable into the Description field, after saving, the description will display {probability} and the Probability field will equal {probability + 1}.

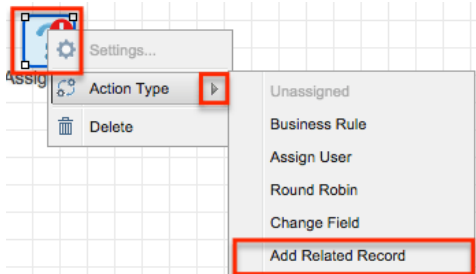
Add Related Record

This Action type will create a new Sugar record and relate it to the target Sugar record. Please note that the values of calculated fields, including the Forecast field in the Revenue Line Items module (or in the Opportunities module if Revenue Line Items are disabled), cannot be directly modified by an Add Related Record action.

Note: If an Add Related Record action is not properly configured, the flow will ignore the action and continue running without creating a new record.

Follow these steps to add an Add Related Record action to the process definition:

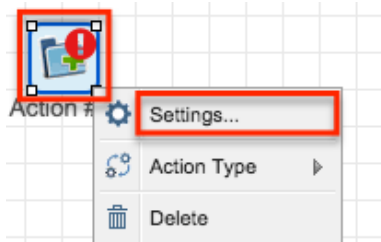
1. Right click on the Action icon and then select Action Type > "Add Related Record":



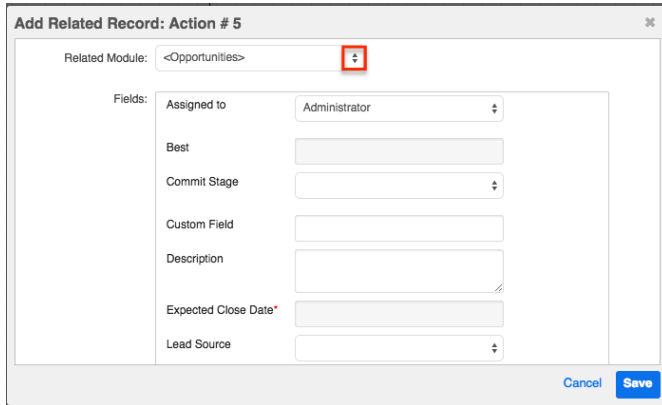
2. The Action's icon will change to:



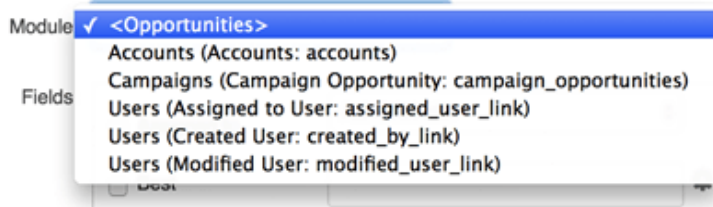
3. Right click on the icon and choose "Settings":



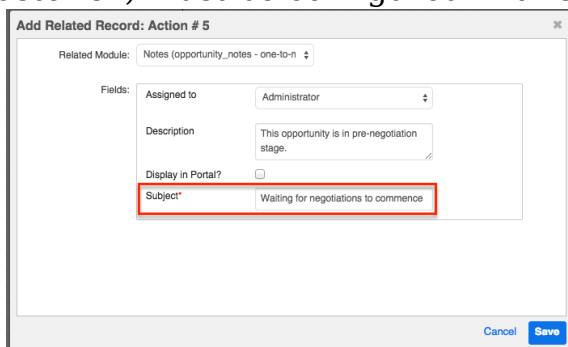
4. The Add Related Record window will appear. The Related Module field will be pre-populated according to the target module specified in the process definition's record view.





5. Click on the Related Module field to select the record type that the process will create. Only modules with a one-to-many or many-to-many relationship to the target module will be available.

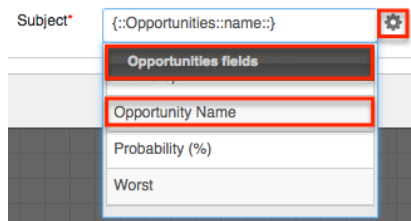


6. Complete the fields that the Process Author engine will populate in the related record. Any fields that are required by the module (indicated by a red asterisk) must be configured in this step.

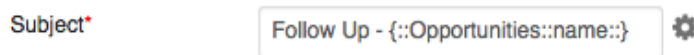


Fields that display a settings  icon support advanced configurations:

- Text Fields : To specify the value of a text field, use any combination of Sugar field variables and text strings. For example, when creating a follow-up task related to a target opportunity, follow these steps to use the opportunity's Name field in the subject of the task:
 1. Click on the settings  icon next to the empty field, then choose Opportunities Fields > Opportunity Name. This will insert a variable into the Subject field that references the opportunity when the corresponding process reaches this point in the flow.



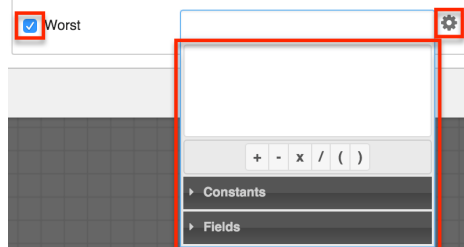
2. Place the cursor inside the field immediately before the variable and type "Follow up: " Include a space or hyphen character for formatting.
3. When the formula is complete, the field value container will look similar to this:



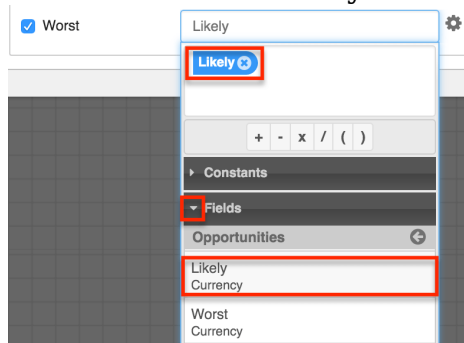
In this example, a task related to an opportunity named "5 Widgets" will have the subject "Follow up - 5 Widgets".

7. Number Fields : To create a calculated value for number fields, use some combination of operators, Sugar variables, and constants. For example, to calculate the Worst Amount field to contain 50% of the value of the Likely Amount field, follow these steps:

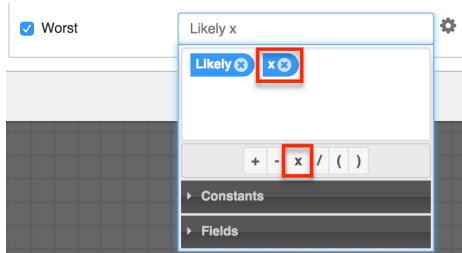
1. Click on the settings icon next to the empty field:



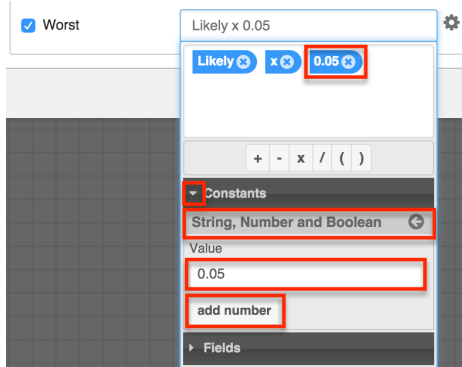
2. In the formula builder, place the variable for "Likely Currency" onto the criteria window by clicking on Fields > Opportunities > Likely Currency. This will automatically add the variable to the window:



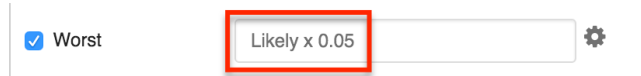
3. Click on the multiply (x) operator from the operators list to add it to the formula window:



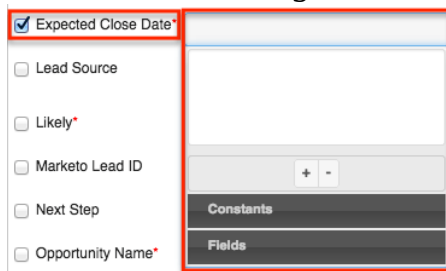
- Now tell the formula builder to multiply the Likely amount by half, or 0.5. Click on Constants > String, Number and Boolean > type "0.5" in the Value field (with no quotes) and then click "Add Number" to move the value to the formula builder canvas.



- When the formula is complete, click away from the formula builder window to see the formula in the field value container:



- Date Fields : Date and datetime fields will reveal a criteria builder where the admin can calculate a particular value. Please see the Fixed Dates section of the [Creating Conditions for Events and Actions](#) documentation on this page to learn how to configure date fields.

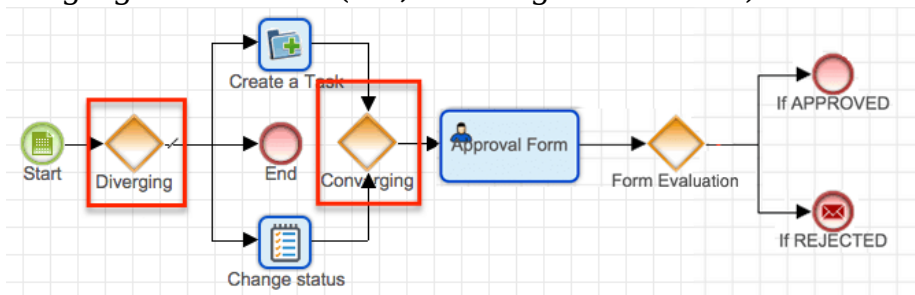


- Click "Save" to preserve these settings and return to the Visual Designer canvas.

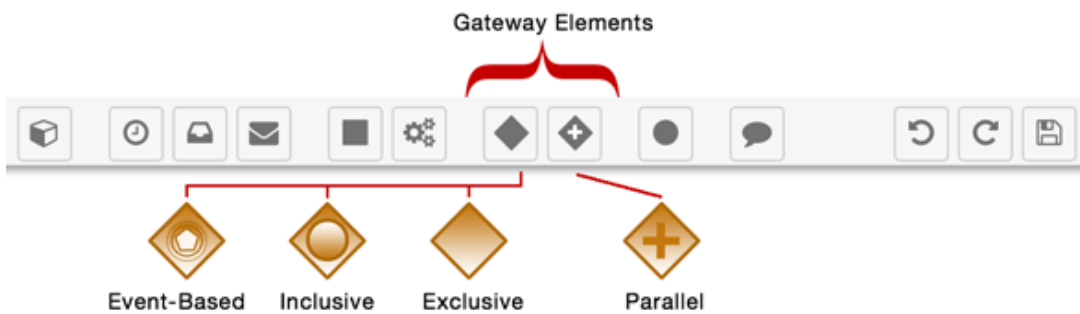
Adding Gateway Elements

Gateways are connective elements used to control the flow of a process via merging and splitting. When a single activity may result in several different outcomes, a Gateway serves as a splitting mechanism (i.e., divergent element). When several activities may result in a common outcome, a Gateway serves as a

merging mechanism (i.e., convergent element).



A Gateway is represented as a diamond in the Visual Designer and by the fourth group of icons on the design toolbar. There are two icons that each enable at least one type of configurable divergent or convergent moment. To add a Gateway element to a process definition, drag and drop one of the two Gateway icons onto the designer canvas. Right click on the diamond-shaped icon that appears in order to define a Gateway type, direction, and configure its settings.



The four types of Gateways are explained in the following sections.

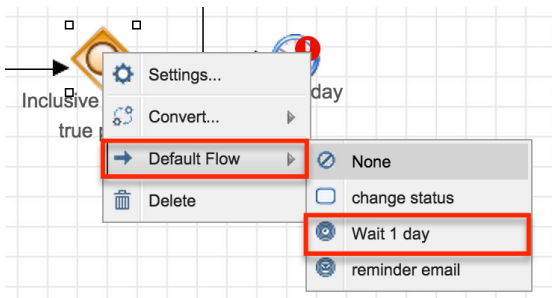
| Gateway Type | Divergent | Convergent | Use |
|-----------------------------------|-----------|------------|--|
| Exclusive Gateway | □ | □ | When divergent, determines a single outgoing path; When convergent, accepts only the flow that reaches it first |
| Inclusive Gateway | □ | | Evaluates all criteria to determine one or more outgoing paths |
| Parallel Gateway | □ | □ | When divergent, begins the concurrent execution of all |

| | | | |
|-------------------------------------|---|--|---|
| | | | outgoing paths; When convergent, waits for completion of all concurrent paths |
| Event-Based Gateway | □ | | Evaluates Wait events and Receive Message events |

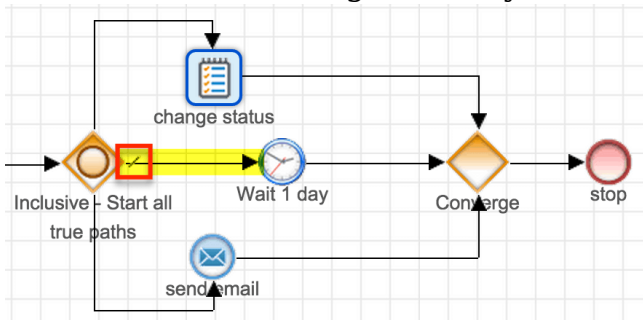
Default Sequence Flows

Default sequence flows are outgoing [sequence connectors](#) for exclusive, inclusive, and conditional gateways. Default sequence flows represent the path your process takes when none of the defined conditions evaluate to true. The default flow element should be defined before you configure any criteria for the outgoing flows. Default flow elements require no conditions and will therefore not have a corresponding Criteria field in the Gateway's criteria builder pop-up. For more information on setting Gateway criteria, please refer to the [Creating Conditions for Events and Actions](#) section of this documentation.

To define a default sequence flow, first connect the Gateway to all possible outcome elements. Next, right click on the Gateway icon and hover over the Default Flow option. A menu will appear listing all of the potential flow routes from the Gateway. Select the element that should occur when no criteria are met by the others.



After defining the default flow, the sequence connector leading to the default flow element will be distinguished by a small hash mark through the connector line:



For more information on interacting with sequence connectors, please refer to the

Exclusive Gateways



Exclusive gateways can be used to diverge or converge flow elements in a process. Exclusive gateways will evaluate several conditions but only direct the flow to or from a single path in the flow.

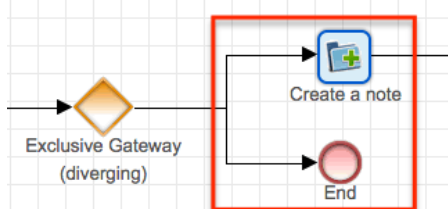
Divergent Exclusive Gateway

Only one path will succeed from an Exclusive gateway, and it will be the one that first accomplishes its criteria. You must define a [default flow](#) for Exclusive gateways to account for situations where all criteria are false.

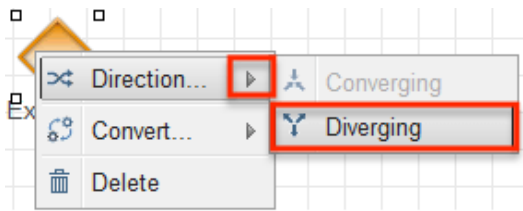
- If several criteria are true, the flow will be routed through the first (topmost) flow that evaluates as true.
- If no criteria are true, the flow will be routed through the default flow. If you have not set a default flow, the process definition will be blocked by this element.

Follow these steps to configure a divergent Exclusive gateway:

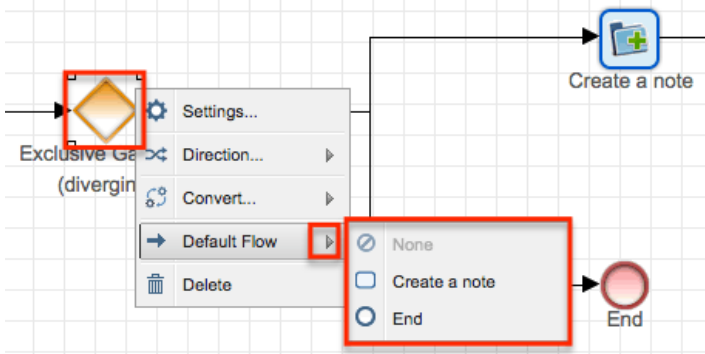
1. Drag the Exclusive gateway icon onto the designer canvas.
2. A divergent Gateway requires two or more subsequent elements (any combination of intermediate events, end events, actions, and/or activities). These must be placed on the canvas and [connectors](#) must join the elements on the canvas before the Gateway can be configured.



3. Once the Gateway has been connected to the subsequent elements, right click on the Gateway icon and select **Direction > Diverging**:

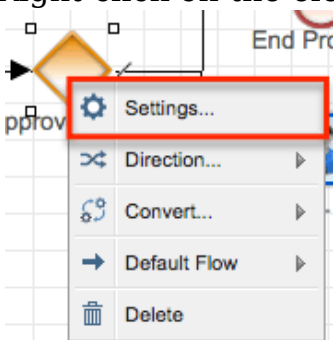


- Specify a [default flow](#) for the Gateway. If no criteria are fulfilled, the flow will be routed through the default one. From the visual designer canvas, right click on the Gateway icon and hover over the Default Flow option. A menu will appear listing all of the potential flow routes from the Gateway. Select the element that should occur when no criteria are met by the others.

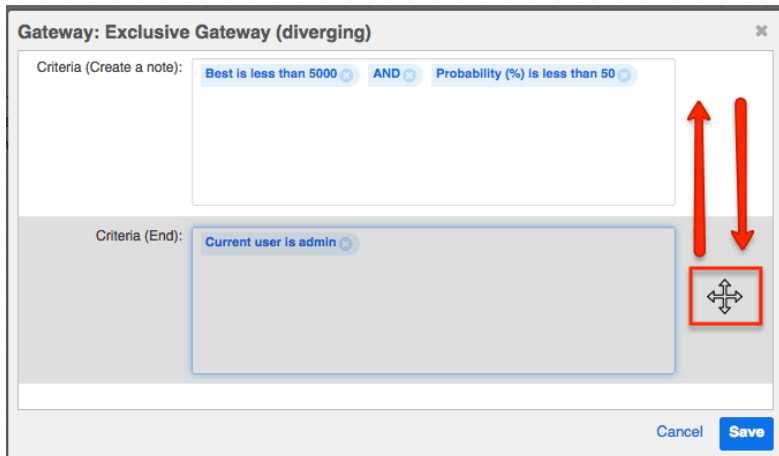


Note: The route set as default will not appear in the Criteria configuration window (step 6).

- Right click on the element again and select the option "Settings".



- A pop-up window will appear with a separate Criteria field for each potential outcome except the default one, which requires no criteria.
 - Click inside each criteria field to display the criteria builder tool. Refer to the [Creating Conditions for Events and Actions](#) section of this page for criteria builder instructions.
 - Drag and drop the Criteria fields in descending order of priority.

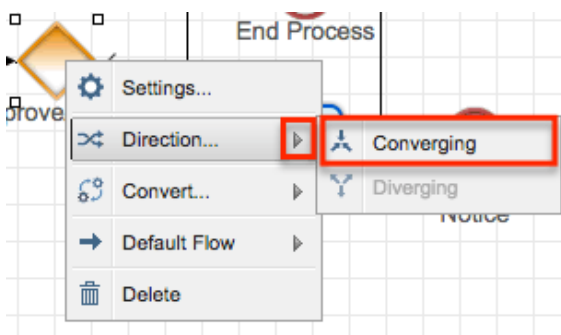


The criteria will be evaluated as they are presented in this window from top to bottom. Only one path will succeed from an Exclusive gateway, and it will be the one that first accomplishes its criteria. The remaining criteria will not be evaluated. If no criteria are fulfilled, the default flow will succeed (see step 4).

7. Click "Save" to return to the design canvas and continue building the process definition.

Convergent Exclusive Gateway

This Gateway joins multiple streams in a single thread, but only accepts the first flow that reaches the Gateway; the other flows will not be evaluated after that. There are no settings for this element. To configure this Gateway as a convergent element, right click on the Gateway element and select Direction > Converging:



Inclusive Gateways



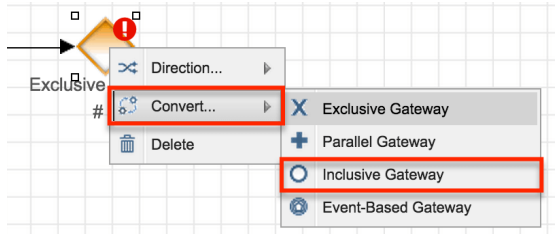
Inclusive gateways are divergent elements that direct a process' flow along all of the paths that accomplish their criteria. This may result in one flow or multiple

parallel flows. You must define a [default flow](#) for Inclusive gateways to account for situations where all criteria are false.

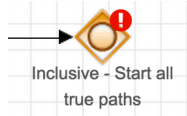
- If only one set of criteria evaluates as true, the flow will follow that single path.
- If several criteria are true, the flow will be routed in parallel along all paths that evaluate as true.
- If no criteria are true, the flow will be routed through the default flow. If you have not set a default flow, the Process Definition will be blocked by this element.

Follow these steps to configure an Inclusive gateway:

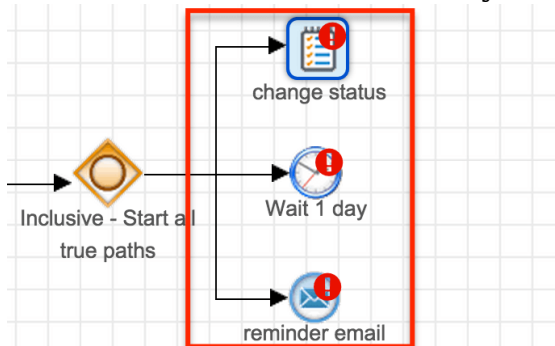
1. Drag the Exclusive gateway icon onto the designer canvas.
2. Right click on the Gateway icon and select Convert > Inclusive Gateway.



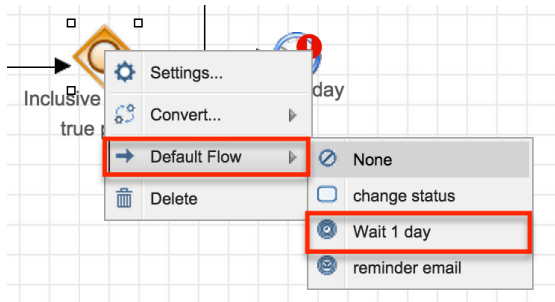
- The icon will transform from an empty diamond to a diamond containing a circle.
- Please note that the label will not automatically update and may still be labeled as "Exclusive". Edit this label as appropriate for your process.



3. A divergent Gateway requires two or more subsequent elements (any combination of intermediate events, end events, actions, and/or activities). These must be placed on the canvas and [connectors](#) must join the elements on the canvas before the Gateway can be configured.

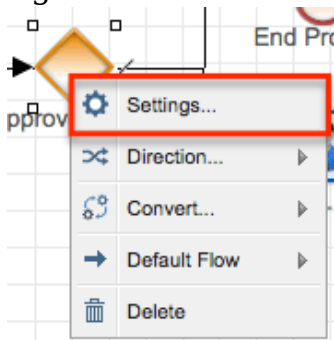


4. Once the Gateway has been connected to the subsequent elements, specify a



Note: The route set as default will not appear in the Criteria configuration window (step 6).

5. Right click on the Gateway again and select "Settings".



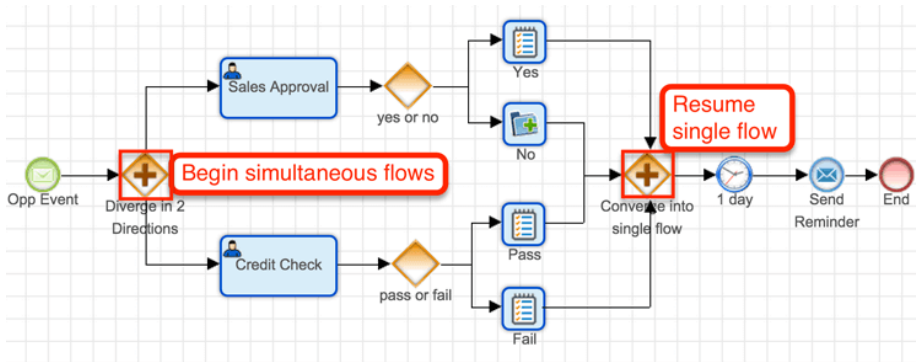
6. A pop-up window will appear with a separate Criteria field for each potential outcome except the default one, which requires no criteria. Click inside each criteria field to display the criteria builder tool. Refer to the [Creating Conditions for Events and Actions](#) section of this page for criteria builder instructions.
7. Click "Save" to return to the design canvas and continue building the process definition.

Parallel Gateways



Use a Parallel gateway in a complex process that has multiple things happening all at once (or "parallel" to each other). Unlike other gateways, there is no evaluation inside this gateway; it simply tells the process that two or more flows are about to happen at the same time.

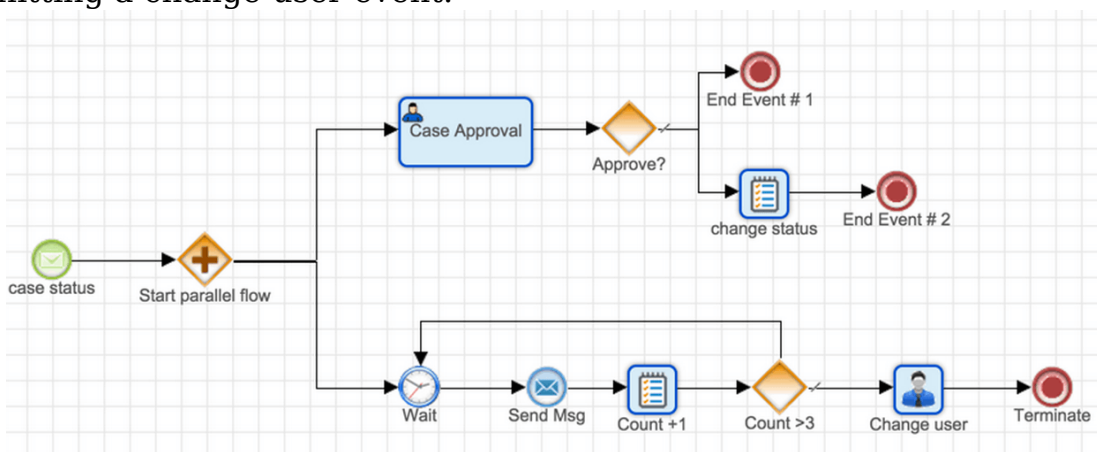
Parallel gateways can be divergent or convergent. Divergent Parallel gateways will direct parallel flows, whereas convergent Parallel gateways will receive parallel flows. The same gateway is used for diverging and converging:



Divergent Parallel Gateway

The divergent Parallel gateway divides the flow into two or more elements in parallel. For example, in the screenshot above, the process requires approval from the sales manager and a credit check from the accounting department. If you tried to use an Exclusive gateway for this, it would enforce only one of these options (sales approval OR credit check). But using a Parallel gateway, the process can branch off in both directions at the same time and then, optionally, converge later. If the parallel flows reconvene, use a convergent Parallel gateway to merge them.

The following example demonstrates a case-approval process where, if the case approval is ignored for x amount of time, the approval gets reassigned to someone else. The Parallel gateway is leveraged to kick off two separate functions. The top flow starts the approval and specifies behavior for approve/reject response. The bottom flow starts a timer that sends a reminder message three times before hitting a change-user event.



When using a divergent Parallel gateway, it is important to use the correct End-event type in your process. In the case-approval example, all three end events are set to "Terminate". This means that, if a flow hits any one of the three terminate events, then the entire process will stop running.

-
- Do Nothing : Ends the current branch; prevents parallel process branches from stopping prematurely
 - Terminate Process : Stops the entire process; will terminate all parallel branches even if there are steps remaining

Convergent Parallel Gateway

A convergent Parallel gateway joins multiple streams into a single thread. The process flow will re-commence only when all of the flows that converge into this gateway have arrived. There are no configuration settings for this gateway.

Event-Based Gateways

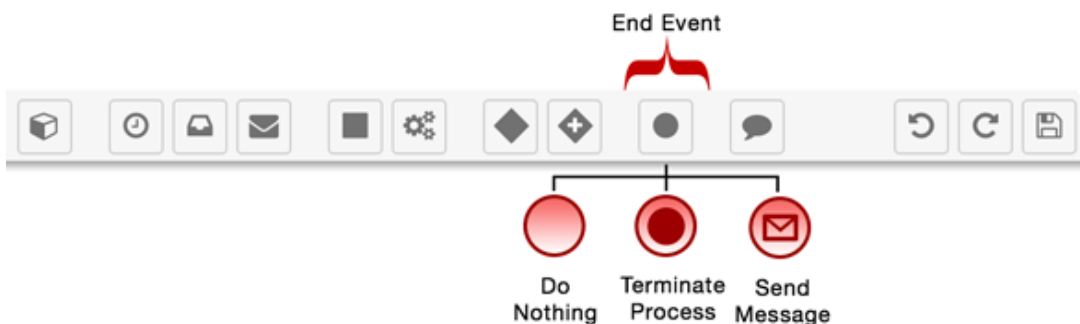


Event-based gateways evaluate only Wait events or Receive Message events. They are similar to exclusive gateways except that they evaluate whether an event has occurred rather than which condition has been met. Event-based gateways stop the process flow until one of the expected events are accomplished and then define the flow direction along a single path. There are no configuration settings for event-based gateways.

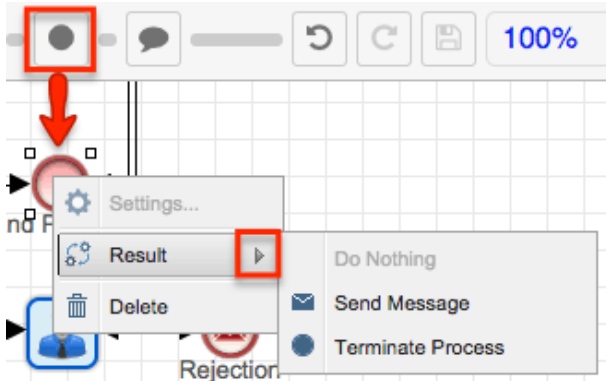
Drag and drop the gateway element onto the canvas; by default it will be set as Exclusive. To convert it into event-based, right click on the icon and select Convert > Event-Based Gateway.

Adding End Events

End events are represented by the fifth icon grouping on the design toolbar. There is one icon that can be configured three different ways after placing it on the Designer Canvas.



To define an End event type, drag the End event icon onto the Designer Canvas and then right click on the red circle. Choose "Result" from the menu, and then find the appropriate End event type. Note that the active End event type will be grayed out because it is already selected, and the default type is "Do Nothing".



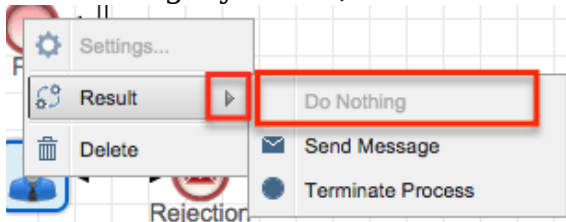
The three types of End event are:

Do Nothing



Most often used for sequential processes, this event ends a thread of the Process Definition without doing anything. It will not affect parallel threads that may be running simultaneously in the process. Those threads will continue to run uninterrupted by the Do Nothing End event. This event does not need any configuration; it is set by default when you drag and drop an End event onto the canvas.

To create a "Do Nothing" End event, drag and drop the End event icon into the canvas. Right click on the element icon and confirm that "Do Nothing" is grayed out by default in the "Result" menu, indicating that it is the active End event type. If it is not grayed out, click on "Do Nothing" to make it the active End event type.



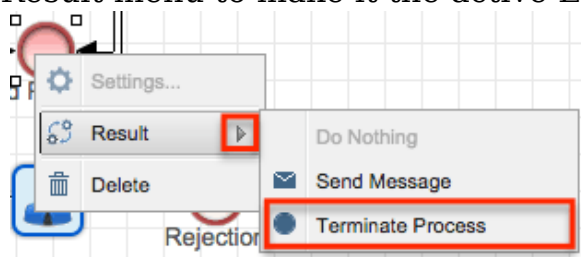
Terminate Process



Most often used for parallel processes, this event terminates the flow of the branch

for which it is designed while simultaneously terminating the entire process, regardless of any parallel events in the process definition. The Terminate Process event does not need any configuration.

To create a "Terminate Process" End event, drag and drop the End event icon into the canvas. Right click on the element icon then choose "Terminate Process" in the Result menu to make it the active End event type.



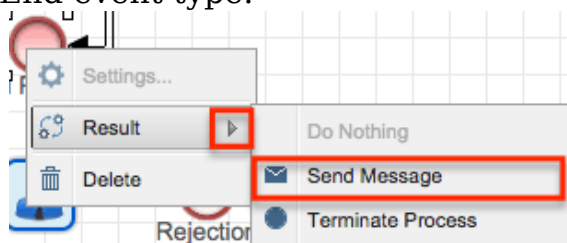
Send Message



The Send Message End event will signify the end of a process by emailing a message created in the [Process Email Templates](#) module to specified recipients. Please note that Sugar Process Author can only send email templates created in the Process Email Templates module and cannot send email messages created in any other part of the Sugar application. If no Process Email Template is specified in the event configuration, then the Process will terminate but no message will be sent.

To create a Send Message End event, follow these steps:

1. Drag and drop the End event icon into the canvas. Right click on the element icon then choose "Send Message" in the Result menu to make this the active End event type.



2. Right click on the canvas icon and select the option "Settings" to configure the event. A new window will appear:

- Module : (required) Choose the module that was set as the Target Module for the template.
- Email Template : (required) Choose an email template from the dropdown list. This list will only show templates that use the target module specified in the previous field.
- To, Cc, Bcc : (required) Specify the message recipients. Click inside the text area to select variable users, select members of a Sugar team, and/or type one or more email addresses. Please refer to the [Send Message Events](#) section of this page for more information about configuring the To, Cc, and Bcc fields.

Setting Conditions

Conditional criteria may be defined for elements in a process definition based on , response forms, field values, related modules, specified users, and date intervals.

Creating Conditions for Events and Actions

Start event, End event, and all types of Action elements will display conditions as logical or mathematical operations, depending on the type of field that is under evaluation.

The available conditional components are:

- [Logical Operations](#) : Used in criteria builders for text and other non-numerical field types.
 - [Module Field Evaluation](#)
 - [User Evaluation](#)
- [Mathematical Operations](#) : Used in formula builders for date and numerical field types.
 - [Fixed Date](#)
 - [Time Span](#)
 - [Sugar Date Variables](#)

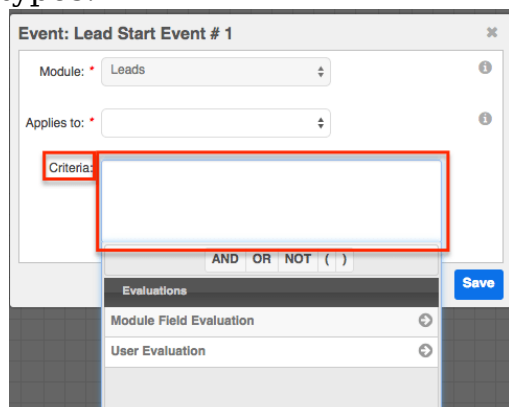
Logical Operations

Logical operations utilize logic operators in conjunction with the [Module Field Evaluation](#) and [User Evaluation](#) options to specify conditions for an event. For example, a Start event for opportunities may be limited to only opportunities containing a certain sales stage. Logical operations are defined inside a criteria builder in the process definition's design view.

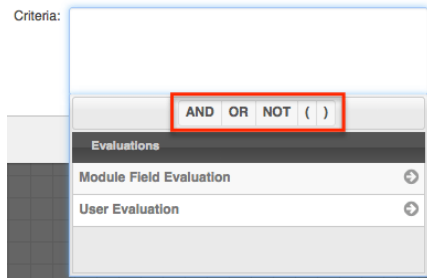
Note: Logical operations may be used in Start events and Send Message events.

The logical operations window will always contain a criteria field and logic operators:

- **Criteria field** : This is the field where the criteria will be constructed. Click inside the criteria field to reveal the logic operators and supportive evaluation types.



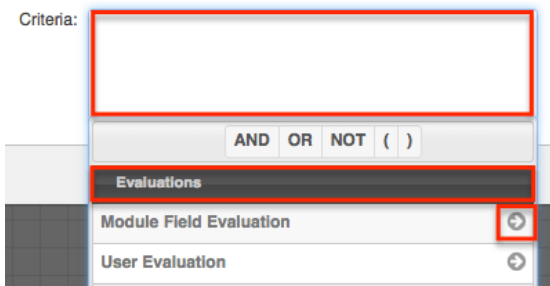
- Logical Operators : Click on the AND, OR and NOT buttons to create logical statements. Use the parentheses to group operations. Please note that TRUE, FALSE, NOW and NULL are also supported operators and can be entered manually.



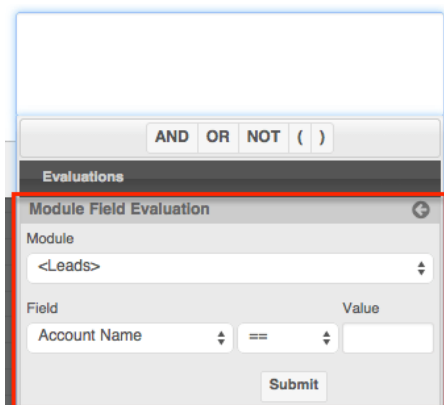
Module Field Evaluation

Note: Module Field Evaluations are logical operations that may be used in Start events and Send Message events.

To reveal the Module Field Evaluation panel, click inside the criteria field and then click on "Evaluations" and select "Module Field Evaluation":



The Module Field Evaluation panel consists of the following options:



- Module : Click the down arrow to list and select the related module whose values will be evaluated.
- Field : Click the down arrow to list and select the field variable of the chosen module.

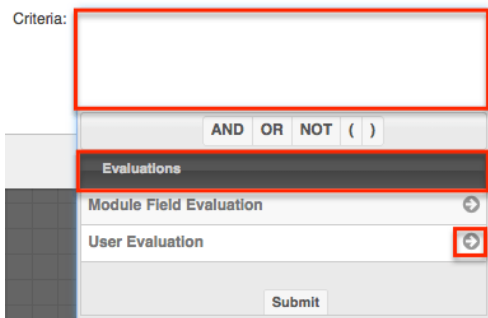
- Operator : Click the down arrow to list and select a comparative operator.
- Value : Enter a value to compare.
- Submit : Move the evaluation to the criteria field.

Note: Checkboxes are evaluated as "yes" or "no" (without quotes). Never use single quotes (' ') or double quotes (" ") inside the criteria builder; input types are automatically recognized when processing the condition.

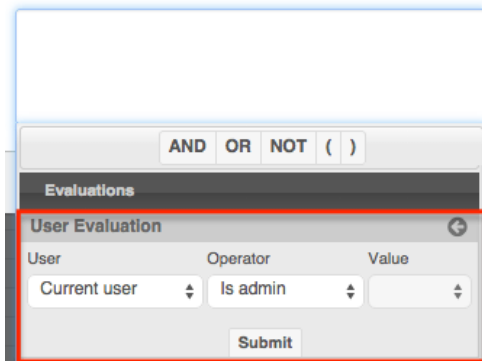
User Evaluation

Note: User Evaluations are logical operations that may be used in Start events and Send Message events.

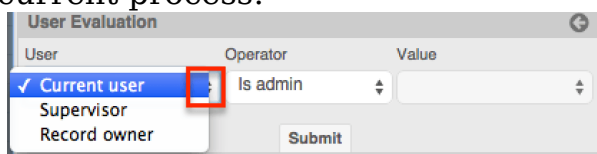
To reveal the User Evaluation panel, click inside the criteria field and then click on "Evaluations" and select "User Evaluation":



The User Evaluation panel consists of the following options:



- User : Click the down arrow to list and select the type of user related to the current process:

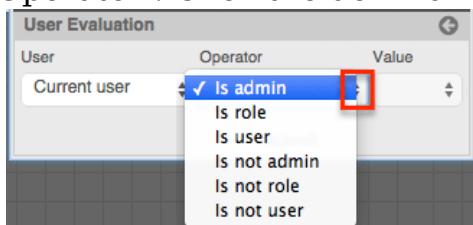


- Current User : For a Start event, the Current User refers to the user who

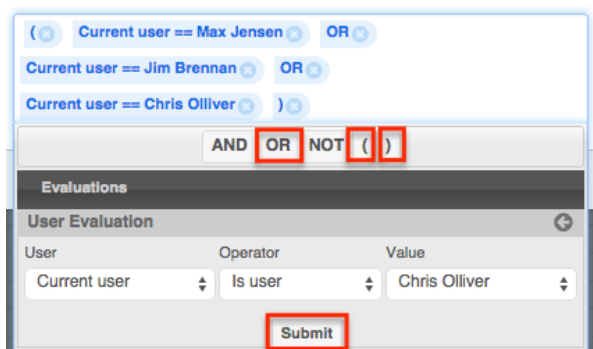
is assigned to the target record. For any other element, the Current User refers to the last user who has been defined in the process definition.

- Supervisor : applies to the supervisor of the logged-in user who triggers the process
- Record Owner : applies to the user who is assigned to the record that triggers the process

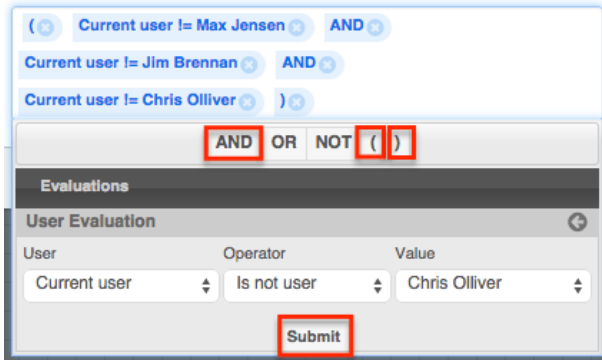
- Operator : Click the down arrow to select the comparison operator:



- Is admin : The condition will only evaluate as true if the user specified in the User field is an admin user. This option will complete the evaluation definition and disable the Value field.
- Is role : The condition will only evaluate as true if the user specified in the User field is a member of a certain role. This option will populate the Value field with a list of available user roles.
- Is user : The condition will only evaluate as true if the user specified in the User field is a specific user. This option will populate the Value field with a list of active users. To select multiple users, submit this evaluation once for each user and connect the evaluations with OR operators. Surround all of the User Evaluations with parentheses.



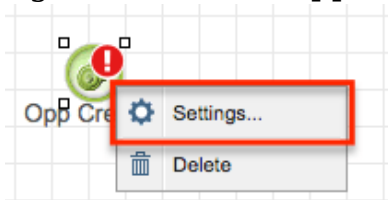
- Is not admin : The condition will only evaluate as true if the user specified in the User field is not an admin user. This option will complete the evaluation definition and disable the Value field.
- Is not role : The condition will only evaluate as true if the user specified in the User field is not a member of a certain role. This option will populate the Value field with a list of available user roles.
- Is not user : The condition will only evaluate as true if the user specified in the User field is not a specific user. This option will populate the Value field with a list of active users. To select multiple users, submit this evaluation once for each user and connect the evaluations with AND operators. Surround all of the User Evaluations with parentheses.



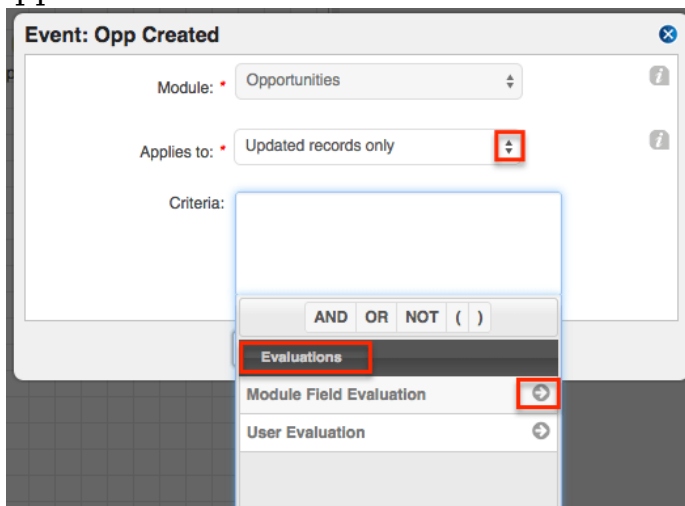
- Value : This field will be disabled if the Operator field is set to "Is admin" or "Is not admin". If the Operator is set to "Is user" or "Is not user", the Value field will load the User list as field options. If the Operator is set to "Is role" or "Is not role", the Value field will load the Roles list as field options.
- Submit : Move the evaluation to the criteria field.

Follow these steps to add a condition to a Start event:

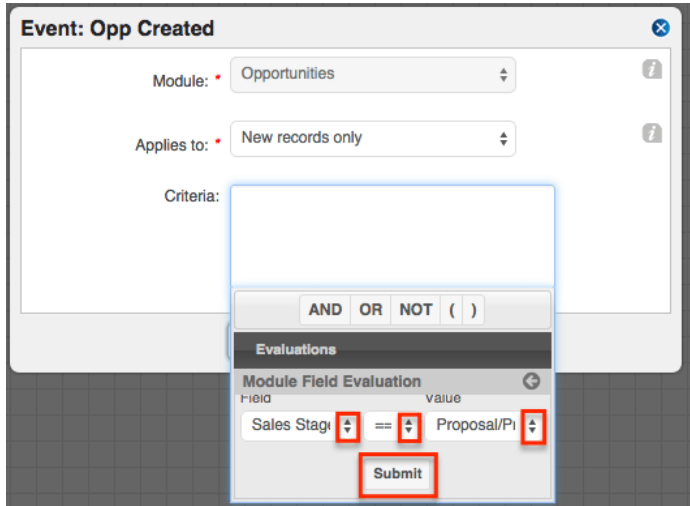
1. Right click on the opportunity Start event icon and choose "Settings".



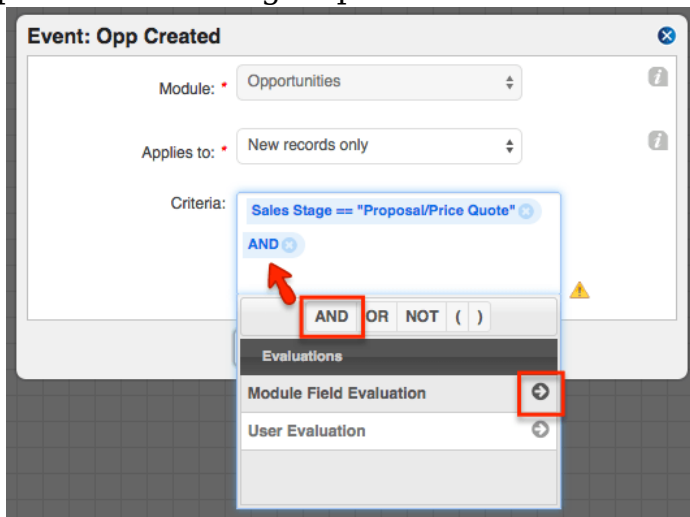
2. Click inside the criteria field and then click on "Evaluations" and select "Module Field Evaluation" to restrict this Process Definition to only certain opportunities.



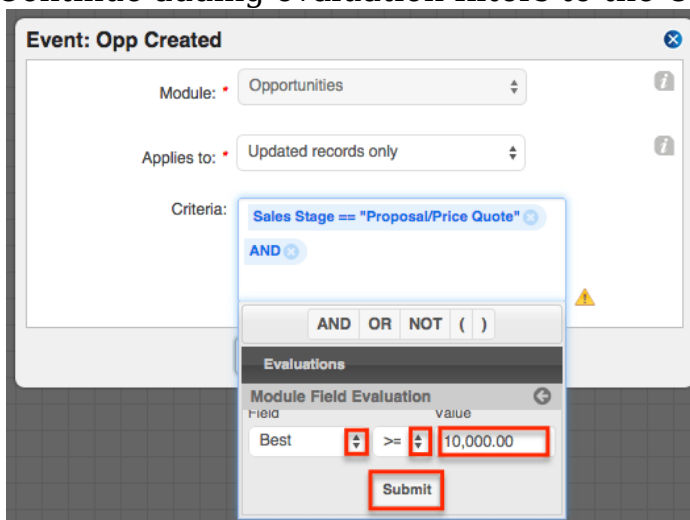
3. Choose a field, operator, and field value for the first condition and then click "Submit" to add the condition to the Criteria window.



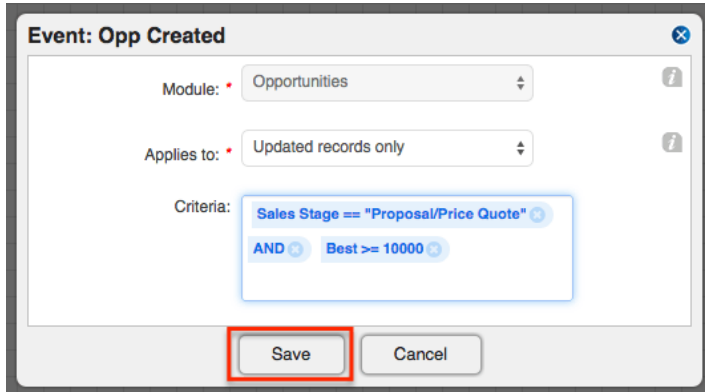
4. Use the boolean logic elements AND, OR, and NOT in conjunction with parentheses for grouped criteria to build a compound filter.



5. Continue adding evaluation filters to the Criteria window.



6. When satisfied, click outside of the Criteria field to close the Evaluations window and then click "Save".



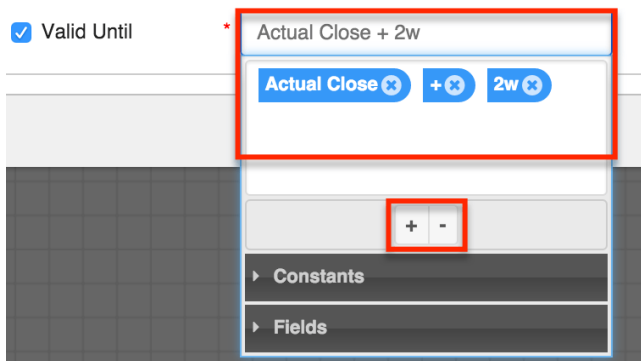
Mathematical Operations

Mathematical operations utilize mathematical operators in conjunction with the Fixed Date, Time Span, and Sugar Date variable options to specify conditions on an event. Mathematical operators can also be used to calculate a number value for a Sugar field using a combination of Sugar field variables and constant values. Mathematical operations are defined inside a formula builder in the process definition's design view.

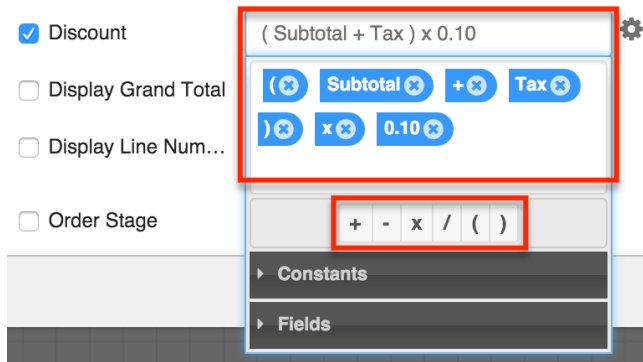
Note: Mathematical Operations may be used for Wait events, Change Field actions, and Add Related Record actions.

Mathematical operators primarily serve two purposes:

- **Calculating Dates** : Use addition (+) and subtraction (-) to create a date that is relative to another date. For example, set a quote as valid until two weeks after its close date:



- **Calculating Numeric Values** : Use addition (+), subtraction (-), multiplication (x), and division (/) to create a calculated value relative to another Sugar Field. Define a specific order of operations by leveraging parentheses in your formulas. For example, set a discount amount to 10% of the the sum of a record's subtotal plus tax:



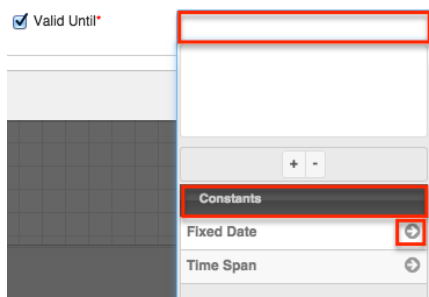
Fixed Date

The Fixed Date option enables the administrator to specify a formal, static date as a field value or as a variable in a formula that will calculate a field value. For example, if all opportunities in a process are expected to close at the end of the year, create a Change Field action that uses Fixed Date to change all opportunities' Expected Close Date fields to December 31, 2015.

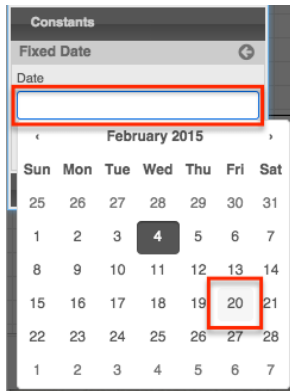
Note: Fixed Dates may be used in mathematical operations for Wait events, Change Field actions, and Add Related Record actions.

To reference a Fixed Date, follow these steps:

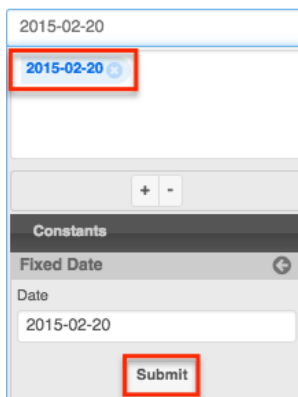
1. Click inside the date field and then click on "Constants" and select "Fixed Date":



2. The window will transition to a single Date field, Click inside the Date field to reveal a calendar picker. Navigate from month to month using the < (back) and > (forward) symbols near the month label. Click on the date that will be used in the formula.



3. Click the Submit button to move the selected date onto the formula builder canvas:



Note: If the date submitted in this step is the static date for the field value, then the formula is complete. If the Fixed Date is only one component of a larger formula that will be used to determine a field value, then the Fixed Date should be entered in the order it is expected in the formula along with a logical combination of Time Span, Sugar Date variables, and/or Mathematical Operators.

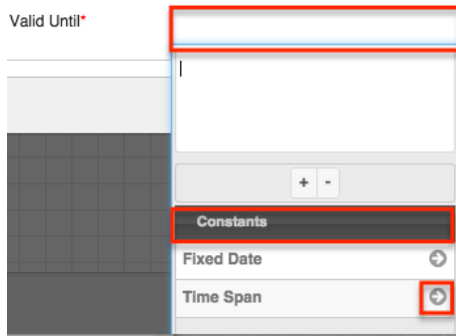
Time Span

The Time Span option allows the passage of time within a date formula. For example, if a Due Date should be set for two weeks after a record's Start Date, build a formula that uses Time Span "2 weeks" as a variable (Start Date + 2w).

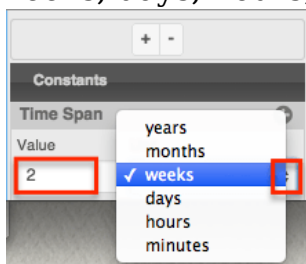
Note: Time Spans may be used in mathematical operations for Wait events, Change Field actions, and Add Related Record actions.

To reference a time span, follow these steps:

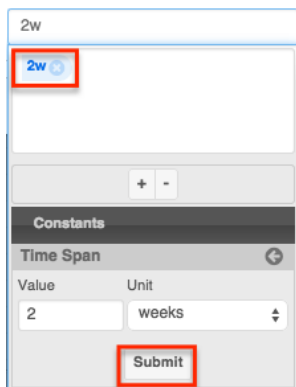
1. Click inside the date field and then click on "Constants" and select "Time Span":



2. The next window will display a Value field and a Units field. Use these two fields together to create a logical time span phrase (e.g., 2 weeks would be set as Value=2; Units=weeks). Time spans can be specified in years, months, weeks, days, hours, or minutes.



3. Click the Submit button to move the selected time span onto the formula builder canvas:



Note: If the time span is the only component of the date formula, it will be interpreted as {TODAY} + {TIME SPAN} where TODAY is the date and time that the process executes this element in the process definition. If the time span is only one component of a larger formula that will be used to determine a field value, then the time span should be entered in the order it is expected in the formula along with a logical combination of Fixed Date, Sugar Date variables, and/or Mathematical Operators.

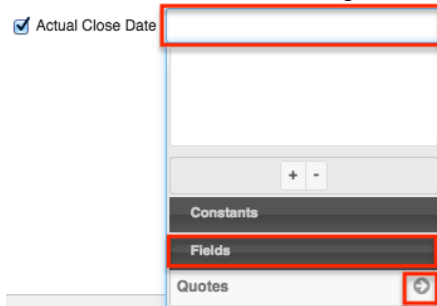
Sugar Date Variables

Sugar Date variables are references to date fields on a Sugar record. They can be used to add context to a date formula (e.g., Date Created + 1 month) or referenced independently (e.g., an action or event that triggers on Expected Close Date).

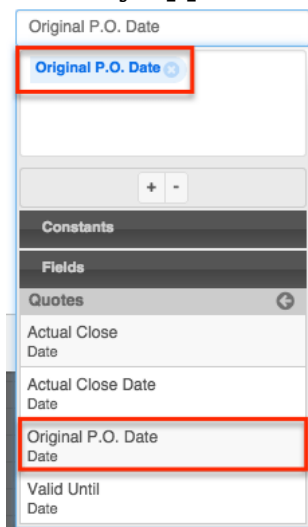
Note: Sugar Date variables may be used in mathematical operations for Wait events, Change Field actions, and Add Related Record actions.

To reference a Sugar date variable, follow these steps:

1. Click inside the date field and then click on "Fields". A list of available modules will appear (the target module and any available related modules). Click on the arrow adjacent to the desired module:



2. After clicking on the module name, the window will reveal a list of all available date fields for that module. Click on the date field and it will instantly appear in the formula builder window:



Note: If the date variable is the only component of the date formula, then the formula is complete. If the date variable is only one component of a larger formula that will be used to determine a field value, then the variable should be entered in the order it is expected in the formula along with a logical combination of Time Span, Fixed Dates, and/or Mathematical Operators.

Creating Conditions for Activities and Gateways

Form activities and gateway elements can evaluate user responses to forms or business rules that have been created by the administrator.

The available evaluations are:

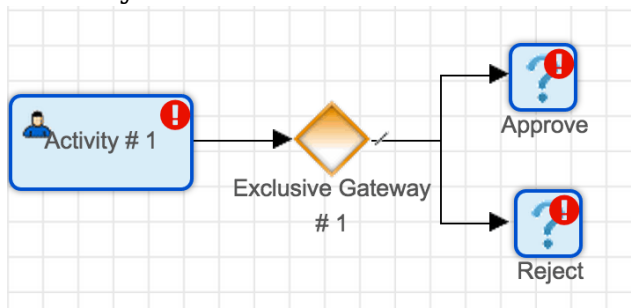
-
- [Form Response Evaluations](#) : Configure this type of criteria for gateways that follow a Form activity.
 - [Business Rule Evaluations](#): Configure this type of criteria for gateways that follow a business rule action.

Form Response Evaluations

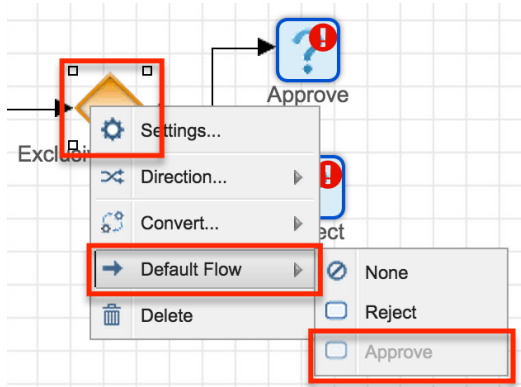
If a process contains an Approve/Reject activity, it must be followed by a gateway with a form response evaluation. To configure this evaluation, follow these steps:

Note: A divergent Gateway requires two or more subsequent elements (any combination of intermediate events, end events, actions, and/or activities). These must be placed on the canvas and connectors must join the elements on the canvas before the Gateway can be configured.

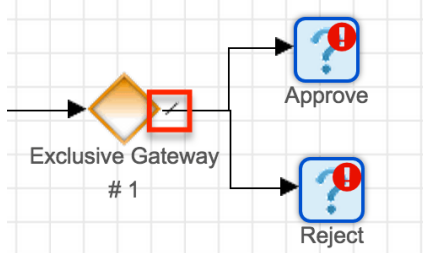
1. Drag an Activity element onto the design canvas as explained in [Adding Form Activities](#).
2. Drag an Exclusive gateway element onto the design canvas to the right of the Activity.
3. Drag two or more Actions or Events onto the canvas to the right of the Gateway.



4. Connect the activity to the gateway and the gateway to the subsequent elements using [Sequence Connectors](#).
5. Right click on the gateway element and specify a [default flow](#). This will be the direction that the flow takes if no criteria are accomplished within the gateway element. For this example, the default flow is set to the action labeled, "Approve". Please note that the default flow options will not be available until the corresponding elements have been placed on the canvas and connected to the gateway.



A hash mark will indicate that a default flow has been successfully configured:



6. Next, right click on the gateway element again and select "Settings". Note that only the non-default outcome or outcomes will need to be configured. For the current example, we set the default flow to "Approve" so there is one criteria window, which represents the one non-default element in this example.
7. Click inside the Criteria window to reveal evaluation options. The only required evaluation for a Form activity is the "Form Response Evaluation". Click on Evaluations > Form Response Evaluation and then select the form response that will result in the non-default flow. In this example, the form response must be "Rejected" or else the default flow will take over. Click "Submit" to move the condition to the Criteria window. If multiple criteria are required, click on the AND, OR, NOT, and parentheses operators as needed and insert additional conditional statements.

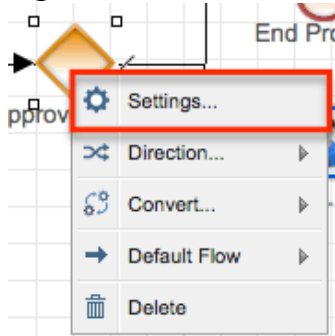
Note: Despite a Form activity having two outcomes (approval and rejection), it is possible to configure additional outcomes using a combination of criteria beyond the form response. For example, a separate outcome may be configured for:

- Form Response = Rejected AND Status = New
- Form Response = Approved AND Status = New

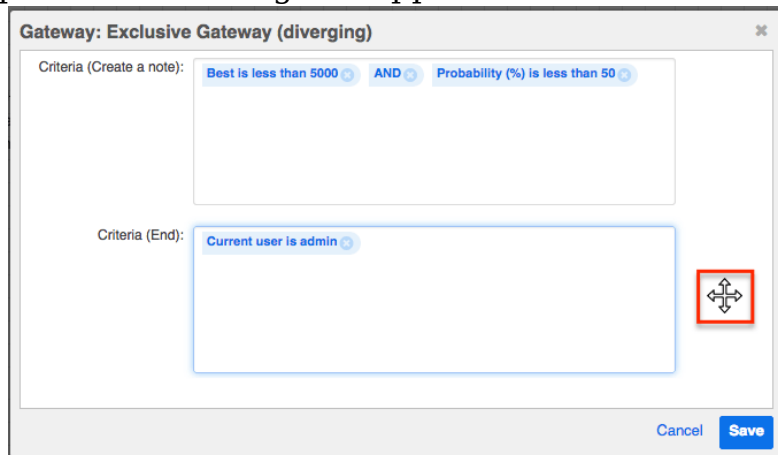
- Form Response = Approved AND Status = Closed
- else [Default Flow](#) : In other words, if none of the above criteria are accomplished, continue with the default flow element. Please note that the default element does not need to be configured. It will always be the outcome when all other criteria evaluate to false.

8. Only one outcome can occur from an Exclusive gateway, and it will be the one that accomplishes the condition. If several criteria are true, the priority will be higher on the one that lies further up the configuration. To change the priority order of a Gateway that is directed toward multiple elements:

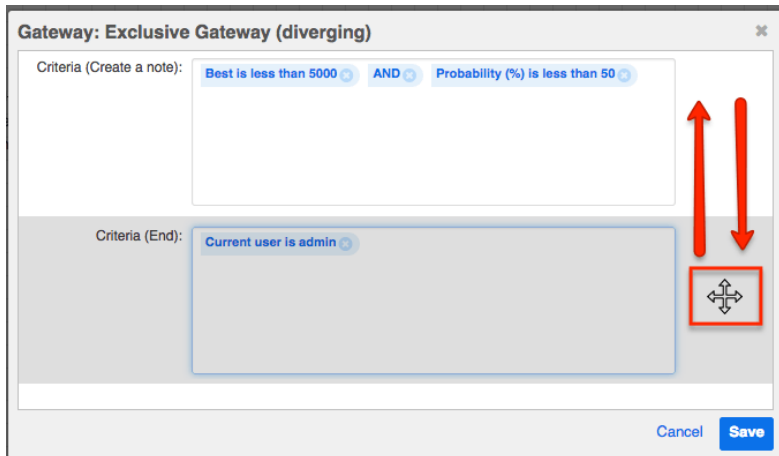
- Right click on the Gateway element and select the option "Settings".



- There will be a criteria builder window for each related element. Place the mouse pointer to the left or right side of the criteria fields and the pointer will change its appearance to a standard "move" cursor type.



- Drag and drop the criteria fields into the desired sequence. This order will set the priority of the Gateway criteria.



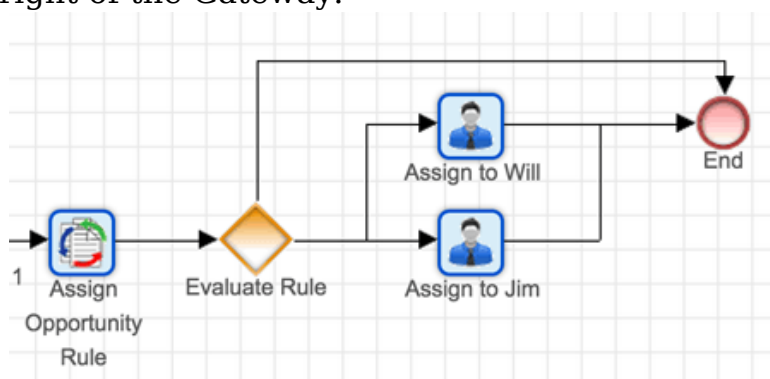
- When you are satisfied with the conditions and their processing order, click "Save" to preserve the changes and return to the visual designer canvas.

Business Rule Evaluations

When referencing a process business rule within a process definition, the action must be followed by a gateway with a business rules evaluation.

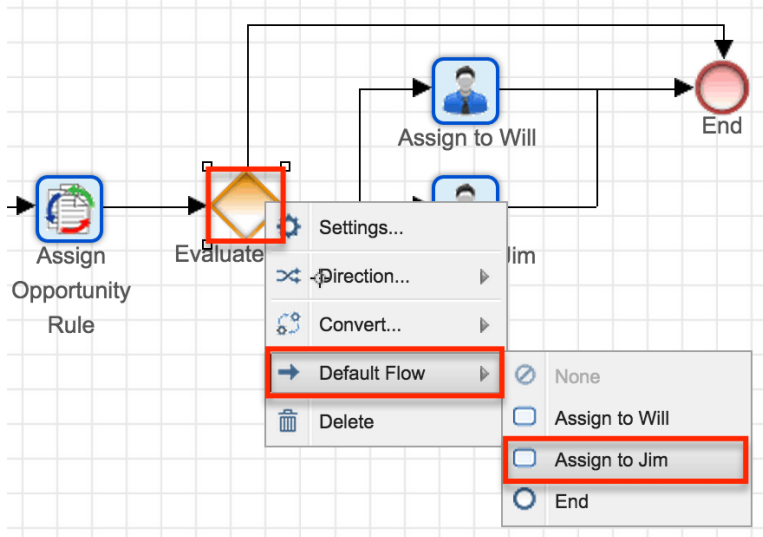
Note: A divergent Gateway requires two or more subsequent elements (any combination of intermediate events, end events, actions, and/or activities). These must be placed on the canvas and connectors must join the elements on the canvas before the Gateway can be configured.

1. Drag an Action element onto the design canvas and configure it as explained in the [Business Rule](#) section of this page.
2. Drag an Exclusive gateway element onto the design canvas to the right of the Action.
3. Drag two or more action, intermediate, or end events onto the canvas to the right of the Gateway.

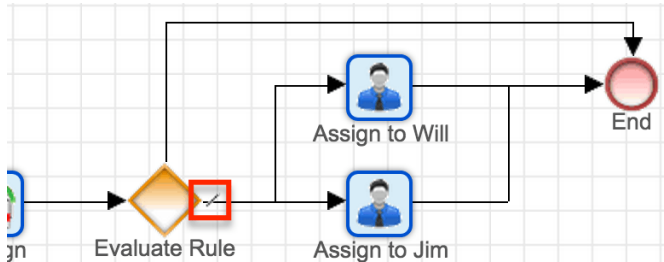


4. Connect the action to the gateway and the gateway to the subsequent elements using [Sequence Connectors](#). Notice that, in the example here, there are three potential outcomes for the gateway.

- Right click on the gateway element and specify a [default flow](#). This will be the direction that the flow takes if no criteria are accomplished within the gateway element. For this example, the default flow is set to the action labeled, "Assign to Jim". Please note that the default flow options will not be available until the corresponding elements have been placed on the canvas and connected to the gateway.



A hash mark will indicate that a default flow has been successfully configured:

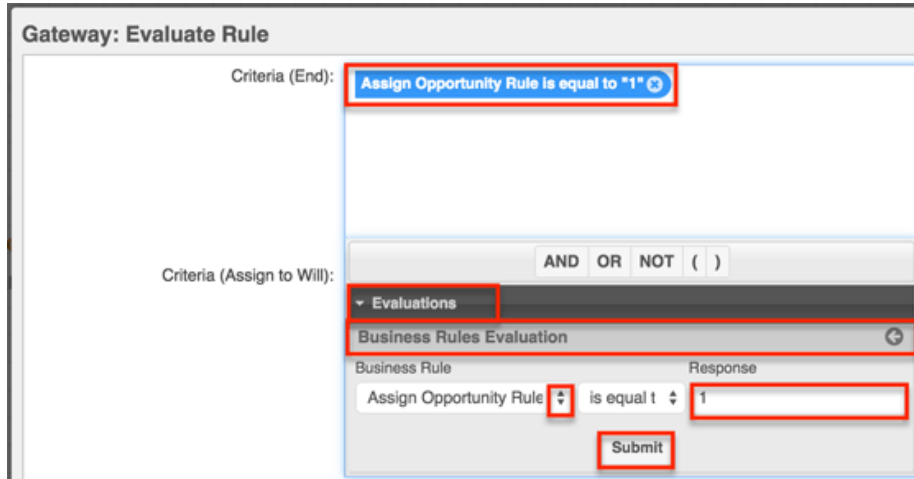


- Next, right click on the gateway element again and select "Settings". Only the non-default outcome or outcomes will need to be configured. For the current example, we set the default flow to "Assign to Jim" so there are two criteria windows, which represent the two non-default elements in this example.



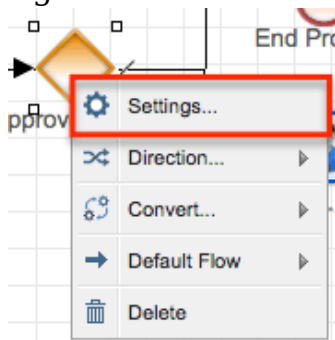
- Click inside the first Criteria window to reveal the evaluation options. The only required evaluation for a business rule is the "Business Rules Evaluation". Follow these steps to configure the Business Rules Evaluation:

8. Click on Evaluations > Business Rules Evaluation. The Business Rule field will appear and display all of the Business Rules that have been referenced by action elements in the current process definition.
9. Select the business rule that this gateway is evaluating.
10. The Response field will evaluate the "Return Value" designated in the process business rule. Type the Return Value that, when returned by the business rule, will result in the current process path. For example, if a Return Value of 1 causes the process to end, type "1" (no quotes) into the Response field for the End element's Criteria.

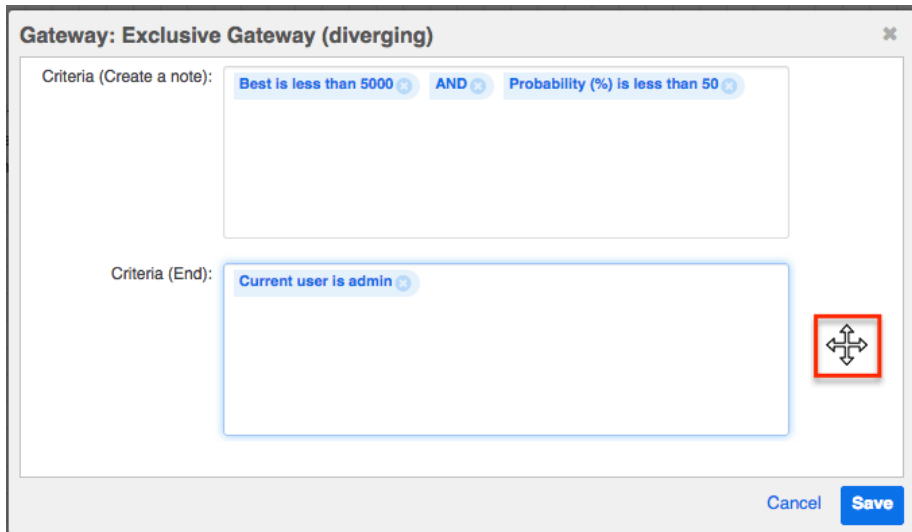


Note: Process business rule "Return Values" will always convert to text for evaluation within a process definition.

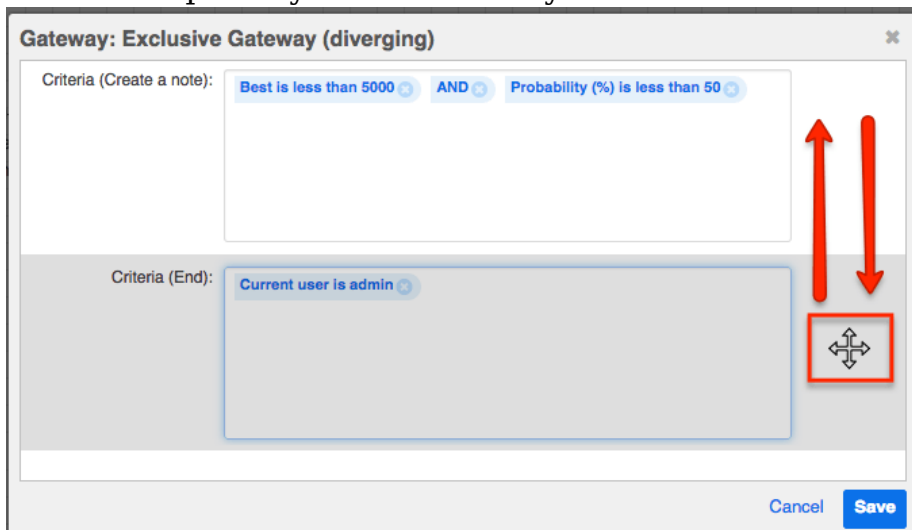
11. Click "Submit" to move the condition to the Criteria window.
12. If multiple criteria are required for any one flow direction, click on the AND, OR, NOT, and parentheses operators as needed and insert additional conditional statements.
13. Continue configuring Criteria for all possible flow outcomes.
14. Only one outcome can occur from an Exclusive gateway, and it will be the one that accomplishes the condition. If several criteria are true, the priority will be higher on the one that lies further up the configuration. To change the priority order of a Gateway that is directed toward multiple elements:
 - o Right click on the Gateway element and select the option "Settings".



- o There will be a criteria builder window for each related element. Place the mouse pointer to the left or right side of the criteria fields and the pointer will change its appearance to a standard "move" cursor type.



- Drag and drop the criteria fields into the desired sequence. This order will set the priority of the Gateway criteria.



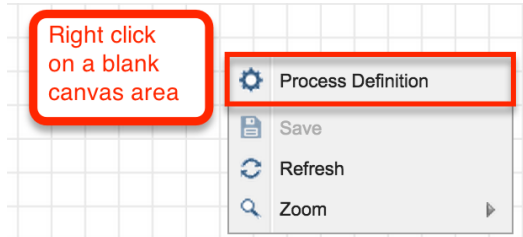
- When you are satisfied with the conditions and their processing order, click "Save" to preserve the changes and return to the visual designer canvas.

Configuring Process Termination Settings

A well-formed process definition will include termination conditions. If a process' target record meets these conditions, the process instance will force stop and display a status of "Terminated" in the Process Management list. This setting is important to prevent conflicts between multiple running processes or conflicts between Sugar Process Author and other automated parts of your Sugar instance (e.g. Workflows, Sugar Logic, or third party customizations).

Follow these steps to define termination conditions for a process definition:

1. Navigate to the Visual Design canvas for the relevant process definition.
2. Find a blank spot on the design canvas and right click to access the Process Definition's general settings.
3. Click on "Process Definition".



4. The Process Definition settings will appear. Here you can edit the record-level settings such as the Name and Description, but most importantly, set Terminate Process criteria for this process definition.

Process Definition

Process Name: Lead approval

Description: Process to facilitate the approval of high value leads

Module: Leads

Terminate Process:

Locked Fields:

- Account Description
- Account Name
- Alt Address City
- Alt Address Country
- Alt Address Postal Code
- Alt Address State

Cancel Save

5. Click inside the Terminate Process field to reveal the criteria builder.

Terminate Process:

Locked Fields:

AND OR NOT ()

Evaluations

Module Field Evaluation

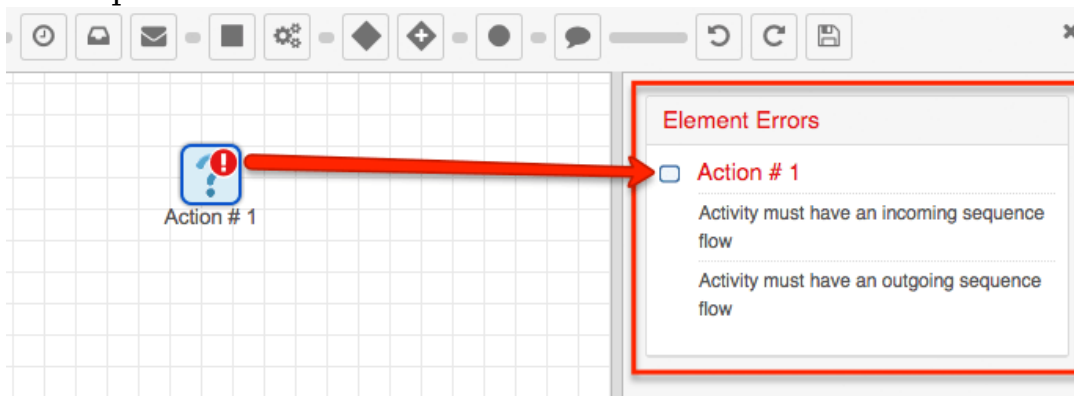
6. Refer to the [Module Field Evaluation](#) section of this page to build a conditional statement that, when met, will force-stop a running process that was triggered by this process definition. These criteria must apply to the target module of the process definition and cannot reference any related modules.



7. Click "Save" to preserve this setting and return to the design canvas. Be sure to save the overall process definition before navigating away from the canvas.

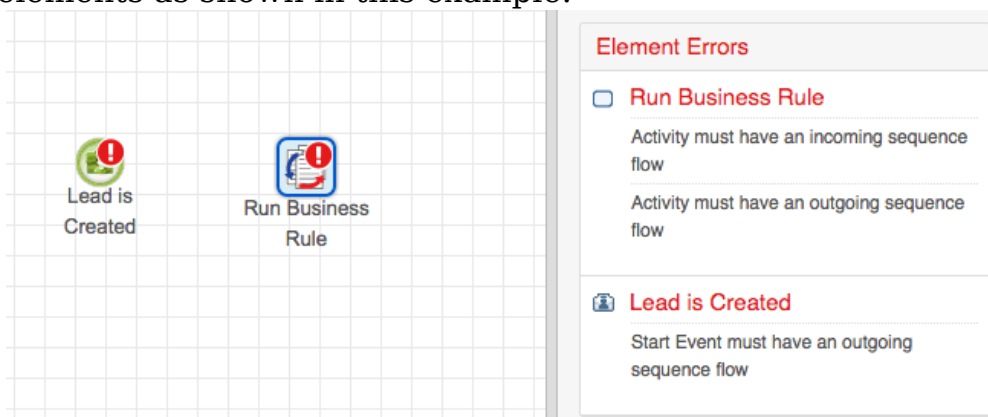
Resolving Errors in the Element Errors Panel

When using the Visual Designer to create a Process Definition, real-time configuration errors are displayed to the right of the design canvas in the Element Errors panel.



If an element on the canvas contains a flow error, the Visual Designer will place a red exclamation point icon over the element until the error is resolved. This error icon will always have a corresponding explanation in the Element Errors panel.

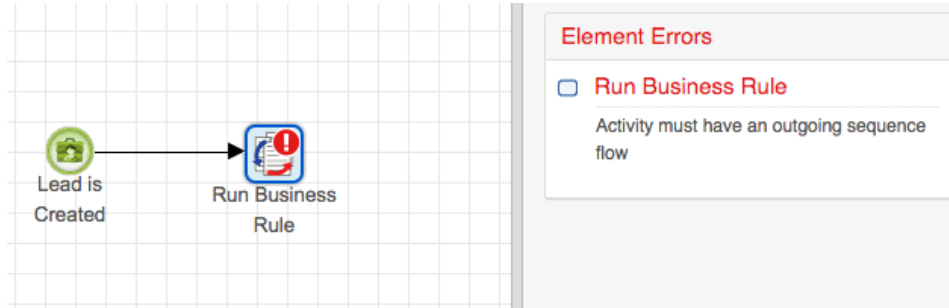
Some errors will occur and then resolve themselves naturally as the Process Definition is pieced together. For example, all elements will be considered in an error state until the appropriate connectors have been inserted in between elements as shown in this example:



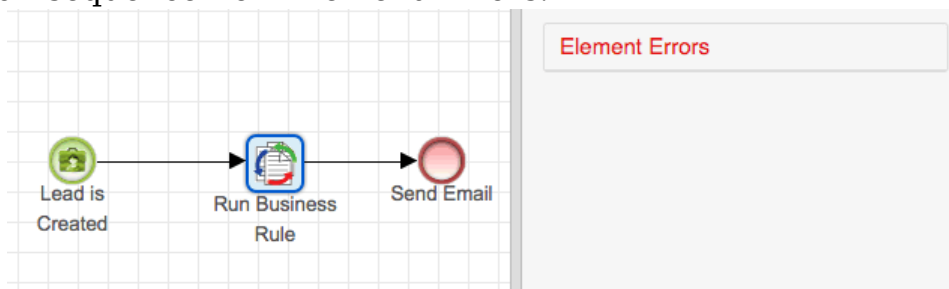
- Place and configure a Start event and an Intermediate event. The Element Errors panel will display three errors because:

1. A Start event must have a connector to some second element.
2. An Intermediate event must have a connector from an earlier element.
3. An Intermediate event must have a connector to a next step or element.

- Now add a [Sequence Flow Connector](#) from the Start event to the Intermediate event. This one connector resolves two of the three element errors because it serves as both an outgoing connector for the Start event and an incoming connector for the Intermediate event:



- Resolve the third and final Element Error by creating an End or Intermediate event after the "Run Business Rule" element and then place a connector between the two. Note that inserting a new Intermediate event or Gateway (instead of an End event) will result in a new error until its outgoing sequence flow is resolved. Placing an End event and its connector, though, will resolve all sequence flow Element Errors.



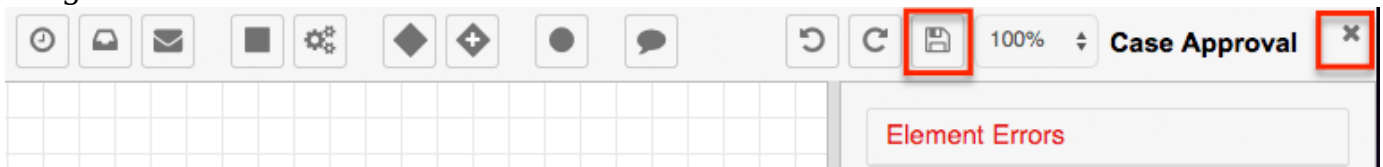
Some common Element Errors and resolutions include:

| Element Error | Resolution |
|--|---|
| Activity must have an incoming sequence flow. | Insert a sequence connector that flows from a Start or Intermediate element to the Event with the error. |
| Activity must have an outgoing sequence flow. | Insert a sequence connector that flows to an Intermediate or End element from the Event with the error. |
| Gateway must have two or more outgoing sequence flows. | Create at least two new Intermediate and/or End events after the Gateway. Connect the Gateway to these elements using a separate sequence connector for |

| | |
|---|---|
| | each element. |
| Script task must have a valid type different of [Unassigned]. | Right click on the Action element, which should have a large blue question mark over it. Select an item from the Action Type menu to remove the Unassigned designation. |

Exiting the Visual Designer

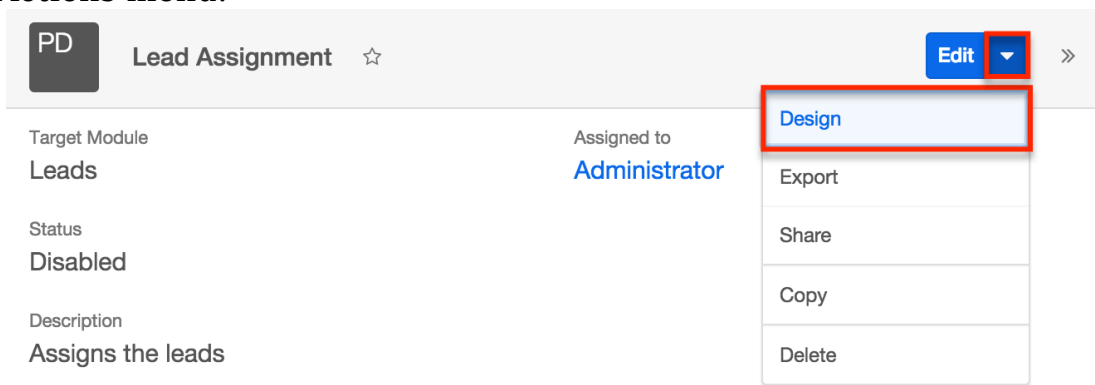
At any time during the design of the process definition, you can exit the visual designer by clicking the X at the top of the screen, just above the Element Errors panel. While the visual designer automatically saves your progress every 15 seconds, you should still be sure to press the save button before exiting the designer.



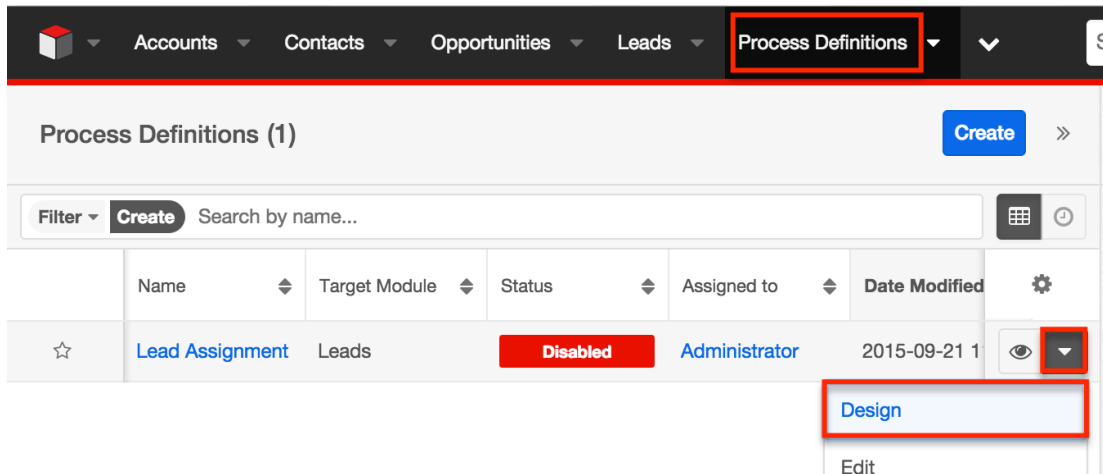
Returning to the Visual Designer

After exiting the visual design canvas, you can return to design view of a process definition from any of the following locations in Sugar:

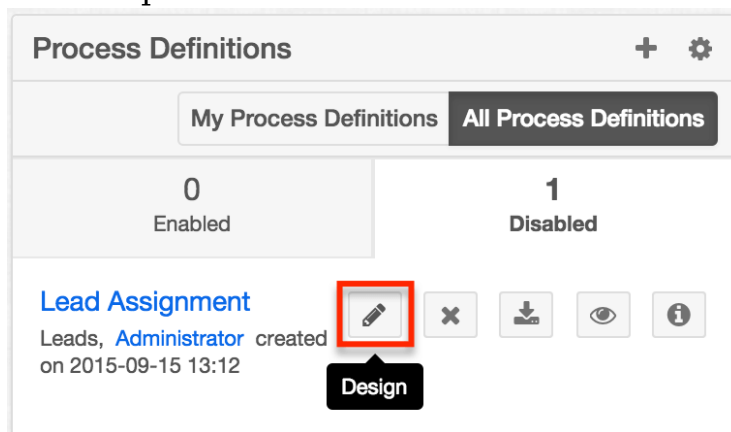
- From the process definition's record view, select "Design" from the record's Actions menu:



- From the Process Definitions module's list view, select "Design" from the record's Actions menu:



- From the Process Definitions dashlet, click on the Design icon adjacent to the relevant process definition:



Please note that it may take several seconds for the design canvas to load.

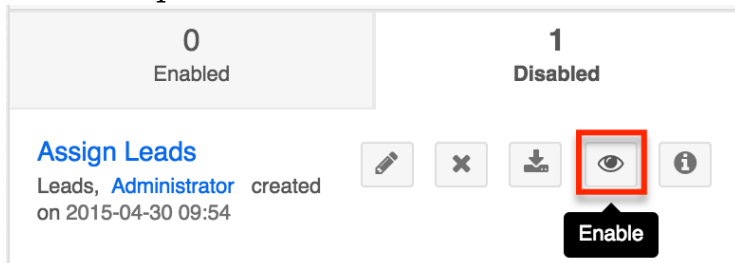
Enabling and Disabling Process Definitions

It is necessary to enable process definitions when their design is complete. It is also possible to disable process definitions when needed. The following sections explain how to enable or disable a process definition.

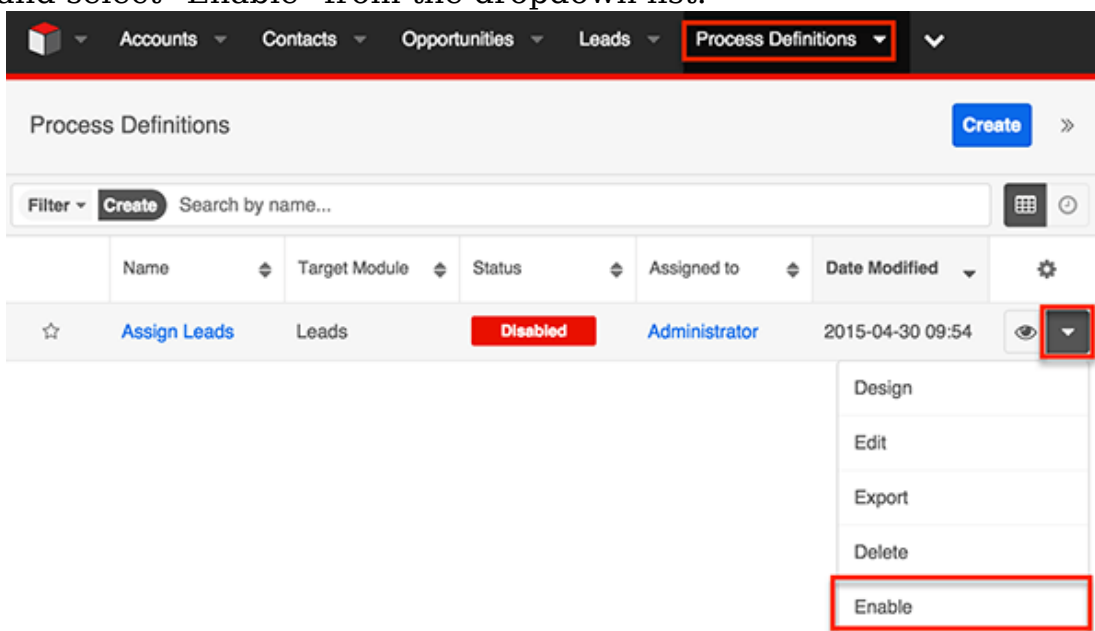
Enabling Process Definitions

New process definitions are set to "Disabled" by default. This is a preventative feature that ensures a process instance is not triggered inadvertently during the design phase. After the design is fully configured, exit the Visual Designer and set the process definition to "Enabled". There are two ways to enable a process definition:

- Enabling Via Dashlet : Visit your [Process Author dashboard](#). Disabled process definitions will be listed in the "Disabled" tab of the Process Definitions dashlet. Find the Enable/Disable icon adjacent to the relevant process definition. Click on the icon and processes will immediately begin running when the process definition's conditions are met.



- Enabling Via List View : Navigate to the Process Definitions' list view by clicking on the Process Definitions module tab. From list view, identify the process definition that you want to enable. Click on that row's actions menu and select "Enable" from the dropdown list.



The process definition's Status will change from red to green "Enabled". Processes will immediately begin running when the process definition's conditions are met.

| Name | Target Module | Status | Assigned to | Date Modified | |
|----------------|---------------|---------|---------------|------------------|------|
| ☆ Assign Leads | Leads | Enabled | Administrator | 2015-04-30 17:34 | 👁️ ▼ |

Disabling Process Definitions

Disabling a process definition will prevent it from triggering new processes. Any running processes related to the disabled process definition will pause in an In-Progress state until the process definition is re-enabled. To disable a process

definition, use either of the two techniques explained in the [Enabling Process Definitions](#) section, choosing "Disabled" instead of "Enabled".

Last Modified: 01/24/2017 04:32pm

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 webserver:

- `./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 webserver 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 affect 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 webserver 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 webserver 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.

Configuring a Slave Database

Sugar allows you to configure your instance to pull reports or list view data from a slave database instead of your live database. Reports and list views can create a heavy load on the database, so separating out the reports or list view data on a different database or server can help alleviate some performance issues.

To configure a slave database, set the appropriate array in the `config_override.php` file:

- Reports : `$sugar_config['db']['reports']`
- Dashlets, Subpanels, and List Views : `$sugar_config['db']['listviews']`

Set the following values in the array to configure Sugar to use a slave database:

| Key | Value |
|---------------------------|--|
| <code>db_host_name</code> | The host name of the server running the slave database |
| <code>db_user_name</code> | The user name to connect to the slave database |
| <code>db_password</code> | The password to connect to the slave database |
| <code>db_name</code> | The name of the slave database |
| <code>db_type</code> | The type of database running the slave (DB2, mysql, mssql, oracle) |

For example:

```
$sugar_config['db']['reports'] =  
    array(  
        'db_host_name' => 'sugar_slave',  
        'db_user_name' => 'ro_user',  
        'db_password' => 'ro_user_password',  
        'db_name' => 'sugarcrm_reports',  
        'db_type' => 'mysql',  
    );
```

Note: You must create the slave database and the synch mechanism to keep the slave up to date with the live database. The Sugar application will not synch data from the live database to the slave.

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';
```

Note: The `$sugar_config['save_query']` setting is not supported for Sidecar modules and only applies to Legacy modules.

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\\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.

Configuring Cron for Schedulers

Sugar's scheduler jobs are executed by the cron utility which runs on your server. There are several configuration options available to ensure that long-running or failed scheduler jobs do not impede your other scheduler jobs from running in a timely manner. First, `max_cron_runtime` determines how long a single job should be allowed to run. If a single job exceeds this limit, `cron.php` is aborted with the long-running job marked as in progress in the job queue. The next time cron runs, it will skip the job that overran the limit and start on the next job in the queue. Additionally, if the total running time of a single cron run across all current jobs exceeds `max_cron_runtime`, then cron will complete whatever job it is currently executing, then stop. The next time cron runs, it will pick up with the next queued job. The `max_cron_runtime` uses seconds as its units and defaults to 1800 (30 minutes). You may wish to adjust this number based on the typical time requirements of scheduler jobs in your instance. By default, `max_cron_runtime` is not enforced on your instance. In order to enforce this limit, set `enforce_runtime` to true.

```
$sugar_config['cron']['enforce_runtime'] = true; // default is false
$sugar_config['cron']['max_cron_runtime'] = 1800; // seconds, default
is 1800
```

The timeout configuration controls how long cron will wait before re-starting a job that previously failed to complete. Once a job has been marked as in progress for longer than the timeout setting, the next cron run will mark the job as failed, making it eligible in the queue to be executed by the following cron run. The timeout uses minutes as its units and defaults to 3600 (1 hour). You may wish to adjust this number based on how quickly you wish a failed or long-running job to be reattempted. Please note that should `enforce_runtime` be set to false or your `max_cron_runtime` be longer than the timeout, a job which is running normally may be set to failed upon reaching this timeout limit.

```
$sugar_config['jobs']['timeout'] = 3600; // seconds, default is 3600
```

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