Sugar Community Edition 6.5 Administration Guide

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Admin Wizard

Overview

The Admin Wizard displays when you log into Sugar for the first time after installation. This wizard guides you through the process of branding, localizing, and configuring email settings in Sugar that will be applicable to all users in your organization. You can skip this step if you prefer to do it at a later time.

Sugar users

A Sugar user can be a System Administrator, or a user with or without module-specific administration or developer privileges.

A System Administrator is a user who has access to all Sugar records and full control over administering and developing the application.

Module administration privileges allow users to have administrator access to records or to have control over the customization and administration of the modules. The System Administrator can grant this type of access to a user to allow the individual to manage a specific module. For more information, see Role Management.

When you log into Sugar as an administrator, the Admin link displays on the top right corner of your page. Click this link to view the Administration page. The Administration page displays sections that group tasks according to the area of administration.

Specifying system-wide settings

Follow the steps listed below to specify system-wide settings:

1.	Click Next on the Welcome to Sugar screen to view the Branding screen.

The Sugar logo, which is the default, displays as the current logo.

2.	Enter the following information:

Name. Enter the name that you want displayed in the title bar of your browser.
Select Logo. Specify the image file, in .png or .jpg format, containing your
organization's logo. Click Browse to navigate to the file's location and upload it.
The recommended size of the logo is 212x40 pixels.

3.	Click Next to view the System Locale Settings page.

4.	Specify the default settings for displaying data format, such as time, date, and currency. To change the default language in Sugar for all users in your organization, select the language pack from the Language drop-down list.

5.	Click Next to view the SMTP Server Specification page.

6.	Specify the email account to send emails to Sugar users regarding assignment notifications and new user passwords.

	To use Gmail, click Gmail, and enter the email address and password.

	To use Yahoo, click Yahoo, and enter the email address and password.

	To use Microsoft Exchange, click Exchange, and enter the server name and port number. To enter SMTP over SSL or TLS, select the appropriate option from the drop-down list. Optionally, to use SMPT authentication, enter the Exchange username and password.

	If you are not using any of the above, click Other, and enter the name of the SMTP server, and optionally, enter the

	appropriate username and password for SMPT authentication.

7.	To ensure that you can successfully send emails, click Send Test Email and check if the test email was received at the specified email address.

8.	Click Next.

To exit the screen and begin using Sugar, click Finish. This displays your Home page in Sugar.

9.	To configure your user preferences, click Continue. For information on configuring User Preferences, see Accessing Sugar and setting your User Preferences.

10.	To view options to perform other administrative functions such as creating users and teams, click the Admin link on the top right corner of your page to go to the Administration page.

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User Management

Overview

This section describes how to manage teams, users, and roles.

User Management

Use the User Management option to create, edit, activate, and deactivate users in Sugar. You can create a Regular User, a System Administrator, and a Group User.

A Regular user can access and use Sugar modules but does not have administrative privileges.

A System Administrator is a user who has administrative privileges in Sugar to perform tasks such as creating users. The System Administrator can access all modules and records. Role restrictions, discussed later in this chapter, do not apply to System Administrators.

A Group User is a bucket that is used for inbound emails, and does not count toward the number of Sugar licenses that you purchase for your organization. For example, creating a group mail account for Support creates a group user named Support to handle customer support issues. Users can distribute the emails to other users from the group inbox. You can create a group user from the Users Home page or when you create a group for incoming emails as described in Inbound Email.

The user name displays in the list on the Users Home page and the employees list on the Employees Home page after you create a Regular user or an Administrator. Group user names and Portal API user names display in the Users list but not in the employees list.

You can assign users to roles depending on the tasks they perform for the organization.

To create a regular user or an administrator user

1.	Click User Management in the Users panel of the Administration Home page.

This displays the Users Home page.

2.	Select Create New User from the Actions bar on the Users tab, and enter the following information under User Profile:

a.	In the User Profile section, enter the user's name, user type, and current status.

b.	In the Employee Information section, specify information such as the user's current status, title, department, phone numbers, IM (Instant Messenger) type, and home address. You can add additional comments in the Notes field.

c.	In the Email Settings section, you can set one or more email addresses for the user's mail accounts. You can further specify whether an email address is the user's primary email address or whether it will be used for an automated response to email. You can also specify an email client from the drop-down list, and specify the user's account information for the pre-configured email provider. For more information on setting up and configuring emails, see Configuring Email Settings.

3.	If the system-generated password feature is not enabled, you can create a password on the Password tab. You can manually send the password to the user along with the username. Alternatively, you can enable the system to generate a temporary password automatically and email it to the user. For more information on system-generated passwords, see Password Management. The user will need a username and password to log into Sugar and change the password on the User Preferences page.

4.	On the Advanced tab, you can specify default system settings, such as locale settings, as described in Editing your User Preferences.

5.	On the Access tab in the Detail View, you can add or remove a role to change the user's access permissions for a Sugar module, and to perform specific actions, such as editing and deleting records within the module. You can enable or disable access to any Sugar module and to any action within a module. By default, the user has permissions to access any module and perform any action.

Scroll down the Access page, and in the Roles section, click Select to assign the user a role from the Roles list. For information on creating roles, see Role Management.

| 6. | To create the user, click Save. |

Sugar creates the User record, and a corresponding Employee record. You can now assign the user to roles and teams.

To assign roles to a user

| 1. | Select the user from the Users list. |

This displays the user's Detail View page.

| 2. | To assign a role to the user, scroll down the page, click Select in the Roles section and select one or more roles that you want to assign to the user. |

The user is assigned to the role, which is now listed in the Roles sub-panel.

To manage user information

| • | To update the status of some or all users, select multiple records in the Users List View, and click Mass Update in the Actions drop-down list. For more information, see Editing and Deleting Multiple Records . |

| • | To view a user's details, click the name in the Users list. |

| • | To edit user details, click Edit on the user's Detail View page, change the information as needed, and click Save. |

| • | To duplicate the user details, click Duplicate on the user's Detail View page, edit the information as necessary, and click Save. The following field values cannot be duplicated: Publishkey |

•	To import user data, click Import Users

•	To reset to the default values for User preferences, Homepage, or Dashboard, click the appropriate button in the Detail View.

To delete a user

1.	Click the user's record in the List View.

This displays the user's Detail View page.

2.	Click Delete.

Sugar displays a message alerting you that corresponding employee record will also be deleted.

To create a Group User

1.	Select Create Group User from the Actions drop-down list on the Users tab.

2.	Enter a username for the Group User in the User Name field. For example, you can enter Support Queue for the Support team.

3.	In the Status field, select Active to indicate the Group User is being used; or else, select Inactive.

4.	In the Email Settings section, set one or more email addresses for the user's mail accounts. You can further specify whether an email address is the primary email address or whether it will be used for an automated response to emails.

5.	Click Save to create the user; click Cancel to exit the page without creating

	the user.

Role Management

Roles control user actions on records, teams control record data access. A role defines a set of permissions to perform actions such as viewing, editing, and deleting information. You can control user actions by using roles to restrict access to modulesand module fields, and to limit the actions that a user can perform in Sugar.
System Administrators cannot be restricted with roles, and they can access any module and perform any action.
Users are affected by a role only if they are assigned to it. That is, users who are not assigned a role can, by default, access and take any action in any module. Users can have multiple roles assigned to them, and a role can be assigned to multiple users.
Some examples are:

•	You can assign engineers in your organization to a role that prevents access to the Opportunities module.

•	You can assign junior sales representatives to a role that allows them to edit opportunities, accounts, and contacts, but not delete them.

Creating Roles

When you create a role, you specify whether access is permitted or not, the modules that the role can access, the access type such as Normal (for Regular users) or administrator, and the actions that they can perform.

When a user is assigned multiple roles, the more restrictive settings prevail.For example, if a user is assigned to two roles pertaining to a module where one role grants administrator access and the other grants Regular User access, then the user has only Regular User access because it is more restrictive.

Not Set:

A special case is the Not Set value in a role definition. You can use this setting to ensure that a role does not affect a particular setting. This allows simple roles to be constructed and then combined to achieve the desired security level.

For example, if users are assigned to both the following roles:

Role A, where Access Type = Admin and Export (action) = None

Role B, where Access Type = Normal and Export (action) = All

Then, users can see records that are assigned to the team to which they belong, but they cannot export the data.

If you change the Access Type to Not Set:

Role A, where Access Type = Admin and Export (action) = All

Role B, where Access Type = Not Set and Export (action) = None

Then the user can see all records in the module, but cannot export the data.

When new roles are created, the default value of Access, User Type, and Operations is Not Set. The default value of Not Set applies a permission to each role option as follows:

Access: Not Set = Enabled

User Type: Not Set = Normal

Action (Delete, Edit, etc): Not Set = All

When you create a role, you specify the following permissions for each Sugar module:

Access: This setting specifies which modules the role is permitted to access. Options are as follows:

	Not Set: Ensures that the role does not affect a particular setting. This is the default setting for new roles.

	Enabled: Permits the user to view the module.

	Disabled: Hides the module from the user's view.

Actions: This setting lists the following actions:

•	Delete: Grants permission to delete records in the module. If None is selected, the Delete button is disabled on the Detail View page.

•	Edit: Grants permission to edit records in the module. If None is selected, the Edit button is disabled on the Detail View page. Additionally, the user cannot use the Mass Update panel to update records for the module.

•	Export: Grants permission to export record data in the module. The Export link located at the top of List View page is removed when this privilege is not available to the user.

•	Import: Grants permission to import record data in the module. The Import link in the navigation bar does not appear when this privilege is not available.

•	List: Grants permission to access the List View pages in the module.

•	View: Grants permission to view records in the module.

You can specify who can perform each of the above actions. Options are as follows:

	All: All users who are assigned to the role can perform the action

	Owner: The person who created the record can perform the action

	None: Nobody can perform the action

	Not Set: Ensures that the role does not affect a particular setting

To create a role

1.	Click the Role Management link in the Users section of the Administration page.

This displays the Roles List View page.

2.	Click the Create Roles List View page.

This displays the Roles >> Create page.

3.	Enter a name and description for the role.

4.	Click Save.

This displays the Detail View page of the role with a list of available modules along with the action type.

5.	To specify access to a module, double-click the Access field corresponding to that module, and select the desired option from the drop-down list.

6.	To specify who can perform a specific action, double-click the action field and select the desired option from the drop-down list.

7.	Click Save.

To assign users to a role

1.	Scroll down to the Users sub-panel in the role's Detail View page and click Select.

2.	Select users from the Users list.

The system assigns the selected users to the role and displays the username in the Users sub-panel of the Roles page. Alternatively, you can also assign users to a role in the User Preferences sub-panel of the User Management page. Role restrictions do not apply to Admin users.

3.	Click Save.

To manage roles

•	To view the role details, click the role name on the Roles List Viewpage.

•	To edit the name of the role and its description, on the Detail View page, click Edit, revise the information, and click Save.

•	To edit the access rights of a role (for example Mass Update) per module, follow the steps listed below:

a.	Go to the Role's Detail View page.

The Role's Detail View page displays its access control information, per module.

b.	Double-click on a cell.

c.	Select a value from the drop-down list in the cell.

d.	Click Save.

•	To duplicate the access control information, on the Detail View page, click Duplicate, enter a new name for the role, and then click Save. Note that the users list associated with the role is not duplicated.

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

•	To remove a user, click the Remove (rem) icon corresponding to the user name in the Users sub-panel.

To view roles for a user
Follow the steps listed below to view access permissions for a specific user:

1.	Click List Roles by User on the Actions bar on the Roles tab.

| 2. | Select the user from the drop-down list. |

This displays the details of the user's privileges for each module. The restrictions are then merged and the more restrictive settings across all roles are assigned to the user. You cannot change any of the privileges because they are associated with the role.

Password Management

As a System Administrator, you can use the Password Management section to create and manage passwords that apply to all users in your organization.

You can enable the System-Generated Password option to generate and send temporary passwords automatically to new users when you create a record for them. Users can log into Sugar with this password and create a new password for themselves on the User Preferences page. If you do not enable this option, you will need to create the password manually and provide it to the user.

You can create and manage templates to send system-generated passwords and links to reset passwords. Sugar provides default email templates to send system-generated passwords and links to reset user-generated passwords. You can view these two templates when you select Email Templates from the EmailsActions

Sugar also provides an option to display the Forgot Password link in the Sugar Login window. Users who forget their passwords can click this link to submit their request for a new password. When Sugar receives such a request, it automatically sends a link to a page where the user can create a new password.

For security purposes, you can set an expiration date for system-generated passwords.

Enabling Authentication in Sugar

LDAP Authentication

You can enable authentication in Sugar if your organization has implemented Lightweight Directory Access Protocol (LDAP) or Active Directory authentication. When users in your system attempt to log into Sugar, the application authenticates them against your LDAP directory or Active Directory. If authentication is successful, the user is allowed to log into Sugar. You need to specify the encryption key for the system and forward it to your users if you are using LDAP with SOAP.

SAML Authentication

If your organization has implemented Security Assertion Markup Language (SAML) for single sign-on, you can enable it in Sugar.

Note:	Settings for Sugar password requirements, password reset, and password expiration are not applicable when LDAP authentication or SAML authentication is enabled.

To specify and manage password settings

1.	Click Password Management in the Users sub-panel of the Administration Home page.

This displays the Password Management page.

2.	You can specify the following information:

System-generated passwords

You can enable Sugar to email a system-generated link to users who need to reset their passwords in this section. Ensure that you have configured an email server for outbound emails on the Email Settings page, and that you have valid email addresses for all your users.

For security reasons, you can set an expiration date for system-generated passwords. You can specify a time period or the number of logins after which the password expires. To specify a time period, select Password Expires in and enter the time period in days, weeks, or months. To specify the number of logins, select Password Expires upon and enter the number of logins.

User Reset Password

You can configure settings to enable users to reset their passwords using the Forgot Password link that displays in the Login Window in this section. By default this link is disabled for LDAP authentication purposes.

Enable Forgot Password Feature. This option, which is enabled by default, enables users who forgot their passwords to use the Forgot Password link on the Login window to submit their user name and email address to Sugar. The system

automatically sends them an email with a link to the page where they can reset their password.

Generated Link Expiration. Use this option to specify whether the Forgot Password link expires or not. Select None if you do not want the link to expire. Or else, select Link Expires inand enter the time period in minutes, hours, or days, when the link remains active.

Enable reCAPTCHA Validation. You can select this option only when the Enable Forgot Password feature option is enabled. When you enable reCAPTCHA validation, the Public key and Private key fields display below. Enter the Public key and the Private key that you received from reCAPTCHA for your Sugar instance in the appropriate fields.

Email Templates

In this section, you can create message templates to use when sending out generated passwords and links to reset passwords.

Email template containing system-generated password. To create an email template for system-generated passwords, select System-generated password email from the drop-down list and click Create.

Email template containing system-generated link to reset password. To create an email template to send a link to users who forgot their passwords, select Forgot Passwordemail from the drop-down list, and click Create.

Sugar creates the template and displays it in the Email Templates Home page. On the Emails tab, select Email Templates from the Actions bar to view available email templates.

Note:	If you choose to create your own templates to send passwords, copy the password variable provided in the default template, named System-generated password email, into your email template. The password variable is not available in the Insert Variable drop-down list of the Email Template form.

LDAP Support

You can enable LDAP authentication in this section.If you are using LDAP authentication, you must disable the Forgot Password option.

To enable LDAP authentication, select the Enable LDAP box, and enter the following information in the fields below:

Server. Enter the LDAP server name.

Port Number. Enterthe server's port number.

User DN. Enter the user DN name; for example, ou=people, dc=example, dc=com.

User Filter. Enter any additional parameters to apply when authenticating users. For example, is_user_id=1.

Bind Attribute. Enter the attribute name that is used to bind the user's name in LDAP. For example, in openLDAP, the attribute name is userPrincipleName.

Login Attribute. Enter the attribute name that is used to search for the user in LDAP. For example, in openLDAP, the attribute name is dn.

Group Membership. Select this checkbox if you wish to specify that the user is a member of a specific group, and enter the following information:

Group DN. Enter the group DN name; for example, ou=groups, dc=example, dc=com.

Group Name. Enter thegroup name; for example, cn=sugarcrm.

User Attribute. A unique identifier used to check if the user is a member of the group. For example, uid.

Group Attribute. The attribute of the group that will be used to filter against the User Attribute. For example, MemberUid.

Authentication. Select this checkbox to use specific user credentials to bind to the LDAP server, and enter the user name and password in the fields that display below.

Auto Create Users. Select this checkbox to create the user name in the Sugar database if it does not already exist.

Encryption Key. If you are using LDAP with SOAP, enter the encryption key to encrypt user passwords in the Sugar Plug-in for Microsoft Outlook. The php_mcrypt extension must be enabled in the php.ini file.

SAML Authentication.

Use this section to enable SAML authentication. You must disable the Forgot Password option if you are using SAML authentication.

Select the Enable SAML Authentication checkbox and enter the following information:

Login URL: Enter the SAML URL for authentication. This is the path to the SAML server you are authenticating to.

X509 Certificate: Enter the SAML X.509 certificate public key.

5.	Click Save.

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Sugar Connect

Overview

Connect to the various SugarCRM services where you can access the SugarCRM forums and Sugar Wiki, search FAQs (Frequently Asked Questions), download the latest Sugar version, file and research reported bugs, request new features and more.

Sugar Support Portal

Use this option to access the SugarCRM forums, search FAQs (Frequently Asked Questions), download the latest Sugar version, buy network subscription, log into the network, file bugs, research reported bugs, and request new features.

The SugarCRM forums cover discussions on a broad range of topics such as setting up the Sugar application and Frequently Asked Questions (FAQs) . You need to register your organization with SugarCRM to participate in the discussions. You can view postings on any of the Sugar forums without registering your organization.

Sugar Updates

Use this option to check automatically or manually for Sugar updates.By default, the option to check for updates automatically is enabled.

If you choose to check for Sugar updates automatically, you will be notified when new Sugar versions or updates are available. To perform a manual check, uncheck the Automatically Check for Updates option and click Check Now. If you already have the latest version, You have the latest version available message displays at the bottom of the panel.

Online documentation

Use this option to view and download PDF copies of available documentation on installing and using the Sugar application and plug-ins.

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System

Overview

This section includes options to configure system-wide settings that apply to all users in your organization.

System Settings

Use this option to configure the system-wide settings according to your organization's specifications. Users can override some default settings, such as the datetime format, on their User Preferences page

User Interface

Use this section to configure the user interface.

To configure the user interface

1.	Configure the following fields:

- Listview items per page. Enter the maximum number of records you want displayed in the list view. The system paginates lists that contain more than

the specified number of records.

- Prevent user customizable Homepage layout. Select this box if you want to prevent users from moving Sugar Dashlets on the Home page. However, users can still create additional Sugar Dashlets.
- Maximum number of Sugar Dashlets on Homepage . Enter the maximumnumber of Sugar Dashlets you want displayed on the Home page. Users will not be able to add more than the number of Sugar Dashlets that you specify. The default value is 15.
- Display server response times. This option is enabled by default. The footer on every page displays the time taken to respond when users attempt to perform an action, such as logging in or opening an item, in Sugar. Deselect this option if you do not want to display the response time.
- System Name. This field displays your system name.
- Current Logo. This field displays your organization's logo that currently displays in the User Interface.
- Select Logo. Enter the path to the location of the logo that you want to upload from your local machine. Or, click Browse to navigate to the location of the logo on your local machine. The dimension should be 212 X 40, with the standard transparent background color, in PNG or JPG format.
- Lead Conversion Options. Use this option to enable users to copy, move or do nothing with the activities related to the converted leads.
- Subpanel items per page. Enter the maximum number of records you want displayed in the List View. The system paginates lists that contain more than the specified number of records.
- Prevent user customizable subpanel layout. Select this box if you want to prevent users from dragging and dropping sub-panels to a different location in their Detail View layout.
- Show Full Names. Select this box if you want the full name for users displayed instead of their login names.
- Display module icon as favicon. Select this option if you want to display the module icon in the browser's navigation tab instead of the Sugar icon, which is the default. For example, when you are in the Accounts module, the navigation tab will display the Accounts icon.
- Configure AJAX User Interface.The AJAX UI enables navigation through most of the Sugar application without requiring full page refreshes. This results in improved performance with reduced page rendering times. However, the AJAX UI cannot be applied to the following:

	Some older third party modules
	Some core modules with complex customizations

When users try to access the above modules in an AJAX UI, an error message displays, warning them of the issue with the module.

Use the Configure AJAX User Interface link to disable the AJAX UI for specific modules. The AJAX user interface has been disabled for the following modules by default:

	Emails

	Reports

	Users

Note:	The Admin UI is not AJAX UI-enabled so that admin users can access the Admin panel and disable the AJAX UI systemwide.

2.	To save the settings, click Save.

3.	To restore the default settings, click Restore; to exit the page without saving your changes, click Cancel.

Proxy Settings

If you are using a proxy server to connect to the web, you will need to enter the information here to allow the system to check for Sugar updates.

1.	Configure the following fields:

- Use proxy server. If you want to connect to the web through a proxy server, select this option.
- The system displays fields to specify the proxy host and port number.
- Proxy Host. Enter the name of the proxy server host
- Port. Enter the port number for the proxy host.
- Authentication. Select this box if you want to enable proxy authentication to allow Sugar to connect to the company's proxy server.
- User Name. Enter the user name.
- Password. Enter a password for the user.

2.	To save the settings, click Save; to restore the previous settings, click

	Restore; to exit the System Settings page without saving your changes, click

SkypeOut

Select this option to allow users to click a phone number field to make calls through Skype.

To enable Skype

1.	Select the Enable SkypeOut integration box.

2.	To save the setting, click Save; to restore the previous setting, click Restore; to exit the System Settings page without saving your changes, click

Advanced

1.	Select any of the following advanced configuration options:

Validate user IP address: For security reasons, by default, this option is enabled to validate the IP addresses of users who log into Sugar.

Note:	Some high availability systems may change IP addresses for load balancing purposes. If the IP address changes during a user session, the user will be logged out, and will have to log back into Sugar.

Log slow queries. Select this option to log the system's slow responses to user queries in the sugarcrm.log file. This information is for performance tuning investigation.
Maximum upload size. Enter the maximum file size, in bytes, that users are allowed to upload.

Note:	The upload size is also dependent on PHP's upload settings.

- Log memory usage. Select this option to record memory usage in the sugarcrm.log file.

- Slow query time threshold. Specify a threshold, in milliseconds, to define slow queries. Queries that take longer than the threshold time are logged in the sugarcrm.log file. This information is for performance-tuning investigation.
- Display stack trace of errors. When you select this option, if an error occurs when users are running the application, the system displays where the error occurred in the application's stack trace. This information is for debugging purposes.
- Developer Mode. Select this option to disable caching so that you can immediately view changes made to language, vardefs, and template files.
- vCal Updates Time Period. Select this option to specify the number of months in advance of the current date that Free/Busy information for calls and meetings is published. The minimum value is one month, and the maximum value is 12 months. To turn off Free/Busy publishing, enter 0.

| 2. | To save the settings, click Save. |

| 3. | To restore the previous settings, click Restore; to exit the System Settings page without saving your changes, click |

Logger Settings

The Sugar Logger logs events that occur in the Sugar application. By default, the logs are written to sugarcrm.log in the Sugar root directory. Hence, if a problem arises, you can refer to the log file for information that may help in troubleshooting it.

When you upgrade Sugar, the application parses your Logger settings automatically from the log4.php properties file of your previous Sugar version, and populates the Logger Settings sub-panel with the information.

You can, however, change the settings if necessary.

The logging levels are as follows:

| • | debug: Logs events that help in debugging the application. |

| • | info: Logs informational messages. |

| • | warn: Logs potentially harmful events. |

•	error: Logs error events in the application.

•	fatal: Logs severe error events that leads the application to abort. This is the default level.

•	security. Logs events that may compromise the security of the application.

•	off. The logger will not log any events.

When you specify a logging level, the system will create log files for the specified level as well as higher levels. For example, if you specify 'Error', the system creates log files for 'error', 'fatal', and 'security'.

The default size of a log file is 10 MB. Downloading large log files from the web server can be a slow process. Hence, if you view log files frequently, it is recommended that you view actions that occurred since the last entry in the current log file.

To configure logger settings

1.	In the Logger Settings panel, enter the following information:

- Log File Name. Specify a name for the log file.
- Extension. Enter the file extension. The default is.log.
- Append After File Name. From the drop-down list, select a time period to append to the file name. This makes it easier to identify the log that you want to view.
- Maximum Log Size. Specify the maximum size of the log file in MegaBytes(MB). The default is 10MB.
- Log Level. From the drop-down list, select the event level that you want to capture in the log file. The default is fatal.
- Default Date Format. Enter the default date format for the log file. This format must be supported by strftime. The default is %c.
- Maximum Number of Logs. Specify the maximum number of log files to save. When the number of log files exceed this limit, Sugar deletes the log file that was created first. The default is 10 logs.
- Configure Log Settings. Click this link to view the Sugar log file, as described in To configure log settings.

2.	To save the settings, click Save.

3.	To restore the previous settings, click Restore; to exit the System Settings page without saving your changes, click

To configure log settings

1.	In the Logger Settings panel, click the Configure Log Settings link.

2.	Select one of the following:

	All. Select this option to view the entire log for the current session.

	Next. Select this option to view only new entries in the log file.

	Mark Point. Select this option to indicate that you want to view actions that were logged after the last entry in the current log file. Then click Refresh From Mark to view actions that occurred since the time you clicked Mark Point.

For example, to debug a problem, select the debug logging level on the Logger Settings page, click Configure Log Settings, and then click All to view all user actions in the log file. To view only new user actions since the time you clicked All, click Next. This action will display only new entries in the log file. To view new user actions since the last entry in the current log file, select Mark Point and then click Refresh from Mark. This action will append new entries to the current entries in the log file.

3.	To search the log by keyword, enter it in the Search box. To search for entries using a regular expression, enter it in the Search box, and select the Reg Exp box. Press Enteron your keyboard to begin the search.

Note:	The Ignore Self option is not used.

Sugar displays the log entries on the screen.

Import Wizard

Use this link to easily import data into the system for selected modules without having to visit each individual module. The process of importing the data is identical to the user data import.

Follow the steps listed below to import data using the Admin Import Wizard:

1.	Click the Import Wizard link.

2.	This displays the Step 1: Select Data Source page.

3.	Select the module you want to import data into, from the drop-down list.

4.	Click Next.

5.	Follow the instructions provided in the Import Wizard to complete the process.

Locale

Use this option to set system-wide default formats for date, time, language, name, and currency. If you are using MySQL, you can also specify the collation order for records in the application.

- User Interface: Use this section to set the default values in the Sugar User Interface.
- Default Date Format. Select a date format for all records from this drop-down list. Users can override the default format by setting a different date format in their User Preferences page.
- Default Time Format. Select a time format from this drop-down list to display in all records such as Cases. Users can override the default format by setting a different time format in their User Preferences page.
- Default Language. Select the default language for the Sugar User Interface from this drop-down list.
- Default Name Format. Enter the default salutation and name format to display in list views and detail views. You can specify any combination of salutation first name, and last name. For example: Mr. John Smith, Mr. Smith,

or John Smith.Users can override the default format by setting a different time format in their User Preferences page.

- Default Currency. Use this section to override the default currency that you set during installation. On the User Preferences page, users can override the default currency that you specify in this panel.
- Currency. Enter the name of the currency that your organization uses to conduct business.
- Currency symbol. Enter the symbol for the currency.
- ISO 4217 Currency Code. Enter the ISO code for the currency.
- 1000s Separator. Specify a delimiter to separate thousands when users specify a numeric value for the amount.
- Decimal Symbol. Specify a default decimal symbol.
- Export Settings
- Use this panel to specify export settings such as the delimiter used to separate data in export files, and the default character set used to export data from Sugar. The settings you specify here apply to all users in the organization. However, users can define a different default export character set on their User Preferences page to export data from Sugar.
- This character encoding is also used when importing data into Sugar.
- By default, Sugar uses UTF-8 to store and export data. For locales that use character encoding other than UTF-8, you must specify the appropriate default character set. This ensures that the character set Sugar uses to create the exported file is mapped to the correct character set on the user's machine. For example, MS Windows uses SJIS in Japan. So, for users in this locale, you will need to select SJIS as the default export character set.
- By default, both users and administrators can export files from Sugar. However, you can prevent users from exporting files.
- Export Delimiter. Specify the delimiter, such as a comma or a period, to use while exporting data.
- Default Character Set for Import and Export. The default is UTF-8. For locales other than US and Western Europe, select the appropriate character set from the drop-down list.
- Disable export. Select this option if you want to prevent end users and users with administrative privileges from exporting data.
- Admin export only. Select this option to allow only users with administrative privileges to export data.
- Database Collation
- Sugar displays this sub-panel only if you are using the MYSQL database. This setting manages the connection layer between SugarCRM and your MySQL database, and should be set to match the collation of your database tables. You can select the desired collation order from the drop-down list. The default is utf8_general_ci. Changing this setting will not alter your existing tables, and all new tables created after this change will inherit the collation setting name.

CAUTION:	The database will return errors if you run queries against multiple tables, and if tables in the query have a different collation.

To save the settings, click Save; to exit the page without saving your changes, click Cancel.

Backups

Use this option to backup the Sugar configuration files. Note that this option does not backup the database.

To backup Sugar configuration files

1.	Click the Backups option in the System sub-panel on the Admin page.

2.	In the Directory field, specify a directory that is writable by the same user as the Apache process.

3.	In the Filename field, enter a file name for the zip file including the .zip extension.

4.	To ensure that backup can be performed, click Confirm Settings.

5.	Click Run Backup to create the .zip file of your Sugar application files.

Note:	To backup your database information, refer to your database vendor's documentation.

Currencies

Use this option to define a new currency and rate.

For each new currency that you define, enter the name, symbol (for example, $), conversion rate to the US $, the currency code (such as CDN for the Canadian

dollar). Set the Status to Inactive if you do not want users to use this currency for transactions.

Note: Install Adobe Flash 8 to display the Euro symbol in Charts.

Repair

Use this option to upgrade and rebuild data from a previous version of Sugar for the current version of the program.You also use this option to convert a Sugar installation to offline mode.

The options are listed below.

- Quick Repair and Rebuild: Repairs and rebuilds the database, extensions, vardefs, Sugar Dashlets, and so on for selected modules. Click this option, select the modules you want to repair, and click Repair. You also use this option to clear any custom My Activity Stream link types from the cache.
- Expand Column Width. Expands certain char, varchar, and text columns in MSSQL database.
- Rebuild .htaccess file: Rebuilds the .htaccess file to limit access to certain files directly.
- Rebuild Config File: Rebuilds the config.php file by updating the version and adding defaults when not explicitly declared. Click this option to check the file and, if necessary, clickRebuild.
- Rebuild Extensions: Rebuilds extensions including extended vardefs, language packs, menus, and administration
- Rebuild Relationships: Rebuilds relationship metadata and drops the cache file.
- Rebuild Schedulers: Rebuilds your default Scheduler Jobs. Click this option and then click Rebuild.
- Rebuild Sugar Dashlets:Rebuilds the cache file for Sugar Dashlets.
- Rebuild Javascript Languages: Rebuilds Javascript versions of language files.
- Rebuild JS Compressed Files: Copies original Full JS Source files and replaces existing compressed JS files.
- Rebuild JS Grouping Files: Re-concatenates and overwrites existing group files with latest versions of group files.
- Rebuild Minified JS Files: Copies original Full JS Source Files and minifies them, then replaces existing compressed files.
- Repair JS Files: Compresses Existing JS files - includes any changes made, but does not overwrite original JS Source files.
- Repair Non-Lowercased Fields: Repairs mixed-case custom tables and metadata files to fix issues where code expects lowercase field names.
- Repair Roles:Repairs roles by adding all new modules that support access control aswell as any new access controls to existing modules.

- Repair Inbound Email Accounts: Repairs Inbound Email accounts and encrypts account passwords.
- Remove XSS: Removes XSS Vulnerabilities from the database. Click this option, select a module, and click Execute. If any XSS strings are found, the system lists them in the Object(s) found field below.
- Repair Database: This option is applicable to MYSQL databases only. It repairs your Sugar database based on values defined in the vardefs. You can choose to display the SQL that will be executed on the screen, export it, or execute it.
- Repair Activities: Repairs Activities (Calls, Meetings) end dates.
- Enable/Disable Seed Users: Enables or disables seed users populated during demo installation. Click this option, and if the seed users are enabled, click Deactivate to disable them. If the seed users are disabled, click Activate to enable them.

Scheduler

Use the Scheduler to ensure timely execution of custom processes such as workflows and email campaigns. You can schedule jobs such as monitoring inbound emails, executing workflows, running reports, and dispatching campaign emails.

The Scheduler integrates with external UNIX systems and Windows systems to run jobs that are scheduled through those systems.

The default scheduler jobs are as follows:

- Prune Tracker Tables. This job removes entries from the tracker and tracker_sessions database tables after 30 days.
- Check Inbound Mailboxes. This job monitors inbound emails in active mail accounts that you set up using the Inbound Email option in the Email panel of the Admin page.
- Run Nightly Process Bounced Campaign Emails. This job polls any mail account in which, the Possible Actions parameter is set to Bounce Handling. This is an essential component of monitoring mass email campaigns.
- Run Nightly Mass Email Campaigns. This job processes the outbound email queue for your organization's mass campaign emails.
- Prune Database on 1st of Month. This job reads all the tables in your Sugar database, finds records that have been soft-deleted (deleted = 1), creates a large SQL file, and physically deletes those records on the 1st of every month. It is mostly a performance job, and is not essential to the use of Sugar. The backup files are placed in cache/backups with time-stamped filenames.
- Removal of Documents From Filesystem. For records which contain a file such as the Documents or Notes module, the files are stored in the instance's

uploads directory on the filesystem. If the record is deleted by a user from Sugar, the Prune Databases on 1st of Month Scheduler will remove the deleted records from the database. Then when the Removal of Documents From Filesystem scheduler runs, it will remove any files which were associated with deleted records.

Configuring Settings for Scheduler Jobs

For Microsoft Windows, you can use the Task Scheduler. For UNIX and Linux systems, you will need to add a new cron job to the crontab.
To add a new cron job to your crontab for Unix and Linux Systems:

1.	At the command prompt, type crontab -e

2.	Add the following line to your crontab using the full path to the PHP directory in your Sugar installation:

* * * * * cd /path/to/sugar; /path/to/php -c/path/to/php.ini -f cron.php /dev/null 2>&1
where:
path/to/sugar is the path to where your Sugar installation resides.
path/to/php is the path to the PHP installation that you want to use.
path/to/php.ini is the path to the PHP configuration file that you want to use.

3.	Save your changes and close.

If you encounter problems, do the following:

1.	Determine the user ID that Apache server uses to run.

In a properly configured virtual host environment provided by your host, Apache will run as your Login User ID for files in your virtual directory. If you are unsure, contact the Customer Service department for your host.

a.	Search for a file named httpd.conf. Typically, this file is located in the /etc folder. It will vary with the distribution.

b.	Open the file using a text editor and locate the line that starts with "User". The name that follows it directly is the name of the user that Apache will run as on your system.

2.	Determine the capabilities of your PHP installation.

The Sugar Scheduler is designed to work with PHP and its extensions; specifically, the database Connector, the IMAP libraries, and the cURL libraries.

Ensure that the PHP binary (php-cli or just php) is available and has those libraries available.

Search for the PHP binary as follows:

a.	Type which php. On most correctly configured PHP installations, you will find the binary in /usr/bin or /usr/local/bin. If so, move on to Step number 3.

Or

b.	Type find / -name php. Typically, this command will return a long list. Parse through the list to find an executable file named php.

c.	If you cannot find the PHP binary, scroll down to the Troubleshooting Tips at the end of this section and read item number 2.

3.	Create a cron job for the Apache user

a.	Type crontab -e -u [the Apache user].

b.	Enter the following line to your crontab:

* * * * * cd /path/to/sugar; php -f cron.php > /dev/null 2>&

c.	To fine-tune this job, change the first two *s. The first is the Minutes value, the second is the Hours value.

For example, to run the cron job every three minutes, enter:
"*/3 * * * * cd /path/to/sugar; php -f cron.php> /dev/null 2>&1

4.	Test the crontab line as follows to confirm that your system is ready to run:

a.	At a terminal prompt, copy and paste the command for your cron job, and run it; the logic here is that if the command will execute successfully when run manually, the crontab will be able to execute successfully as well.

b.	If your cron job looks as follows:

* * * * * cd /var/www/html/sugarcrm; path/to/php -f cron.php > /dev/null 2>&1
Enter the command from "cd.." to "2&>1" into a terminal and press Enter.

c.	If any errors occur, refer to Troubleshooting Tips.

5.	Save your changes and close.

To add a new cron job to your crontab for Microsoft Windows (2000, XP, Server)
Set up the Windows batch file as follows:

1.	Create a batch file that will execute all the necessary commands.

2.	Enter the following paths in the batch file:

	cd c:\\path\\to\\Sugarinstance

where SugarInstance is your Sugar installation.
This folder should contain the cron.php file.

	c:\\path\\to\\php.exe -c c:\\windows\\php.ini -f cron.php

3.	Run the batch file from a command prompt to ensure that the output has no errors.

4.	If you encounter problems, do the following:

a.	Determine the PHP binary to use for PHP 5.2.x.

For the 5.2x version of PHP, the PHP-CGI binary is named php-cgi.exe (not php-cli.exe) and is typically located in the root folder of your PHP install folder. To

allow it to interact with the dynamic libraries, specify the location of the php.ini file. This can vary from system to system. If you are unsure, enter the command described above.

The system will identify the php.ini file and its location.

5.	Create the batch file.

a.	Click Scheduler in the Systems panel of the Admin page.

At the bottom of the default screen, you will see the contents of the commands you need to add to a batch file.

b.	Open notepad.exe, copy and paste what Sugar's recommendation into a blank file.

c.	Change the Save As Type to "dropdown to All Files *.*. " and save it as a .bat file.

Note:	This is only a recommendation. It may not work for your particular instance. Check the folder paths because they are often the cause for problems with the Scheduler.

6.	Test the batch file.

a.	From the command prompt, navigate to the folder where you saved the batch file.

b.	Enter the full name of the batch file to execute it.

c.	Note and correct any reported errors, usually related to paths that cannot be found.

7.	Create a scheduled task.

a.	Click Start and navigate to Control

	Panel/Scheduled Tasks/Add Scheduled Task.

b.	Go through the Wizard, browse to the batch file you just created, and select it.

c.	Schedule a daily job, and ensure that you select Open advanced properties for this task when I click finish.

d.	On the Advanced Properties page, navigate to the Schedule tab, and click Advanced.

e.	Check off Repeat task to enable the fields below it, and select Every Minute or specify the interval you think is appropriate.

8.	Save your changes and close the Wizard.

To schedule a job

1.	On the SchedulerActions bar, click Create Scheduler.

2.	In the Basic Setup sub-panel, enter the following information:

Job Name. Enter a name for the job.

Status. From the drop-down list, select Active to run the job at the specified intervals; select Inactive if you want to save the job schedule information but not run the job.

Job. Select a job from the drop-down list, or to run a script from a web server, enter the URL in the adjacent field.

Interval. Specify the time interval to check for new scheduled jobs.

By default, Sugar displays the basic option. Use this option to specify the time interval in minutes and hours. The default is every one minute daily.

To define a specific time, click the Show Advanced options link, and enter the time in minutes, hours, date, month, and day.

3.	In the Advanced Options sub-panel displays below, enter information for the following fields:

Execute If Missed. Select this box to run any jobs that the scheduler missed.
Date & Time Start. Click the Calendar icon and select the start date for the job;
select the time, in hours and minutes, from the adjacent drop-down list.
Date & Time End. Click the Calendar icon and select the end date for the job;
select the time, in hours and minutes, from the adjacent drop-down list.
Active From. From the drop-down list, select the time, in hours and minutes, when
the job becomes active.
Active To. From the drop-down list, select the time, in hours and minutes, when
the job becomes inactive.

4.	Click Save to create the job; click Cancel to exit the page without creating the job.

5.	To export one or more scheduler definitions in a .csv file format to a local machine, select them from the list and click Export.

To manage scheduled jobs

1.	Navigate to the System sub-panel on the Admin page, and click Scheduler.

Sugar displays the Schedule List page on the screen.

2.	Select any job from the job list to view its settings or the Job log. You can edit, duplicate, or delete the settings. You can also delete a job by clicking the del icon corresponding to the job in the Schedule list.

3.	To edit the settings, click Edit.

4.	Make the necessary changes and click Save to update the settings; click Cancel

Troubleshooting Tips

Linux

1.	The Sugar Scheduler fails to run even

	though the cron.log file shows that the crontab is triggering the new job.

	The Apache user's PATH does not include the location of the PHP binary.

l	Change the crontab entry to include the FULL path to the PHP binary as shown below:

* * * * * /usr/local/bin/php -f cron.php > /dev/null 2>&1

	The Apache user's PATH does not include the location of the php.ini file, and thus the external libraries (such as

l	Change the crontab entry to include a PHP switch to explicitly define a php.ini to use as shown below.

* * * * * php -c /path/to/php.ini -f cron.php > /dev/null 2>&1"

2.	No PHP binary found or it is broken.

	Change the mechanism by which your cron job calls Sugar's cron.php.

l	Determine if this is an option at this time by finding either curl or wget on your system. This is done with the commands which curl and which wget.

If you use cURL, your crontab entry should look as follows:
* * * * * curl --silent http://Domain/sugarInstance/cron.php
where Domain is the website where your Sugar installation resides, and
sugarInstance is your Sugar installation.
If you use wget, your crontab entry should look like:
* * * * * wget -q http://Domain/sugarInstance/cron.php

Note:	Both curl and wget have numerous switches that do not always map to different versions on different platforms. Experiment in the terminal until you find the perfect line, and add it as the line for your crontab entry.

Windows

| 1. | The most common problem is that the PHP binary does not have the proper libraries available at run time. As a result, it cannot make calls to your database or to your Email server. To force PHP to be aware of these libraries, it needs to access the php.ini file, which in turn tells it where to find everything that is available. |

| a. | Locate the php.ini file: if you are unsure, run the following command: |

phpinfo();
The system identifies the php.ini file and its location.

| 2. | The second most common breakage is incorrect paths to the extensions that PHP needs; a map is useless if the information is bad. |

| a. | Open php.ini in your favorite text editor. |

| b. | Find the section named Paths and Directories. |

| c. | The relevant entry is extension_dir. |

| d. | Keeping in mind that this file piggybacks on Window's $PATH$ variable, double-check the paths listed. |

| e. | Correct any errors - sometimes giving an absolute path solves hard-to-diagnose problems, for example, full path listing from c:\\... onwards. |

Necessary extensions are disabled.

| f. | Open your php.ini file in a text editor. |

| g. | Find the section named Dynamic |

	Extensions.

h.	Scroll down to the Windows-specific list.

i.	Make sure that the necessary extensions are uncommented (no ";" preceding the line). The bare minimum for Sugar Scheduler to run is to have php_curl, your database Connector, typically php_mysql (for PHP5), and php_imap.

j.	Test the batch file again.

Diagnostic Tool

Use this option to capture system configuration for diagnostics and analysis. The diagnostic tool pulls up system information and stores it in a zip file on the server for download. This file summarizes the basic information required to resolve the problem. Attach this file to the help request you sent to Customer Support.

To capture system configuration

1.	On the Diagnostic Tool page, click Execute Diagnostic to run the tool.

The system displays a list of system configuration files. By default, the system captures configuration information for all the selected files.
The system performs the following actions of these files:
SugarCRM Config.php - Copies the config.php file from the root directory after replacing the DB password with an asterisk for security purposes.
SugarCRM Custom directory - Copies the custom directory to a zip file to enable Customer Support to know what has been customized through the Layout Editor.
phpinfo() - Executes phpinfo and stores it in a file.
MySQL- Configuration Table Dumps - copies a few tables from the database and replaces sensitive information with an asterisk for security purposes.
MySQL - All Tables Schema - writes the schema for all tables to an HTML file.
MySQL- General Information - Pulls up some general information, like MySQL version, character sets, etc.
MD5 info - Runs md5 checks on all files in the sugar directory and compares it against a stock Sugar installation's md5s. This enables Customer Support to learn which, if any, files have been manually customized.
BeanList/BeanFiles files exist - If a custom module has been loaded, and the author did not define these references correctly, it can cause problems. This action checks all the references to ensure they are correct.

SugarCRM Logfile - copies the log file.
Sugar schema output (VARDEFS) - copies the Sugar database schema.

2.	Deselect the ones you do not want to view, and then click Execute Diagnostic

The system creates a zip file that contains the captured configuration information.

3.	To view the file, click the Download the Diagnostic file link at the bottom of the page; to delete the file, click the Delete the Diagnostic file link.

4.	If you choose to download the file, the File Download dialog box displays on the page. To view its contents, click Open, and click the file you want to view. To save the zip file contents, click

Themes

Use this option to manage Sugar themes for your organization. You can enable or disable a theme. Sugar displays only enabled themes in the Theme drop-down list from which users make their selection. By default, all themes are available to users. For Community Edition, the Classic theme is the nly available theme.

Activity Streams

Sugar Feed has been renamed My Activity Stream in Sugar Release 6.2.0. Select this option to enable the My Activity Stream functionality for your organization. My Activity Stream enables users to be informed as soon as any user creates a new Contact, Lead, Opportunity, or Case. Users are also notified of status updates when a lead is converted, when a case is closed, and when an opportunity is closed. When a user performs any of these actions, Sugar displays a message in the My Activity Stream Dashlet on the Home page.

You can activate My Activity Stream for one or more of the following modules: Leads, Cases, Opportunities, and Contacts.

Additionally, you can enable the My Activity Stream to allow users to post status updates, external links, images, and YouTube videos. Your organization can also create custom link types.

To enable and manage My Activity Stream

1.	In the System sub-panel, click My Activity StreamSettings.

The My Activity Stream Settings page displays on the screen. Specify the following settings.

Enable My Activity Stream. Select this option to enable this functionality for users in your organization.

ActivateMy Activity StreamFor: To activate My Activity Stream for a module, select the checkbox appropriate for the module.

ActivateMy Activity Stream.Select this option to enable users to post status updates, images, links, and YouTube videos.

2.	Click Save to save the settings. To delete all existing entries in the Activity Stream, click Delete My Activity Stream

My Activity Stream entries for images, links, and YouTube videos are automatically deleted after two weeks. If you add custom link types, you can clear them from the cache using the Repair - Quick Repair and Rebuild option.

Connectors

Use this option to manage Sugar Cloud Connectors to external data sources. Sugar provides Connectors to LinkedIn and InsideView.

Connectors are designed for company-type or person-type modules such as Accounts, Leads, and Contacts and for activity-type modules such as Meetings and Documents. You can enable all Connectors for any module, standard or custom, that is listed in Studio provided the module has a standard Detail View layout. For example, though the Knowledge Base module is listed in Studio, you cannot enable Connectors for it because it does not have a standard Detail View layout.

Note:	You can enable InsideView for Accounts, Opportunities, Leads and Contacts only.

For all Connectors except InsideView, you can also map Connector fields to fields in Sugar as described later in this section. InsideView displays as a separate panel within the Detail View pages of Accounts, Opportunities, Leads and Contacts records.

Connectors are enabled by default to allow users to search external data sources for new information from within a Sugar record in the module. Users can view the external data or merge it with the existing information in the Sugar record. For

example, they can update addresses and phone numbers for an account. For information on merging data, see Integrating data from external sources. You can disable Connectors, if needed.

Developers in your organization can create Connectors to other data sources, and you can upload them into Sugar using the Module Loader. You can also search for other available Connectors on Sugar Forge at http://www.sugarforge.org and Sugar Exchange at http://www.sugarexchange.com.

To configure Connector properties
You do not need to configure the Connector properties for InsideView. For all other Connectors, follow the steps listed below:

1.	Navigate to the System section of the Administration Home page, and click Connectors. This displays the Connector Settings page.

2.	Click Set Connector Properties.

The Set Connector Properties page displays tabs for the Connectors in Sugar. Tabs for any other Connectors that you install also display on this page.
To enable or disable modules for Connectors

1.	Click Enable Connectors on the Connector Settings page.

2.	Drag and drop module names from the Disabled to the Enabled column to enable Connectors like LinkedIn and InsideView, for the desired modules. To disable modules for Connectors like LinkedIn and InsideView, drag the modules from the Enabled list to the Disabled list.

3.	Click Save.

Mapping Connector Fields

You can map Connector fields to fields in a Sugar module to determine how the data is merged from the data source into the Sugar record. For the Connectors that Sugar provides, field mappings are set by default. You can change these mappings and also map additional fields.

To map Connector fields

1.	On the Connector Settings page, click Map Connector Fields. Each Connector tab displays a list of fields in the Connector and a corresponding drop-down list of fields in Connector-enabled Sugar modules.

2.	To change a default mapping or to add a new mapping, select the Sugar field from the drop-down list corresponding to the field in the Connector.

3.	Click Save to save the mappings.

Sugar uses these field mappings when merging data.

Global Search

Administrators can select the modules that users can search on when using Global Search. This includes both standard and custom modules that have been deployed in Sugar.

To Enable/Disable modules for Global Search
To enable/disable modules for Global Search, follow the steps listed below:

1.	Click the Admin link on the top right corner of your page to go to the Administration page.

2.	Click Global Search in the System section. This opens the Global Search page.

3.	Drag and drop modules between Enabled Modules and Disabled Modules

4.	Click Save.

Languages

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

OAuth Keys

OAuth (Open Authorization) is an open standard for authorization that enables users to share their private resources such as photographs, videos, and contact lists, stored on one site with another site without divulging personal credentials such as username and password. For more information, see this [wiki article](#).

You need a pair of keys (text strings) - a public consumer key and a private consumer key - to establish an OAuth connection. A good example of a public key is the username used in websites that require login. A good example of a private key is the password required for such websites. Note that this private key is not sent, making it more secure than a password. Together, these keys identify which application connects to the service. It is your choice, as an admin, to decide how many different keys to have and whom to give them to.

Use the OAuth Key link to create the pair of keys discussed above. Send the created keys to the consumer of the API (for example, application developers) to use for establishing an OAuth connection.

Tokens

Tokens are created when the user establishes OAuth connection with the OAuth key pair. These are the connections between the Sugar user, the OAuth keys, and the permissions and enable the external application/user to access data. Tokens created for each OAuth connection are listed in the Tokens sub-panel of the corresponding OAuth Consumer Keys Detail View page.

Last Modified: 01/16/2016 12:34am

Email

Overview

Administrators can setup and manage mail accounts for inbound and outbound emails, including campaign emails, using the options defined in this section.

Email Settings

Use this option to configure a mail server for outbound emails, enable email notifications to users when records are assigned to them, and specify which HTML tags, such as applets and frames tags, to strip from incoming emails before displaying them in Sugar.

To configure email settings

1.	In the Email section of the Administration page, click Email Settings.

2.	In the Outgoing Mail Configuration sub-panel, enter information for the fields listed below.

To add Google's Gmail server, click Prefill Gmail Defaults. The system fills in the SMTP Server and SMTP Port fields with the Gmail server's address and port number respectively.
From Name. Enter the sender's name; for example, the name of your organization.
From Address. Enter the sender's email address.

3.	Select your email provider, such as Gmail, Yahoo, or Exchange. If you are not using any of these, click Other.

4.	Enter the email address and password for the specified provider.

5.	Allow users to use this account for outgoing email. Select this option to allow all users to use the account, for which username and password were provided, to send emails using the outgoing mail server used to send system notifications and alerts. If you do not select this option, users will have to provide their own account information when using the outgoing mail server.

6.	Click Send Test Email to check if the settings are valid. If they are not, Sugar displays an error message.

7.	In the Email Options section, you can specify the following settings:

Assignment Notifications. Enable this option to send email notifications to users automatically when records are assigned to them.

Send Notifications from assigning user's email address.Select this option to send notifications from the email address of the user who is assigning a record to another user.

Delete related notes and attachments with deleted emails. When you select this option, related notes and attachments are deleted when an email is deleted.

8.	In the Email Security Settings section, you can specify the following information:

Select Outlook Default Minimum Security Precautions. Select this option if you do not want to strip the Style tag, which is used by Outlook.

Toggle all options. Check this box to strip all the listed tags from emails in the Email client. To strip some of the listed tags, uncheck this box and then select individual tags to strip.

9.	Click Save to save the settings; click Cancel to exit the page without saving your changes.

Inbound Email

Use this option to create and manage group mail accounts, and bounce handling accounts.

Group Mail Accounts: Allow multiple users to view and import emails from an external mail account. When you receive emails that are addressed to your organization but not to any particular user, you can route it to a Group mail account such as support@example.com or sales@example.com. Users can subsequently distribute emails in the Group mail account to other users.

Bounce Handling Accounts. A bounce handling account stores campaign emails that bounce back to you due to incorrect email addresses. You can create a bounce handling inbox separately for each campaign, or you can create one that is common to all campaigns. The system tags every bounced campaign email with a unique identifier that enables you to identify the campaign.

Creating Cases from Emails. When you create a group mail account, you can set it up to automatically generate cases from inbound emails. The email's subject line is

copied to the case's subject line and the body is copied as the case description. The email is related to the case and is listed in the History sub-panel of the case's Detail View.

Optionally, you can use the auto-reply template to automatically notify customers that you received their email. You can also to set up the template to notify them that a case has been created to resolve the issue. The Subject line of the email contains the number of the newly created case. The case number format follows the Case Macro setting that displays on the Inbound Email Home page. Sugar imports an email and associates it with a case based on the Subject line. When users send an email from the detail page of a case, the case number appears in the Subject field of the email.

The Case Macro field displays the default case macro string. To customize it, you can change CASE to a different word, but you must preserve the rest of the string.

To set up a Group mail account

1.	From the Actions bar on the Inbound Email tab, click New Group Mail Account.

Sugar displays the Group Mail Account page on the screen.
In the Mail Account Information section, enter information for the following fields:
Name. Enter the user's name, or an alternate name for the mail account.
Mail Server Address. Enter the address of the external mail server.
Mail Server Protocol. Select IMAP from this drop-down list. Additional fields display on the screen to select the folder you want to monitor, a Trash folder to store deleted emails, and a Sent folder to store copies of outgoing emails.
Monitored Folders. This field displays when you select IMAP as the protocol. By default, the system monitors the Inbox. To monitor other folders, click Select to view a list of available folders in the external mail account. To select multiple folders, hold down the Shift key or the Ctrl key. After you select the folders that you want to view in Sugar, click OK to view them in your inbox.
Trash Folder. To select a Trash folder from the Folders list, click Select. After you specify the trash folder, click OK.
Sent Folder. To add a folder to view your outbound emails, click Select. After you specify a folder, click OK.
Status. From the drop-down list, select Active to activate the Group mail account or Inactive to deactivate it. Users cannot view emails from a deactivated account.
User Name. Enter the username to access the mail server.
Password. Enter the user's password to access the mail server.
Mail Server Port. Enter the server port number.
Use SSL. If your mail server supports secure socket connections, selecting this box will force SSL connections when importing emails into Sugar.

2.	In the Email Handling Options section, enter information for the following fields:

From Name. Enter the name of the person or company that will send the emails.
From Address. Enter the email address from which emails will be sent.
Reply-to Name. Enter the name to which you want replies to be addressed.
Reply-to Address. Enter the email address associated with the Reply-to name.
Allow User to Send Emails Using "From" Name and Address. Select this option if you want to enable users to use this account's From name and address as their Reply To address.
Import Emails Automatically. Select this option to create email records automatically in Sugar for all incoming emails.
Create Case from Email. Select this option to create cases automatically from inbound emails. When you select this option, you will need to specify how the emails are distributed in the Distribution Method field.
Distribution Method. This field displays only when you select the Create Case option and allows you to select Round-Robin or Least-Busy. With the Round-Robin option, the system distributes cases evenly among all users within the specified team. With the Least-Busy option, the system distributes cases to the least busy user within the team assigned to the Group folder.
New Case Auto-Reply Template. This field displays only when you select the Create Case option. You can use a Case Reply template to set up an automated response notifying email senders that a case has been created to resolve their issue. You can select an existing template from the drop-down list, or click Create to create a new template. The response contains the system-generated case number in the subject line of the email. The body of the email for which the case was created displays below the template text.
For information on creating email templates, see Creating Email Templates.
Auto-Reply Template. Use this template to set up an automated response notifying email senders that you received their email. From the drop-down list, select an existing template, or click Create to create a new one. If both templates are selected, Sugar will respond to the sender with the Create Case Reply template instead of the Auto-Reply template.
No Auto-reply to Domain. To exclude a domain from receiving the automatic email response, enter the domain name. It is common to specify your organization's domain to prevent auto-replies from being sent to your organization's members.
Number of Auto-responses. Set the maximum number of auto-responses to be sent to a unique email address during a period of 24 hours.

3.	Optionally, click Test Settings to ensure that the settings are accurate.

4.	Click Save to save the settings.

The system creates the mail account and displays its detail page.
To set up a bounce handing mail account

1.	Select New Bounce Handling Account from the Inbound Emails Actions bar .

2.	Enter the required information as described in To set up a Group mail account.

3.	Optionally, click Test Settings to ensure that the settings are accurate.

4.	Click Save to save the settings.

The system creates the bounce handling account and displays its detail page.
To manage group mail accounts and bounce handling accounts

•	To view the details of an account, click its name in the Inbound Email home page.

•	To activate and deactivate multiple accounts, or change team assignments, select them in the List View and use the Mass Update panel to make the changes.

•	To edit an account, click Edit in the Detail View, revise the information, and click Save.

•	To duplicate an account, click Duplicate

•	To delete a mail account, select it from the List View and click Delete. Alternatively, click Delete from the Detail View. To delete multiple group mail accounts, select them in the List View and click Delete.

Campaign Email Settings

You can specify settings for email campaigns from the Campaigns module. From

the Administration Home page, you can change some default values, namely, the number of emails sent per batch and the location of the campaign tracking files. You can also specify whether you want to keep copies of campaign messages or not.

To configure campaigns email setup from Campaigns module

1.	On the Campaigns Actions bar, select Set upEmail.

The Email Setup section displays the default values for the following. You can enter new values, if needed:

From Name. Sugar display the name entered on the Email Settings page.
Mail Transfer Agent. Select the mail transfer protocol from the drop-down list. SMTP is the default protocol.
From Address. The email address for the sender.

Note:	The name, address, and mail transfer agent information that display on this page reflect the default values set on the Email Settings page. Hence, any change that you make to these values reflect on the Email Settings page and not the Campaign Email Settings page that you access from the Administration Home page.

SMTP Server. Enter the name of the SMTP server.
SMTP Port. The system displays the SMTP port number.
Use SMTP Authentication. To use SMTP authentication, check this box and enter the email account username and password in the fields that display below.
Enable SMTP over SSL or TLS: Select either SSL or TLS from the drop-down list.
In the Mass Mailing Options section, enter the information shown below. You can also enter this information using the Campaign Email Settings option on the Administration Home page.
Number of emails sent per batch. Enter the maximum number of emails to send per batch.
Location of campaign tracking files. Campaign tracking files log responses from campaign targets. If you are running Sugar on an external network, select Default
Keep copies of campaign messages. The Default is No. Selecting No will store only the template of the campaign message and the required variables to recreate the message.
Selecting Yes will save a copy of all email messages sent during all campaigns in the Sugar database. This takes up space in the Sugar database and slows down performance. Hence, it is strongly recommended that you use the default setting.

2.	Click Next.

The page displays existing bounce handling mail accounts.

3.	To create a bounce handling mail account, click Create New Mail Account

4.	Enter the mail account information as described in To set up a Group mail account and click Next.

The system displays a summary page that lists the specified settings.

5.	Click Save to save the settings and create a bounce handling inbox; to navigate back to the previous screen, click Back; to go back to the Campaigns Home page without saving any of the specified information, click Cancel.

To configure campaign email setup from the Administration page

1.	Navigate to the Emails section on the Administration Home page, and select Campaign Email Settings.

Sugar displays the Campaign Email Settings configuration page on the screen.

2.	Specify mass mailing options as described in To configure campaigns email setup from Campaigns module

3.	Click Save.

The updated settings display on the page as well as on the Email Setup page of the Campaigns module

Email Queue

Use this option to view, send, and delete mass campaign emails that are in the queue for dispatch. The system sends out the email only after the start date/time has passed. After a campaign email has been processed, you can view its status in the Campaign module. The system tracks statistics such as the Sent date and number of times an email delivery was attempted.

Use the Scheduler to run nightly mass email campaigns as well as to monitor bounced campaign emails. For more information on scheduling email mailings, see Scheduler.

To manage queued emails

1.	To send out campaign emails, select the campaign in the Queue sub-panel below and click Send Queued Campaign Emails.

You can select more than one campaign at a time.

2.	To delete campaign emails, select the campaign in the Queue sub-panel below and click Delete; click OK to confirm the deletion.

3.	To search for a specific campaign, enter the campaign name, or recipient name, or recipient address in the Search fields above and click Search; click Clear to clear the search fields.

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Developer Tools

Overview

The Developer tools section displays options that enable you to build new modules and customize existing ones.

The Module Builder enables you to build custom modules; Studio enables you to customize existing modules. To create relationships between modules, see Creating Relationships.

After you build a module in Module Builder, you can deploy the module directly within the current instance, or you can use the Module Loader to install it in another Sugar instance. For more information, see Module Loader.

Module Builder

Use the Module Builder to create custom modules in Sugar.

The process of creating a custom module is as follows:

1.	Create a package to house the new module. You can create one or more modules within a package.

2.	Create a module using one of the following templates that Sugar provides for you.

Basic. This template provides basic fields such as ID, Date Entered, and Created By. Use this template to create a module from scratch.

Company. This template provides organization-specific fields such as Company Name, Industry, and Billing Address. Use this template to create a module that is similar to the Accounts module.

File. This template provides document-specific fields such as File Name and Document Type. Use this template to create a module that is similar to the Documents module.

Issue. This template provides case and bug-specific fields such as ID, Description, and Created By. Use this template to create a module that is similar to the Cases module or Bug Tracker module.

Person. This template provides individual-specific fields such as salutation, title, name, address, and phone number. Use this template to create a module that is similar to the Contacts module or the Leads module.

Sale. This template provides opportunity-specific fields such as Lead-Source and Probability. Use this template to create a module that is similar to the Opportunities module.

3.	Create new fields, if necessary. You can also rename default fields from the template.

Note:	Apart from field names, you cannot edit other field properties in a template. However, you can duplicate the fields and save them with a different name to customize them. You can choose which fields appear in the module layouts.

4.	Customize page layouts for List View,

	Edit View, Detail View, Sub-panels, Search form, and Sugar Dashlets, if necessary.

5.	Create relationships between the new module and other modules, if needed. A Sugar module, typically, has multiple relationships with other Sugar modules. When you create a custom module, you can define its relationship with other Sugar modules.

6.	Save the package and distribute it.

You can choose one of the following options to distribute the package:

	Publish. This option is designed for distribution to specific users or customers. The system creates a zip file, which you can save on your local machine. You can then email it to one or more individuals who can use the Module Loader to upload the zip file into their Sugar instance.

After the module is installed through Studio, you can add or remove fields and make other changes to a published module.

	Deploy. This option is designed to install the custom module on your Sugar instance and make it available to users in your organization. After deployment, if needed, you can make further changes to the module in Module Builder and deploy it again to update the installed module.

You can also add or remove fields and make other changes to a deployed module through Studio. However, note that if you change a deployed custom module in Studio and then re-deploy it from Module Builder, the following information will be lost:

l	Custom field labels will be lost and, hence, will not display in the page

	layouts even though the custom fields and the associated data exist in the database.

l	The layouts for the custom module will be lost and will have to be created again. If you created custom fields in Studio and added them to the layouts prior to re-deployment, you will have to add them again to the layouts in Module Builder.

l	Custom relationships will be lost. The relationship tables and relationships between records that are stored in those tables are deleted from the database.

	Export. This option is designed for distribution to developers. The system creates a zip file, which you can save on your local machine and email to other developers. Using the Module Loader, developers can install it on their Sugar instance and customize it further in Module Builder if necessary. The package is visible only in Module Builder and, hence, only administrators can access it until it has been deployed.

To create a package

1.	In the Developer Tools sub-panel, click Module Builder to view the Module Builder page.

2.	Click New Package.

Sugar displays the Package page on the screen.

3.	Enter a name for the package and click

The system refreshes the page and displays options to duplicate, publish, deploy, export, and delete the package.

| 4. | Enter information for the following fields: |

Author. Enter your name as the creator of the package.

Key. Enter an alphanumeric key to distinguish modules with similar names. The system will prefix all class names, directories and tables names with this key.

Description. Enter a brief description of the package.

| 5. | Click Save to create the package; to delete the package, click Delete. |

| 6. | After you save the package, if you want to create a copy, click Duplicate. |

The system appends a 1 to the package name and saves it as a new package.

| 7. | To publish the package after saving it, click Publish. |

| 8. | To deploy the package on your Sugar instance after saving it, click Deploy. |

| 9. | Click Export to save the package as a zip file on your local machine. |

To create a module

| 1. | Click the New Module icon on the Package page. |

The Module page displays on the screen

| 2. | Enter information for the following fields: |

Module Name. Enter a name for the module.

Label. Enter a name for the module that you want displayed in the Sugar User Interface.

Importing. Selecting this option to allow data import into the module.

Navigation Tab. By default, this option is enabled to create a tab for the module that is identical to other Sugar module tabs.

Type. Click a template to select it for your module

3.	Click Save to save the module and add it to the package.

The system refreshes the page to display the selected template. The new module is nested within the package listed in the Packages panel on the Module Builder home page.

The Packages panel on the left lists all the modules you create within a package. Default fields, labels, layouts, sub-panels, and relationships from the selected template are nested under the module. You can click them to view their details. You can also edit the default layouts, add new fields, and create relationships with other Sugar modules.

For information on customizing a layout or the Search form, see Editing Layouts for Sugar Modules. For information on creating new fields, see To add fields. For information on defining relationships, see Creating Relationships.

To edit Sugar Dashlets

1.	On the custom module page, click View Layouts. Alternatively, click Layouts in the Packages panel on the left.

2.	Click SugarDashlet.

You can edit the List View and the Search form for Sugar Dashlets.

3.	To edit the List View, click SugarDashlet List View and follow the procedure described in To edit List View.

To edit the Search form, click SugarDashlet Search and follow the procedure described in To edit the Search form.

To distribute or install a package

1.	In Module Builder, select the package and click Publish, Deploy,or Export.

When you select Publish or Export, the system saves it as a zip file that you can export to your local machine and distribute as needed. When you select Deploy, the system installs all the custom modules in the package on your Sugar instance.

| 2. | When you choose Publish or Export, select Save to Disk and click OK. |

Use the Module Loader to upload the file from your machine into Sugar and install the module. For more information, see Module Loader.

Deleting Packages

You can delete a package if necessary. When you delete a package, all the files that it contains are also deleted. If you delete a package after it has been deployed, you can uninstall the deployed package using the Module Loader. When you uninstall a package, you have the option of retaining or removing the database tables.

You do not need to delete a package before you install a newer version. The files from the new version will override any existing files from the earlier package. That is, any updates that you made to the package before re-deploying will override files from the earlier package.

Module Loader

Use the Module Loader to install Sugar modules, custom modules, upgrades, language packs, Sugar Dashlets, and themes.

You can create custom modules in the Module Builder. A custom module is contained within a package. When you deploy the package, it becomes available to other users in your organization. When you publish or export the package, you can save it as a zip file on your local machine and then use the Module Loader to upload them it into Sugar. For more information on creating packages, see Module Builder.

If you delete a package in Module Builder after it is already installed or deployed, you can uninstall the deployed module in the Module Loader. You can also disable installed modules through the Module Loader.

To install a module

1.	In the System sub-panel of the Administration Home page, click Module Loader.

If you deployed the package, it is listed in the top panel and has already been made available to other users in your organization. You can uninstall it or disable it by clicking the appropriate button.

2.	Click Browse to navigate to the location of the module's zip file on your local machine.

3.	Select the file and then click Open.

The path to the zip file displays in the Module field.

4.	Click Upload.

The uploaded module displays in the bottom panel.

5.	Click Install.

The license agreement displays on the screen.

6.	Select Accept to accept the agreement and then click Commit to install the module.

If the installation is successful, the system displays a message stating that the module installed successfully.

7.	To go back to the Module Loader page, click Back to the Module Loader.

The new module's tab is now visible to all users.

To disable and enable a module

1.	To disable a module, click the Disable button located next to the module's name.

Sugar displays the License Agreement on the page.

2.	Click Accept to accept the agreement.

3.	Click Commit.

After the module has been disabled, Sugar displays a message stating that the module has been disabled.

4.	Click Back to Module Loader.

The Enable button displays next to the module's name.

5.	To enable the module, click Enable.

To uninstall a module

1.	In the Module Loader, click the Uninstall button corresponding to the module's name.

The system displays a message stating that the module is ready to be uninstalled and displays options to remove or retain the database tables that were created for the new module.

2.	To remove the tables from the database, select Remove Tables; if not, select Do Not Remove Tables.

3.	Click Commit to uninstall the module; click Cancel to retain the module.

4.	Click Save.

Studio

Studio enables you to customize modules by adding new fields, editing existing fields, field labels, page layouts, sub-panels, and Quick Create forms. After you customize a module, you can export it to your local machine and upload in into another Sugar instance using the Module Loader.

The Studio home page displays a list of existing modules in the left panel. These include the default Sugar modules as well as any custom modules that have been deployed. The associated fields, labels, layouts, and sub-panels for each module are grouped within the module. You can click the Plus sign (+) preceding the module name to view them. The right panel displays the same information in the form of icons. You can click a module in either panel to drill down to its fields, labels, layouts, and sub-panels.

The bottom of the page displays buttons to the (Developer Tools) Home, Studio, Module Builder, and the Dropdown Editor.

Editing a Module

You can create and edit custom fields, drop-down lists, and field labels for a module. You can also edit the default fields, layouts, and sub-panels. After you edit a module, the updated version will not be available to other users until you publish it. You can use Studio to make changes to a published module.

Note:	If you make changes to fields and layouts of a custom module in Studio, some information will be lost if the module is re-deployed from the Module Builder. For more information, see the description of Deploy in Module Builder

To edit a module

1.	In Studio, select the module that you want to edit.

2.	Select from the following options:

Labels: Select this option to edit field labels. For more information, see Editing Field Labels.
Fields: Select this option to create custom fields, and to edit default fields and custom fields. For more information, see To add fields. Select this option to edit and create drop-down lists. For more information, see Dropdown Editor.
Layouts: Select this option to edit the List View, Detail View, Edit View, Search, and Quick Create forms. For the Leads module, you can also edit the Convert Lead form. For more information, see Editing Layouts for Sugar Modules.
Relationships: Select this option to view existing relationships and create new ones between modules. After you create a relationship, you will need to deploy it to make it available to users. For more information, see Creating Relationships.
Subpanels: Select this option to edit one or more of the module's sub-panels. For more information, see To edit a sub-panel.

3.	Click Save.

Editing Field Labels

You can edit field labels, button labels, link labels, module titles, and pop-up window messages using the Label editor. You can also change the default field labels for all the language packs that you have installed. Every module list displays the database fields and the labels they map to in the user interface.

Using the Label Editor instead of the Layout Editor to edit multiple labels for a module reduces the time to edit them.

To change field labels

1.	Select the module and click Labels.

A list of existing database fields and the labels to which they are mapped displays on the page.

2.	If you want to select a different language pack, select the appropriate one from the list of pre-installed language packs in the Language drop-down menu.

3.	Select the label that you want to edit and enter the new name.

4.	Click Save.

5.	To navigate back to a different module or to Studio, click the appropriate breadcrumb above the Save button.

Creating and editing Fields

You can add custom fields to any module in Sugar. When you add a custom field, the application adds the field to the appropriate database table and stores the generated metadata. You can then add the fields to the desired layout, such as Edit View and Detail View. For custom modules, you can create fields in the Module Builder.

Use Studio to edit fields in a custom module after it has been published.

The Field Editor allows you to edit some properties of custom fields and change the display label and some properties of standard fields such as the field length, row size, and column size. You can also mark a standard field as a required field or an audited field. These properties are described in To add fields.

Note:	You cannot change the field name or data type of existing fields. However, you can change the display label.

To add fields

1.	To add a new custom field to a module, select the module and click Fields.

The page displays the current default fields that Sugar provides as well as any existing custom fields.

2.	Click Add Fields.

The Field Editor displays the field types as shown below:
The information that you need to specify varies depending on the selected data type.

3.	In the Field Editor, enter values for the following:

Data Type. From the drop-down list, select one of the data types listed below.

	Text Field. Creates a text field for fields such as first name and last name.

	Address. Creates fields for street, city, postal, state, and country.

	Checkbox. Creates a checkbox for data fields with a Yes/No action; users can click the checkbox to turn on or turn off the action.

	Currency. Creates a field to enter a currency. The system automatically creates a field of the currency type if the field does not exist.

	Date. Creates a field to enter a date.

	DateTime. Creates a field to enter the date and time. Enter the default values in the field that displays when you select this data type. You can select a date and time, such as first day of next month, 12:00pm from the drop-down list below.

	DropDown. Creates a field that you can associate with a drop-down list of values. For more information on drop-down lists, see Dropdown Editor.

	Decimal. Creates a field to hold a number with a specified precision past the decimal point. Sugar stores the exact representation of the number in the database. For example, 1.23 is stored as 1.23.

	Float. Creates a field to hold a number with a specified precision past the decimal point. Sugar stores a very close approximation of the specified value. For example, 1.23 may be stored as 1.2345670000. Because using the Float data type instead of the Decimal data type enhances performance, it is recommended that you use it if exact precision is not required.

	HTML. Creates static HTML-formatted text to display in record views.

	IFrame. Creates an IFrame field. For more information, see Embedding Links and IFrames in a Layout.

	Integer. Creates a field to specify positive or negative numbers. You can specify a range with the Min and Max

	Value fields.
	MultiSelect. Creates a drop-down list of values. Users can select one or more values from the list.
	Flex Relate. Creates a drop-down list from which you can associate a related record. Because you can add only one Flex-Relate field to a module, this option does not display in the Data Type drop-down list if you attempt to add it to a module that already contains a Flex Relate field.
	Phone. Creates a field to enter a phone number.
	Radio. Creates a radio button.
	Relate. Creates a field to associate a record with another record as a one-way relationship. You can add multiple Relate fields to a module. The Users module can be selected for custom Relate fields that can be used to relate records to Users.
Note:	Relate fields and custom relationships are independent of each other. Changes made to either one are not reflected in the other.
	Text area. Creates a large field for a block of text.
	URL. Creates a field that links to a URL.
	TextField. Create a field for text.

Depending on the data type that you select, you will need to specify values for some of the fields listed below.

	Field Name. Enter a name for the field. The system adds it to the Sugar database. Do not use spaces or special characters.

	Display Label. The system uses the field name as the label that will display in the Sugar User Interface. You can enter a new value if needed.

	System Label. Sugar auto-populates this field with the label that it uses internally to refer to the field. This is the label that Sugar displays on the module's Edit Labels page in Studio. You can change this value.

	Help Text. Enter descriptive text for the field. Sugar displays this text when the user points the cursor at the field. Regular users cannot view this text.

	Comment Text. Enter additional comments, if needed, about the field.

	Default Value. Enter a default value for the field, if necessary.

	HTML. Sugar displays this text box when you select the HTML data type. Enter the HTML code in this box.

	Max Size. Enter the maximum number of characters that users can enter in the field. This is for text data fields.

	Mass Update. Sugar displays this option when you select the DropDown data type or the Date data type. Use it to add the field to the module's Mass Update section. Data types that are available for Mass

	Update are listed below:
	• Date • Datetime • DropDown • MultiSelect • Radio Data types that are not available for Mass Update are listed below: • Address • Checkbox • Currency • Decimal • Float • HTML • IFrame • Integer • FlexRelate • Phone • Relate • TextArea • URL • TextField The following field is available for Mass Update: • Assigned to

	Drop Down List. For DropDown, MultiSelect, and Radio field data types. For information on creating a drop-down list, see To create a drop-down list.

	Min Value. Sugar displays this field if you select the Integer data type. Enter a minimum value during data input.

	Max Value. Sugar displays this field when you select the Integer data type.

	Enter a maximum value during data input.

	Precision. Sugar displays this field when you select the Decimal data type. Enter a number to specify the number of digits to the right of the decimal point.

	Required Field. Select this option to specify that users must enter a value for the field when creating a record.

	Audit. Select this option to display field values when a user clicks View Change Log on a record's Detail View.

	Importable. From the drop-down list, select one of the following:

Select Yes to enable users to import a value into the field.
Select No to prevent users from importing a value into the field.
Select Required to make it a required field during import.

	Duplicate Merge. From the drop-down list, specify one of the following options for the Duplicate Merge functionality that allows users to merge records from a record's Detail View.

l	Enabled: The field will appear on the Merge Duplicates page, but will not be available as a filter condition on the Find Duplicates page.

l	Disabled: The field will not appear on the Merge Duplicates page, and will not be available as a filter condition on the Find Duplicates page.

l	In Filter: The field will appear on the Merge Duplicates page and will also be available in the Find Duplicates page.

l	Filter Only: The field will not appear on the Merge Duplicates page, but will be available on the Find Duplicates page.

l	Default Selected Filter: The field will be used for a filter condition by default on the Find Duplicates page, and will also appear on the Merge Duplicates page.

4.	Click Save to create the field.

The new field is listed in the Custom section. The system appends the field name with '_c' to indicate that it is a custom field. You can now add the field to the desired layout of a module.

To edit fields in Studio

1.	Select the module and click fields to navigate to the Edit Fields page.

The Edit Fields page displays custom fields in the Custom section and default fields in the Default section.

2.	Click the field to view its properties in the Field Editor.

3.	Edit the properties as needed and click

You can view the updated field in the module's records.

To manage fields

•	To duplicate the field, click Clone, enter a new name, and click Save.

•	To delete the field, click Delete. You must also remove the field from any layout to which it was added.

Editing Subpanels

Every record's Detail View displays sub-panels for related records from other modules. You can add or remove fields for these sub-panels depending on the information that you want to display to users. You can also rename a sub-panel if needed.

To edit a sub-panel

1.	Select the module and then click Subpanels.

Sugar displays the sub-panels for the selected module on the page.

2.	Select the sub-panel that you want to edit.

The page displays the list of default fields and a list of fields that are available for display.

3.	To change the sub-panel's name, enter the new name in the Title field.

4.	To add a field to the sub-panel, select it from the Hidden column and drag it to the Default column.

5.	To remove a field from the sub-panel, select it from the Default column and drag it to the Hidden column.

6.	To save and display your changes in the module, click Save & Deploy.

7.	If you do not want the changes that you made, click Restore Default to change back the layout to its original form.

Note:	You cannot use the Restore Default button to restore the default title of the sub-panel.

8.	To view a list of time stamps for changes that were made to the sub-panel, click View History.

You can view changes that were made at a particular time on a certain date and reinstate those changes if needed. For more information, see To preview and restore changes.

Editing Layouts for Sugar Modules

You can edit the page layouts for modules in Sugar. You can move fields, add fields, and remove fields. You can also change the tabbing order to move from field to field.

The breadcrumbs to navigate back to Studio display above the layout. The Toolbox stores fields that are not currently displayed in the layout. It also provides new rows to add to the view and a list of available fields that you can add.

You can edit the following layouts for a module:

•	List View

•	Detail View

•	Edit View

•	Convert Lead form for the Leads module

•	Quick Create form

•	Sugar Dashlet

	List View

	Search

•	PopupView

	ListView

	Search

•	Search

	Basic Search form

	Advanced Search form

•	Sub-panels

List View Layout

When you select List View, the system displays separate columns of fields that are currently displayed in the view, fields that are available for display, and hidden fields. You can click and drag a field from one column to the other depending on what you want to display to users.

Detail View, Edit View, and Quick Create Form Layouts

When you select Detail View or Edit View, the system displays the various sections of the current layout, along with the fields in each section. You can click and drag a field to a different location within the layout.

For Edit View, Detail View, and Quick Create forms, you can also change the order in which the user tabs from field to field. For example, when users create a new account, they can tab from the Account Name field to the Websitefield and so on. You can change the tabbing order to so that users tab from account name to email.

To edit List View

1.	In Studio, select the module.

2.	Click Layouts, and then click ListView.

To edit a Sugar Dashlet List View, navigate to Layouts>Sugar Dashlet>Sugar Dashlet ListView.
To edit the List View for a Pop-up window, navigate to Layouts > PopupView> Popup ListView. Sugar displays the Pop-up window when you click Select in the sub-panel of a related module in a Detail View.
Sugar displays the List View page on the screen. The Default column lists fields that currently display in the User Interface. The Available column lists fields that are available to users through Advanced Search. Users can search for and add any of these fields that they want to view in the search results. The Hidden column lists fields that you do not want users to view when they perform an advanced search.

3.	To display a field in List View, select and drag the field from the Available or Hidden column and drop it into the Default column.

4.	To remove a field from List View, select and drag the field from the Default column and drop it in the Available

| | column. |

| 5. | To hide a field from users, drag it from the Default or Available column and drop it in the Hidden column. |

| 6. | To move a field within the layout, drag and drop it into its new location. |

| 7. | Click Save & Deploy to display the updated List View in the User Interface. |

| 8. | Click View History to view a list of previous changes along with the date and time of each change. |

| a. | To preview the changes made at a particular time, click the adjacent Preview button. |

| b. | To restore the previous version of the List View, click the adjacent Restore button. |

| 9. | To revert back to the default layout, click Restore Default. |

To edit a Detail View, Edit View, or Quick Create form

| 1. | Select the module in Studio. |

To edit the Detail View layout, navigate to Layouts > Detail View
To edit the Edit View layout, navigate to Layouts > Edit View
To edit the Quick Create form layout, navigate to Layouts > Quick Create.
To edit a layout for Sugar Mobile and Sugar Mobile for iPhone, navigate to Layouts

| 2. | You can edit a layout as follows: |

| | To add new fields or replace existing ones with blanks, drag the filler row under New Row and drop it into the layout. You can then drag a field from the Toolbox into the filler row. |

Note:	In the Edit View layout of the Leads module, the First Name and Last Name fields are used to input the lead's name. Sugar concats these two values to display the lead's name in the Detail View.

	To remove an existing field, drag it to the Recycling Bin in the Toolbox. The field is removed from the layout, but is not deleted from the system.

	To replace an existing row in the layout with another one, drag the new field from Available Fields and drop it on the field that you want to replace.

	To create a panel or row, drag New Panel or New Row into the Current Layout.

	A new panel or row contains two blanks fields. To add more fields to the panel or row, drag New Panel or New Row into the panel again.

	To enter or edit a field label, click the Edit icon within the field and enter the label in the Properties panel; click Save

	To move a field to a different location, drag it to the desired location on the page.

	To edit the tabbing order, click the Edit icon within the field and enter a numeric value in the Tab Order field of the Properties panel; click Save. The tabbing order for each field is represented by numbers such as 1, 2, and 3. You can change one or more numbers to change the order in which users tab to those fields.

	To display each panel as a separate tab instead of displaying all panels on one page, select the Display Tabs as Panels option located next to the Restore Default button.

3.	Click Save to save your changes.

4.	Click Save & Deploy to display the updated view in the Sugar User Interface.

5.	Click View History to view a list of previous changes along with the date and time of each change.

a.	To preview the changes made at a particular time, click the adjacent Preview button.

b.	To restore the previous version of the view, click the adjacent Restore button.

6.	To revert back to the default layout, click Restore Default.

Copy/Sync Edit and Detail Views

Modifications made to the Edit View in Layouts can be copied to the Detail View. The Layouts Detail View can also be synced with the Edit View so that any changes made to the Edit View are automatically reflected in the Detail View.

To copy/sync Edit and Detail Views
Follow the steps listed below to sync modifications made to the Edit View of Layouts of a module, for example Accounts, to the Detail View of the Layouts of the same:

1.	Click Studio in the Developer Tools section of the Administration page.

2.	Select Layouts under Accounts in the Modules section.

3.	Click EditView in the Accounts Layouts pane.

4.	Drag and drop items between the Toolbox and Layout sections.

5.	Select the Sync to DetailView checkbox.

6.	Click Save and Deploy.

7.	Go to the Accounts module in Sugar to verify that the changes have been deployed

To edit the Search form

1.	To edit the Search form for the module, click the module, navigate to Search, and select BasicSearch or Advanced Search.

To edit the Search form of the module's Sugar Dashlet, navigate to Sugar Dashlet > Sugar Dashlet Search.
To edit the module's Popup View Search form, navigate to PopupView > Popup Search.
The fields in the current Search form are listed in the Default column, and the available fields are listed in the Hidden column.

2.	To remove an existing field from the search form, drag it from the Default list to the Hidden list.

3.	To add a field to the search form, drag it from Hidden column to the Default column.

4.	To save your changes, click Save & Deploy.

5.	To revert back to the default layout, click Restore Default.

To preview and restore changes

| 1. | Click View History to view a list of time stamps for changes that were made to a layout, a Search form, or a sub-panel. |

| 2. | To preview the changes for a timestamp, click the adjacent Preview button. |

The Preview page provides a Restore button that corresponds to each timestamp. You can use this button to restore the changes made for a specific timestamp. Alternatively, click a timestamp to restore the layout that existed before the changes made at that time.

To edit the Convert Lead form

| 1. | In Studio, select the Leads module and navigate to Layouts. |

| 2. | Select Convert Lead to view the Convert |

This page displays a list of related modules, such as accounts, opportunities, notes, and so on. Users can create these related record during the process of converting a lead to a contact. You can add and remove related modules as needed.

| 3. | If you want the user to create a record in a related module during lead conversion, select the Required box corresponding to the module. The user will then have to create the related record in order to successfully convert the lead to a contact. |

| 4. | To copy values from fields that exist in both Leads and a related module to the newly created records, select the Copy Data box corresponding to the related module. The fields must have the same name in both modules. For example, if you add a custom field called Category to both Leads and Notes, and then enable the Copy Data option for the Notes module, the Category field in Leads will be copied into any new Notes created during the convert Lead process. |

5.	To select a record from a module that has a one-to-one relationship, or a one-to-many relationship with the Contacts module (that is, many contact records associated with one record in the related module), select the Allow Selection box. By default, only the Accounts module has a relationship with the Contacts module, hence the Allow Selection box is selected for Accounts.

6.	To edit a module's page layout, click the Edit icon, make the necessary changes, and click Save.

7.	To remove the relationship with a related module, click the Delete icon, and click OK to confirm the removal.

The deleted module no longer displays in the list of related modules in the Convert Lead form.

Exporting Module Customizations

You can export a module's customized layouts, fields, and field labels from one Sugar instance to other Sugar instances. To do this, you will need to package the customizations in Studio, export it to your local machine, and upload it into another Sugar instance. The system applies the customizations to the appropriate layouts, fields, and field labels.

To publish a customized module

1.	On the Studio home page, click Export Customizations.

The Export Customizations page displays a list of customized modules and the type of customization, such as customized layouts, fields, or labels.

2.	Enter the following information:

Package Name. Enter a name for the export package. The package will contain the customizations that you select.
Author. Enter your name as the author.
Description. Enter a brief description of the package.

3.	Select the customizations you want to export.

4.	Click Export.

The system creates a zip file and displays a dialog box that allows you to open the file or save it to a disk.

5.	Select Save to Disk and click OK.

On Windows, the system saves the zip file in the Downloads directory.

6.	Open the other Sugar instance, upload and install the zip file using Module Loader. For more information, see Module Loader.

Embedding Links and IFrames in a Layout

A Link field allows you to store a URL in a record such as a customer's website or a link to a related internal or external system. The URL can either be entered as a normal field in an Edit View, or it can be dynamically generated based on other fields in the record. For example, you can automatically generate a link to a Google map of an account's address. To do this, click the Generate URL check box and insert the following in the Default Value field:

http://maps.google.com/?q=

Next, select billing_address_postalcode from the drop down above the Default Value field and click the Insert Field button.

The default value now reads:

http://maps.google.com/?q={billing_address_postalcode}

You can also embed a view of the website itself in the layout rather than as a link by using the IFrame field. IFrames support regular URLs as well as generated URLs.

You cannot edit generated URLs in a record's Edit View. You can only change them in the Module Builder or Studio. You can edit regular URLs in a record's Edit view.

To embed a manually entered URL

1.	From the Data Type drop-down list,

	select IFrame or URL.

2.	Enter a name for the field.

3.	Enter the desired max size.

4.	If using an IFrame, enter the desired height in pixels for the view.

5.	Click Save to create the field.

To embed a dynamically generated URL

1.	From the Data Type drop-down list, select IFrame or URL.

2.	Enter a name for the field

3.	Click the Generate URL checkbox.

4.	Insert the base URL into the Default Value field.

5.	Select a field you wish to include in the URL from the dropdown and click Insert Field.

6.	Click Save to create the field.

Creating Relationships

Typically, a Sugar module has relationships with other Sugar modules. For example, Accounts is related to Contacts, Leads, Opportunities, and several other modules. Related records from these modules display in fields or sub-panels on an account's detail page. You cannot edit these pre-defined relationships.

In Module Builder, you can create relationships between undeployed modules, and between undeployed modules and deployed modules. If you want to change a relationship after you have deployed the module, you can redefine or delete the relationship and then re-deploy the module package.

In Studio, you can create relationships only between deployed modules. After you

deploy a relationship in Studio, you cannot change it.

You create one relationship at a time from the Relationship Editor. When you create a relationship for a module, it is considered to be the primary module and the module that you relate it with is the related module. Depending on the relationship type, the relationship is expressed with sub-panels and related-to fields. When you create a new relationship between two modules, the system automatically creates the necessary sub-panels, related-to fields, and metadata relationships.

Note:	It is recommended that you use a Relate field to create a one-way relationship between modules. To create a two-way relationship between modules, use the Relationship Editor.

You can also create a relationship between a module and itself. In this case, the relationship becomes a parent-child relationship. For example, you can create a relationship from Accounts to Accounts in order to create sub-accounts within the primary account.

In Module Builder, you can select Activities as the related module but not its sub-modules such as Tasks, Calls, and Meetings. The relationship is automatically reflected in these sub-modules.

In Studio, you can select a sub-module of Activities when you create a relationship. So, when you select Activities as a related module in the Module Builder, you can use Studio to define the relationship further for its sub-modules.

Relationship types

The relationship types are as follows:

One-to-one: Records in the primary module and the related module are uniquely related to each other. For example, an account can be associated with only one contact and a contact can be associated with only one account. This account value will display in the contact's Detail View, and the contact value will display on the account's Detail View.

One-to-many: A record in the primary module can have relationships with many records in the related module. For example, an account can be associated with many contacts, and many contacts can be associated with the same account. The Detail View of the primary module will display a sub-panel for the related module, and the Detail View of the related module will display a Related-to field containing

a link to the related record.

Many-to-one: Records in the primary module can have a relationship with one record in the related module. For example, an account can be associated with one contact. The Detail View of the primary module will display a field for the related module from which you can select a record, and the Detail View of the related module will show a sub-panel for the primary module from which you can create or select records.

Many-to-many: In this relationship, records in both the primary module and the related module can have relationships with multiple records in each module. For example, an account can be associated with many bugs, and a bug can be associated with many accounts. The Accounts Detail View will display a Bugs sub-panel. Similarly, the Bugs Detail View will display an Accounts sub-panel.

The type of relationship that you can create depends on your choice of primary and related modules. This is because only a module with sub-panels can have a one-to-many or a many-to-many relationship with another module. A sub-panel is needed to show all the related records from the other module.

For example, with Accounts as the primary module and Knowledge Base as the related module, you can create only a one-to-one relationship between them. This is because Knowledge Base lacks a sub-panel. Therefore, Accounts cannot display related records from Knowledge Base. However, if Knowledge Base is the primary module and Accounts is the related module, you can create a one-to-many relationship between them because Accounts has sub-panels and, therefore, Knowledge Base can display related records from Accounts.

If you are creating a relationship between a custom module and a Sugar module, then you can choose any relationship type because all custom module types include at least one sub-panel.

Sub-panel types

Sugar provides many sub-panel types for your use. When you create a relationship that involves sub-panels, Sugar displays all sub-panel types available for that module for your selection. A sub-panel can display different sets of fields depending on the primary module to which it is related. For example, there are several types of sub-panels for Contacts. The Contacts sub-panel that appears under Accounts contains different fields than the Contacts sub-panel that appears under Cases.

The Default type of sub-panel contains the most commonly used fields in the module. Every module has a Default type that contains a set of fields to display as a sub-panel. Select Default if you want to display the most commonly used fields in

the sub-panel in the relationship that you create.

For example, if you create a one-to-many relationship between Calls and Accounts, you can select a sub-panel type for the Accounts sub-panel in the Calls Detail View. To use a sub-panel consisting of the most commonly used fields from Accounts, select the Default sub-panel type; to use the Accounts sub-panel from the email's Detail View, select ForEmails.

You can create relationships in Module Builder as well as in Studio. However, there are some differences, which are noted in the table below:

Relationship in Module Builder	Relationships in Studio
You can create relationships with other Sugar modules as well as other modules within any undeployed package.	In Studio, you can create relationships only between deployed modules.
If you want to change a relationship after you have deployed the module, you can redefine or delete the relationship and then re-deploy the module package.	You can delete a relationship after you deploy it, but you cannot redefine it.
You can select Activities as the related module but not its sub-modules such as Tasks, Calls, and Meetings. But the relationship is automatically reflected in these sub-modules.	You can select a sub-module of Activities when you create a relationship. So, when you select Activities as a related module in the Module Builder, you can use Studio to further define the relationship for its sub-modules.

To create a relationship in Module Builder

1.	Click the custom module to view its details.

2.	Click View Relationships.

Sugar displays existing relationships, if any, on the page.

3.	Click Add Relationship.

4.	To localize the relationship label, select the language pack from the Language drop-down list.

5.	Select the relationship from the Type drop-down list.

If you select a One-to-One relationship, you can choose a related module. Sugar

displays the related module as a field in the primary module, and the primary module as a field in the related module.

If you select a One-to-Many relationship, you can select a related module. Sugar displays sub-panels of the related modules in the Detail View of the primary module. The sub-panel options vary depending on the related module that you select.

If you select a Many-to-One relationship, you can select a related module. Sugar displays a the primary module as a sub-panel in the Detail View of the related module.

If you select a Many-to-Many relationship, you can select sub-panels for the primary module as well as the related module.

6.	From Related Module drop-down list, select the module you want to relate to the primary module.

7.	From the Subpanel field for the related module, select the sub-panel type that you want displayed on the detail page of the primary module.

8.	From the Subpanel field for the primary module, select the sub-panel that you want displayed on the detail page of the related module.

9.	Click Save to create the relationship.

The new relationship displays under the Add Relationship button in the middle panel. Sugar appends it with an asterisk to denote a custom relationship.

To create a relationship in Studio

1.	Select the module in Studio and click Relationships.

Sugar displays a list of existing relationships for the primary module on the page.

2.	To create a relationship, click Add Relationship.

The Relationship Editor displays on the page.

3.	Follow the process described in To create a relationship in Module Builder.

To manage a relationship

1.	To edit a relationship, in Module Builder, click its name in the Relationships list and make the necessary changes in the Edit Relationship tab and save it.

You cannot edit or delete relationships in Studio.

2.	To delete a relationship, click Delete.

History Subpanel

By default, the History subpanel of account record will include emails associated with any of the account's related contacts. This functionality provides a fuller view of the interactions related to the current account record. The same functionality is also available on the Cases and Opportunities modules with it being enabled for cases by default in addition the Accounts module. The History Subpanel administration section allows administrators to enable or disable the inclusion of related contact records' emails for the Accounts, Cases, and Opportunities modules.

To enable or disable a module to include related contacts' emails in its History subpanel, follow these steps:

1. Navigate to Admin > History Subpanel.
2. To enable a module to include related contacts' emails in its History subpanel, click to check the corresponding box. To disable a module, click to uncheck the corresponding box
3. Click Save.

Rename Modules

Rename Tabs is now labeled Rename Modules. With this feature, module names are displayed in singular and plural form, depending on their use. For example, if the module name is Contact (for singular) and Contacts (for plural), the module tab is displayed as Contacts and options in the Actions bar display as Create Contact, View Contacts, and so on. This also applies to every instance of the module name across the system.

You can also change the names of the modules appearing within the application using singular and plural labels for the module names. For example, Contact can be modified to Person and Contacts can be modified to People.

To rename modules

| 1. | In Developer Tools, click Rename Modules link. |
This displays the Administration Rename Modules page.

| 2. | Click the Edit icon located next to the module name. |
This displays the Singular Label and Plural Label fields.

| 3. | Input the information in the fields to define the singular and plural names of the module. |

| 4. | Click Save. |

Display Module Tabs and Subpanels

This option enables you to hide or display selected module tabs and sub-panels from users and reorder them as needed.

When you hide a module tab from users, it is not visible to the users when they log into Sugar. However, if the hidden module is related to a module that is visible to users, it displays as a sub-panel in the Detail View of the related module. So users can still access related records of the hidden module from the Detail View of the related module.

Note: Use roles to block users completely from accessing a module. For more information, see Role Management.

When you hide a sub-panel, users cannot view related records from the Detail View of a related module.

You can allow users to configure tabs for modules that they can access from their User Preferences page. This will enable users to override the global settings that you set with this option.

By default, the following modules are hidden:

- Projects
- Bug Tracker

Note: You cannot hide the Home tab.

Follow the steps listed below to configure module tabs and subpanels:

1. Go to Developer Tools and select Display Module Tabs and Subpanels. This displays all the module tabs and sub-panels on the Select Module Tabs and Subpanels page.
2. To hide a module, drag it from the Displayed Tabs column and drop it in the Hidden Tabs column; to display a module, drag it from the Hidden Tabs column and drop it in the Displayed Tabs column.
3. To rearrange the display order of a tab, drag and drop it into the desired position.
4. To prevent users from configuring module tabs, deselect the Allow users to configure tabs option.
5. To hide a sub-panel, drag it from the Displayed Subpanels column and drop it into the Hide Subpanels column. To display a sub-panel, drag it from the Hidden Subpanels column and drop it in the Displayed Subpanels column.
6. Click Save to save the configuration; click Cancel to exit the page without saving your changes.

Configure Shortcut Bar

Use this option to select the modules for which Quick Create forms would be available on the Shortcut bar. By default, Cases, Bug Tracker, Documents, and Targets are disabled, hence icons for these modules do not display in the Shortcuts bar.

To enable or disable Quick Create forms for a module

| 1. | To enable the Quick Create form for a module, select the module from the Disabled Modules list and drag it to the |

To disable the Quick Create form for a module, select the module from the Active Modules list and drag it to the Disabled Modules list.

| 2. | Click Save to update the settings. |

Configuring Grouped Modules

You can use the Configure Grouped Modules feature to organize modules within groups. Users can select these groups to view the modules within those groups. For example, you can group the Contacts, Leads, and Opportunities modules under

a Sales group, and the Cases, Bug Tracker, and Products modules under a Support group. Users can then select either the Sales group or the Support group to view the corresponding set of modules.

You can add the same module to multiple groups. For example, Contacts can be part of the Sales group as well as the Marketing group.

The system provides following group tabs:

•	Sales

•	Marketing

•	Support

•	Activities

•	Collaboration

You can change the labels for any of these tabs and also add new groups, if needed.

Users have the ability to change the configuration to grouped modules or ungrouped modules from their User Preferences page.

To configure and manage grouped modules

1.	In Developer Tools, click Configure Grouped Modules.

Sugar displays the default groups on the Configure Grouped Modules page. The associated modules are listed below each group tab.:

2.	To edit the name of a group tab, click the Edit icon, located beneath the group name, and enter the new name in the text field; click Save.

Sugar displays the new group name.

3.	To remove a module tab from a group tab, place the cursor on the name and drag it to the Remove Module from Group bucket on the left.

The module no longer displays under the group tab.

4.	To add a module to a group tab, select it from the Modules list on the left, drag and drop it into the Group list, just below the Edit and Delete icons.

Under a group tab, you can rearrange the order of the module tabs by selecting a tab name and dragging it to a different location in the list.

5.	To save your changes and make them available for users, click Save & Deploy.

To add a new group tab

1.	Click Add Group.

This displays the New Group page.

2.	To name the new group tab, click the Edit icon, enter the name in the text field, and click Save.

3.	To add a module tab under the new group tab, select it from the Modules list and drop it in the group, below the Edit and Delete icons.

4.	To save your changes and make it available for users in the Sugar User Interface, click Save & Deploy.

Dropdown Editor

Most modules display at least one drop-down field containing a list of values from which users can choose. For example, when users create an account, they can choose a specific industry type and an account type in the respective drop-down fields.

As the administrator, you can use the Dropdown Editor to create new drop-down lists, and to edit values of a drop-down list to suit your organization's needs. When you create a new drop-down field in Studio, you must associate it with an existing drop-down list.

Note:	You cannot use a custom Stage

	drop-down list when you create a quote.

To create a drop-down list

1.	Scroll down to the Developer Tools section on the Administration home page, and select Dropdown Editor. Alternatively, on the Studio home page, click the Dropdown Editor tab located at the bottom of the page.

Sugar displays the Dropdown Editor page, which contains existing drop-down lists.

Note:	You can also add a drop-down list in the process of creating a custom field with the DropDown data type in Studio.

2.	Click Add Dropdown.

Sugar displays fields to add a new drop-down listin the Edit drop-down tab.
The Name field displays the name that you specified. The system automatically appends _list to the drop-down name to identify the data type in the database. You can use your own data type naming convention if needed.

3.	From the Language drop-down list, select a pre-installed language pack of your choice.

4.	In the ItemName field, enter a name for the item.

5.	This is the name that is saved in the Sugar database.

6.	In the DisplayLabel field, enter a label name for the item.

This is the label that displays to users.

7.	Click Add.

The name of the item displays above the Item Name field. This is the name that displays in the User Interface. To add additional items, click Add and repeat the process.

8.	To display the items in ascending order, click Sort Ascending; to display them in

	descending order, click Sort Descending

9.	Click Save to save the drop-down list.

The list displays in the dropdown list on the Edit Field tab of a module.
To edit an existing drop-down list

1.	Select an existing drop-down field from the Dropdown Editor.

2.	To change an item's display label, click the corresponding Edit icon and enter the new label.

3.	To remove an item, click the corresponding Delete icon.

4.	To add a new item, enter the item name and display label in the fields below; to add additional items, click Add and enter values for the next item.

5.	Click Save to save your changes; to undo your changes, click Undo; to redo your changes, click Redo.

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Bug Tracker

Overview

This section provides the Releases option that enables you to maintain a list of releases for your product. This list will be available in the Release drop-down box that is displayed when reporting a new bug in the Bug Tracker module.

Creating a Release

1.	On the Administration Home page, select Releases from the Bug Tracker

	sub-panel.

2.	On the Releases Home page, click Create.

3.	In the Release sub-panel that displays below the list, enter information for the following fields:

Release Version. Enter the version number of the release.
Status. From the drop-down list, select Active to display the name in the Release drop-down list.
Order. Enter a number to specify the order in which the release is displayed in the drop-down list.

4.	To add the release to the list, click Save

5.	To add another release to the list, click

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Employee Records

Overview

As an administrator, you can create and manage employee records. When you create an employee record, it is automatically added to the Employees list as well as the Users list. Similarly, when you delete an employee, the associated user record is also deleted.

Creating Employee records

1. Log into Sugar as an administrator.
2. Click the Employees link located at the top right-hand corner of the page.
3. Select Create Employee from the Actions bar on the Employees tab.
4. Enter the following information in the Create (Employees) page:

   First Name. Enter the employee's first name.
   Last Name. Enter the employee's last name.
   Employee Status. From the drop-down list, select one of the following status options:

- Active: Select this option to specify a current employee of your organization.
      - Terminated: Select this option if the employee is no longer working for your organization.
      - Leave of Absence: Select this option if the employee is going to be absent from work for an extended period of time.
    Title. Enter the employee's official title.
    Department. Enter the name of the department to which the employee belongs.
    Reportsto. Enter the name of the employee's supervisor.
    OfficePhone. Enter the employee's office phone number.
    Mobile. Enter the employee's cell phone number.
    Other. Enter an alternative phone number for the employee, if any.
    Fax. Enter the fax number for the employee.
    Email. Enter the email address for the employee.
    Home Phone. Enter the home phone number for the employee.
    Other Email. Enter an alternative email address for the employee, if any.
    IM Type. From the drop-down list, select the type of Instant Messenger service that the employee has.
    IM Name. Enter the employee's user name for the IM service.
    Notes. Enter any comments concerning the employee.
    Primary Address. Enter the employee's primary address.
    City. Enter the name of the city.
    State. Enter the name of the State.
    Postal Code. Enter the zip code of the address.
    Country. Enter the name of the country.
5. Click Save.
   You can now view the record in the Employees List View and Users List View pages.

Managing Employee records

- To edit an Employee's record, open the record, and click Edit. Update the information as needed, and click Save.
- To delete an employee, open the record, and click Delete.
- To search for an employee, use the Search sub-panel located above the Employees list.
- To view an employee's details such as the title and contact information, click the employee name in the List View.
- To email an employee, click the user's email address in the List View.
- To export employee records, select them from the list, click Export and follow the process detailed in Exporting Data.
- To edit the status of multiple employees, use the Mass Update panel as

described in Editing and Deleting Multiple Records.
- To duplicate a record, click Duplicate on the Employee's Detail View page, modify the information if needed, and click Save. Duplication is a convenient way of creating a new employee. You can change the information in the duplicate record to create the new employee.
- To go back to the Employees List View page from a Detail View page, select the Employees tab.

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Advanced Configuration Options

Overview

Advanced Configuration options enable you to exercise tighter control over user actions in your Sugar instances.

Locking Down Upgrade Wizard, Module Builder, and Backups

If you are managing multiple instances of the Sugar application, you can maintain complete control over the Sugar instances by preventing users with administrative privileges from making any changes. To do this, you can lock down the Upgrade Wizard, Module Builder, and Backups.

To lock down the Upgrade Wizard, Module Builder, and Backups

1.	Navigate to the config.php file in the Sugar root directory.

2.	Set the following parameter as shown below:

$sugar_config['admin_access_control']=true

3.	Save the file.

Restricting the Module Loader

To ensure that users with administrative privileges do not load sub-standard

modules into Sugar, you can restrict the Module Loader to a specific directory that you control. This allows you to check modules before they are loaded into Sugar.

To restrict the Module Loader

1.	Navigate to the config.php file in the Sugar root directory.

2.	Set the following parameters as shown below:

$use_common_ml_dir=true
$common_ml_dir='ml directory'
where ml directory is the name of the directory from which module will be loaded into Sugar.

3.	Save the file.

Limiting System Resources

By default, Sugar terminates any request or post that runs more than 1000 queries. For reports,export, import, administration, and synchronization, the maximum number of queries allowed is 50,000 per request. This prevents user-initiated processes from taking up too many system resources. You can change these settings as desired in the config.php file.

Configuring Default Permissions for Sugar Files on Linux

If you are running Sugar on Linux platform, you can control ownership and accessibility to all Sugar files and folders by configuring default user and group permissions.

The following is an example of setting Read, Write, and Execute permissions for the Apache user and the Apache group on Centos operating system:

'default_permissions' => array(
'dir_mode' => 02770,
'file_mode' => 0660,
'chown' => 'apache',
'chgrp' => 'apache',),

For dir_mode, you may see a value of 1528, which is the decimal equivalent of the

octal value 02770. For file_mode you may see a value of 432 which is the decimal equivalent of octal value 0660.

Cache upload enhancements

Changing upload directory

To enhance performance of the Reports module, you can configure a slave database to share the load with the master Sugar database.

The upload directory is set by the upload_dir configuration variable. The default value is upload/, which is the upload directory inside the Sugar installation directory. You can set it to any path in the filesystem by putting the absolute path of the new upload directory into this variable.

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 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. Administrators can move the cache directory to a location outside the Sugar install directory to ensure space availability. The location of the cache directory is stored in the configuration variable cache_dir and the default value is cache/ - i.e. cache directory inside the Sugar installation directory. It can be set to the absolute filesystem path of the new cache directory.

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 SugarCRM 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 filesystem directories, refer to your webserver documentation.

The cache directory should be writable by the user running the webserver.

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