Sugar Corporate 6.7 Application Guide

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The Sugar Application Guide introduces you to some basic CRM concepts and helps you get familiar with the Sugar system. It describes how to access Sugar through a personal computer and a web browser. It also describes how to perform a broad range of customer relationship management tasks and related administration tasks.

Readers are not required to have any programming or software development knowledge, but should be generally familiar with the use of a personal computer and a web browser such as Mozilla Firefox.

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Introduction

Overview

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

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

Core Features

Sales Force Automation

- [Target](#), [Lead](#), and [Contact](#) management to direct and organize efforts throughout the sales life cycle
- [Account](#) management to aggregate interactions with organizations and individuals
- [Opportunity](#) management to pursue new business, share sales information,

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

Marketing Automation

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

Customer Support

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

Record Keeping

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

Collaboration

- Shared [Email](#) and [Calendar](#) to provide visibility across individuals and teams
- [Connectors](#) and tools to leverage third-party information regarding your prospects and clients
- [Project](#) management to track the progress of multipart initiatives

Reporting

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

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Getting Started

Overview

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

Accessing Sugar
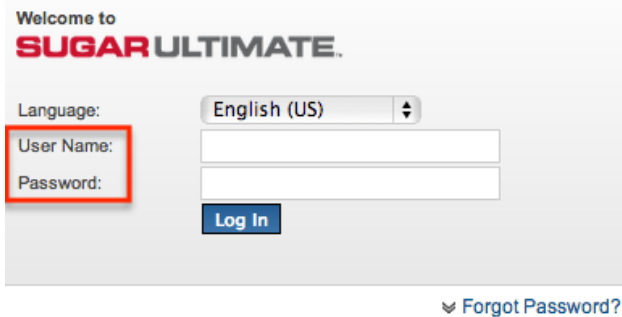
Prerequisites

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

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

Logging In

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

Welcome to
SUGAR ULTIMATE.

Language:	English (US)
User Name:	
Password:	

Log In

≈ Forgot Password?

Resetting Your Password

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

Use the following steps to reset your password:

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

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

3. The reset password email will be sent to your primary email address. Click the link in the email to reset your password.
4. Enter your username, new password, and new password again. Click "Log In" to access your account with the new password.

Note: You may also change your password while logged in to Sugar by navigating to the [Password tab](#) in your user preferences.

Setting Your Language

The Language dropdown list on the login dialog box allows users to select the primary language they want displayed in Sugar. The out-of-the-box default language is English (US), but administrators can change the default language globally via Admin > Locale. For more information on configuring the default language in Sugar, please refer to the [User Interface](#) section of the System documentation. Once the default language is changed by the administrator, it will display as the default selection on the login screen for all users.

Please note that you will need to select the specific language you want displayed each time you log in or the default language will display in Sugar. Administrators can also control what languages are available to select in the Language dropdown

list via Admin > Languages. If you do not see one of the listed languages below displayed in the Language dropdown list, please reach out to your system administrator for assistance. For more information on managing languages in Sugar, please refer to the [Languages](#) section of the System documentation.
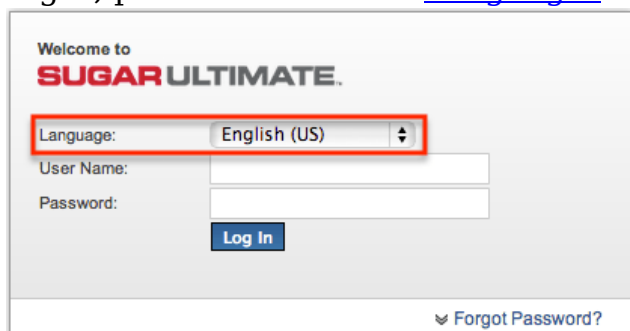
The following languages are available for use in Sugar:

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

Logging Out

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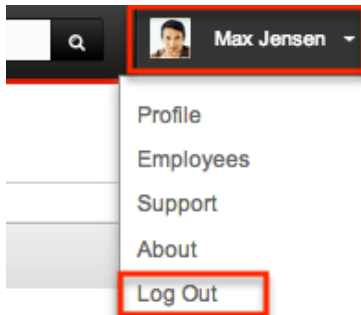
Automatic Log Outs

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

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

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

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

New User Wizard

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

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

Configuring Your Information

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

The following options are available to configure your user profile:

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

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

Configuring Your Locale

The Your Locale step allows you to configure the date, time, currency, and name format you want displayed in Sugar based on your current geographical location. Please note that the information provided on this page can be updated in your user preferences at a later time if desired.

The following options are available to configure your locale settings:

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

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

Configuring Your Email Account

The Your Email Account step will appear in the wizard if the system email settings are configured via Admin > Email Settings, but the administrator has not allowed users to use the system mail account to send their own outbound emails. Your personal mail account information (username, password) should be entered in order to send outbound emails from Sugar. The email provider for the default outbound mail server will be displayed on the page. Once your mail account information is entered, you can send a test email to confirm that the information is correct. Click "Send Test Email", provide an email address where the test email should be sent, then click "Send". If you do not receive the test email, double check and re-enter the email account information to test again .For more information on setting up your user preferences' email settings, please refer to the Email Settings section of this documentation. Please note that you can change your personal email setting in your user preferences at a later time if desired.

Once you click "Next", the following page will confirm that you are ready to use Sugar and allows you to access various support resources (e.g. Documentation, Knowledge Base, etc.) if you wish. Please note that you can click "Finish" to go directly into your Sugar account.

User Preferences

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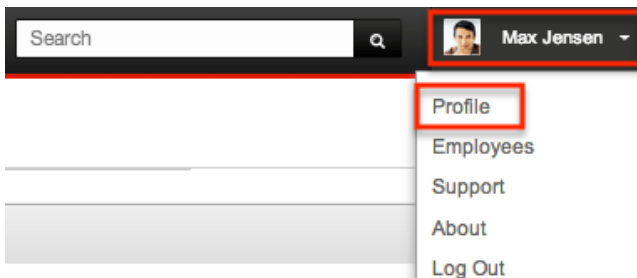
User Profile Tab

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

User Profile

The User Profile section displays your Sugar user name, full name, status, user

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

Employee Information

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

If you do not wish to have your employee information displayed in the Employees directory in Sugar, uncheck the "Display Employee Record" box. For more information on viewing the employee directory, please refer to the [Employees](#) documentation.

Email Settings

The Email Settings section is where users can configure their personal email settings. Administrator's can also set up the users email setting when adding the user in the system. Please note that the email settings must be configured in user preferences prior to sending outbound emails from Sugar. In addition, the outbound mail server for the system must also be configured by the system administrator via Admin > Email Settings. For more information on setting up the system email settings, please refer to the Emails documentation in the Administration guide.
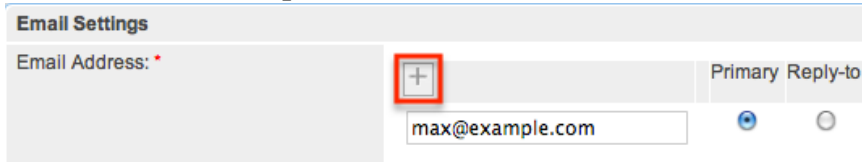
Users will enter in their primary email address where password reset emails, system-generated notifications, etc. will be sent. Multiple email addresses can be added in email settings, but only one will be marked "Primary". The primary email address will be displayed when sending outbound emails in Sugar and automatic notifications from Sugar will be sent to this address as well. Users will be able to send outbound email's automatically from Sugar if the administrator has enabled user's to use the system mail account configured in Admin > Email Settings. If this option is not enabled, the SMTP Username and Password fields will appear in the Email Settings section for the user to enter their personal credentials corresponding to their mail account on the company's defined mail server. The user will need to enter these credentials in order to send emails using the system's outbound mail server.

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

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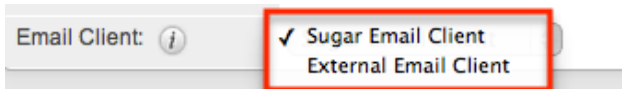
preferences:

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

2. The email client will be defaulted to "Sugar Email Client", but users can choose to use an external mail client if they wish.
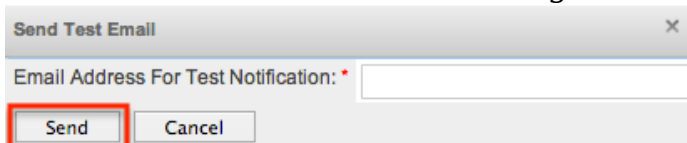
3. Enter in the SMTP Username and Password for your mail account on the company's defined mail server.
   - Note: The SMTP Username and Password field will only appear if the system administrator has not allowed users to use the system mail account to send outbound emails.

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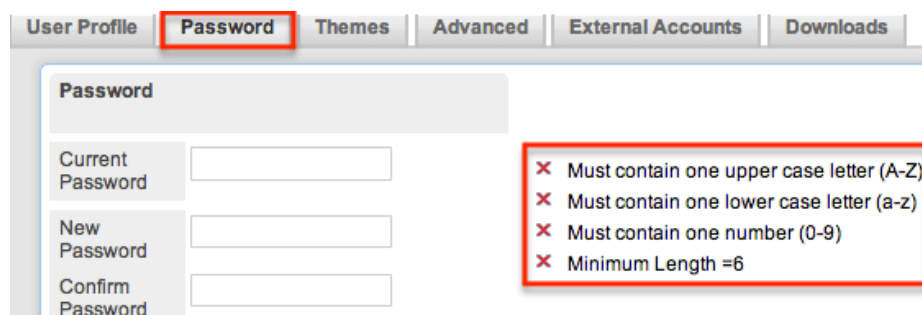
5. Click "Save" to preserve your email settings.

Password Tab

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

To reset your password, enter your current password, new password, and

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

Themes Tab

Users have the option to change the look and feel of Sugar's user interface by selecting one of the themes (e.g. Eco, Amore, etc.) available in the Themes tab. By default, the out-of-the-box theme in Sugar is " Pacific". Each theme will display Sugar's user interface with different layouts and background colors. The location of module tab's, Recently Viewed, and Actions menus may change as well depending on the theme you choose. Please note that the information displayed in Sugar will be the same regardless of the chosen theme.

Every user can have a different theme for their account based on their personal preference and how they would like to view the data in Sugar. For example, the Right to Left theme can be chosen for users with languages that are read from right to left. To change your theme, simply select the desired theme in the Themes list. Sugar provides a quick preview of each theme to the right of the list to show users how the layout will appear before committing to it. Once you have chosen your theme, click "Save" and your user interface will instantly display with the new view.
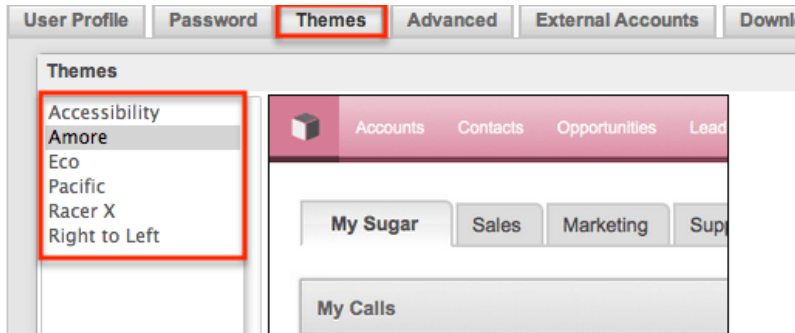
Advanced Tab

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

User Settings

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

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

- Export Delimiter : Specify the character used to delimit exported data from Sugar. By default, the comma is used to separate exported data in Sugar.
- Import/Export Character Set : Select the default character set used for data import, data export, and vCard generation. By default, UTF-8 (US or Western Europe region) is selected as the import/export character set.
  - Please be sure to select the proper character set based on your locale setting in Sugar. This will make sure that the character set between Sugar and your local machine matches when you export data, import data, or generate quote PDFs.
- Show Full Names : Check this box if you would like your full name (e.g. John Smith) instead of your assigned user name (e.g. jsmith) displayed in Sugar. If enabled, your full name will appear in the My Activity Stream dashlet, Assigned to field, and on the upper right of your Sugar account.
- Offline Client Status : Select "Active" to use the Sugar Offline Client and "Inactive" to not use it. For more information on Sugar Offline Client, please refer to the Offline Client Guide documentation.

- Default Teams : Select the default team(s) that will be automatically assigned to new records you create in Sugar.
- Notify on Assignment : Check this box to receive an email notification when a record is assigned to you by another user. Both the outbound mail server and
- Reminders : Mark the popup or email reminder checkbox to set default reminders for calls and meetings. Once marked, you can select the default reminder time (e.g. 10 minutes prior) to send reminders to invitees.
- Mail Merge : Check this box to merge data (e.g. name, address) in Sugar with mail merge templates in Word created using Sugar Plug-in for Word. Please note that the system administrator must also enable the mail merge option in Admin > System Settings in order for you to perform a mail merge. For more information on enabling mail merge in system settings, please refer to the System documentation.
- No Opportunities : Check this box if you will not be assigned opportunities in Sugar. Please note that this setting is used for forecasting. For more information on forecasting, please refer to the Forecasts documentation.
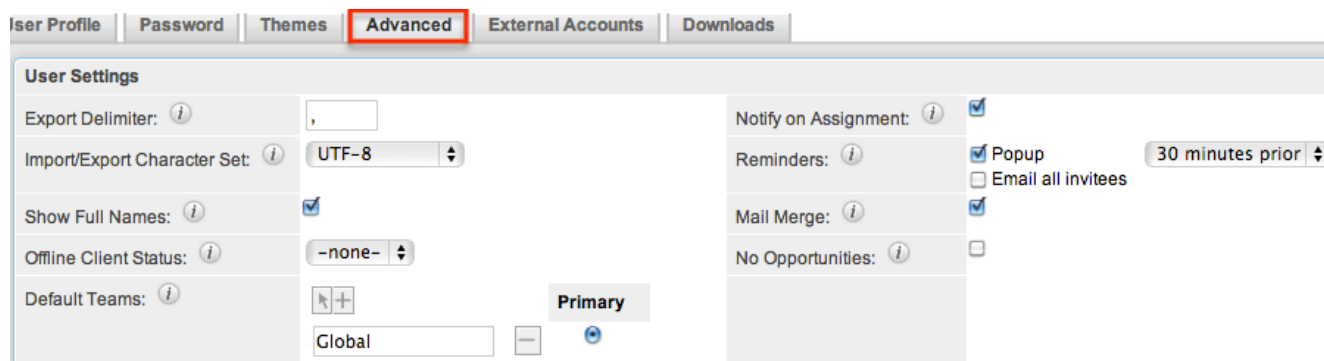
Layout Options

The Layout Options section allows users to select what modules they want displayed or hidden in the navigation bar. You can also disable the "Filter Menu By" feature for tab groupings and enable subpanels to be grouped into tabs in the Detail View layout.

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

- Module Menu Filters : This box is marked by default and allows users to view modules in the navigation bar based on specific tab groupings (e.g. Activities, Reports, etc.). The Filter Menu By option will appear under the More tab to show the different tab groupings.
- Select Modules for Navigation Bar : Select which modules will be displayed or hidden in the navigation bar by using the left and right arrow to move modules between the Display and Hide Modules column. You can also designate the order of the modules displayed in the navigation bar by

selecting the module in the Display Modules column and clicking the up and down arrow.

- Subpanel Tabs : Mark this checkbox to group subpanels into tabs in the module's detail view.
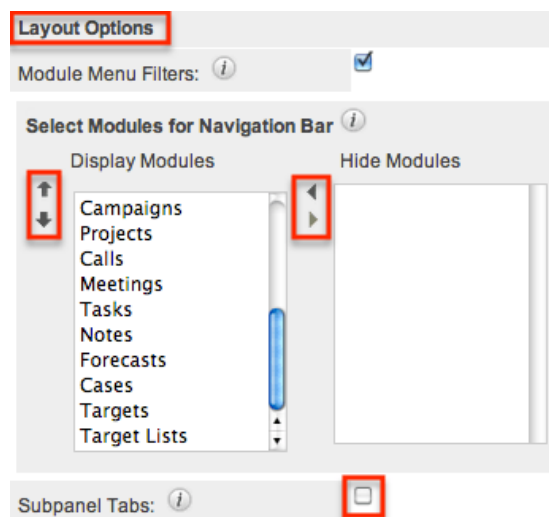
Locale Settings

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

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

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

PDF Settings

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

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

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

Calendar Options

Sugar calendars can be shared and viewed with various iCal compatible calendar applications such as Apple iCal, Google Calendar, Yahoo! Calendar, Mozilla Thunderbird, etc. The calendars are viewable as read-only in the external calendar applications and any edits to existing calendar events (e.g. meetings, calls, etc.) can only be done in Sugar. The Calendar Options section allows users to generate a unique publish key to sync their Sugar calendar to external calendar application(s). The publish key is a security feature as it prevents other user's from viewing your calendar unless they have this information. The user must have your publish key information in order to view your Sugar calendar via the external calendar application.

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

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

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

3. Copy and paste the iCal integration URL into your iCal compatible calendar application.
    - Example: Adding the URL into Apple iCal.
        1. Click "Calendar" then select "Subscribe".
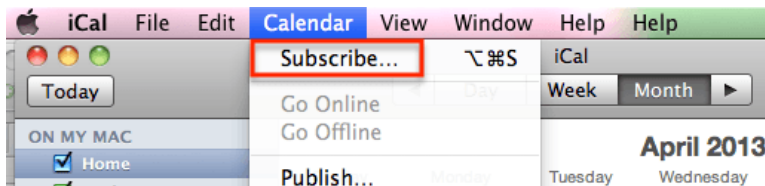
        2. Enter the iCal integration URL and click "Subscribe".
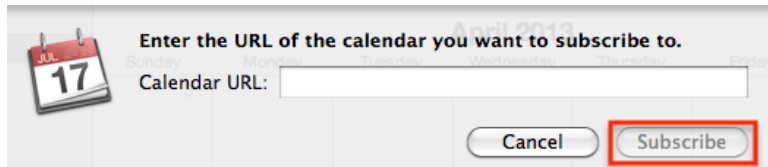
- Example: Adding the URL into Google Calendar (https://www.google.com/calendar).
    1. Click "Other Calendars" then select "Add by URL".
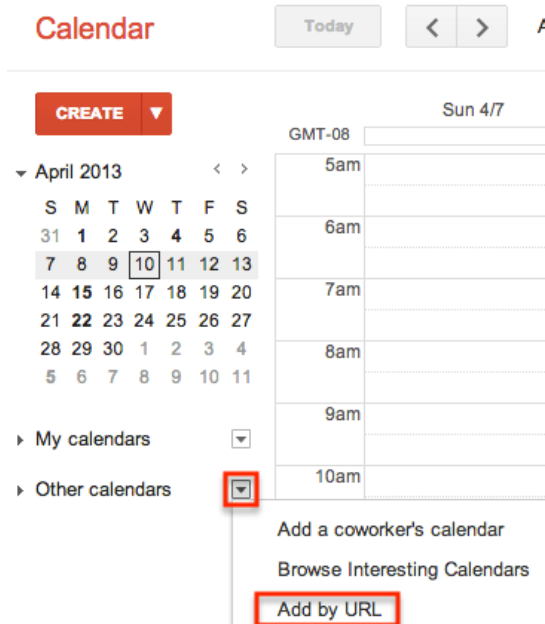
    2. Enter the iCal integration URL and click "Add Calendar".

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

1. Navigate to the Advanced tab in your user preferences and scroll to the Calendar Options section.
2. Copy the Search location URL.
3. In Outlook, go to File > Options > Calendar > Free/Busy Options.
4. In the Internet Free/Busy section, paste the Search location URL into the corresponding box.

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

the user's email address in Sugar matches the invitee email address in Outlook.

External Accounts Tab

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

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

1. Click the External Accounts tab in your user preferences then click "Create".
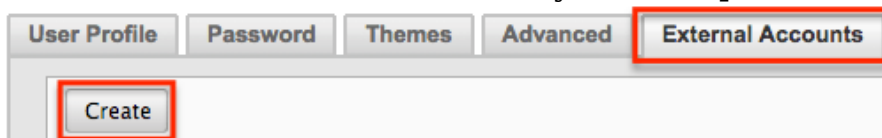
2. Select "Google" in the Application field then click the Connect button.
   - Note: If the Google option is not available to select in the Application field, the Google connector may not have been configured properly via Admin > Connectors. Please reach out to your Sugar administrator to have the Google connector configured. For more information on configuring connectors, please refer to the System documentation in the Administration Guide.
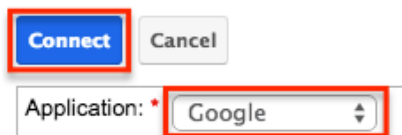
3. After clicking "Connect", a pop-up window will appear. Click "Allow" to grant permission for the connection to occur.
   - Google's login screen may appear inside the pop-up if you are not already logged in to your Google account in the active browser window. Simply enter your credentials then click "Allow" in the next window.
   - Note: Your browser's pop-up blocker must be disabled to ensure that the Google account connects successfully to Sugar.
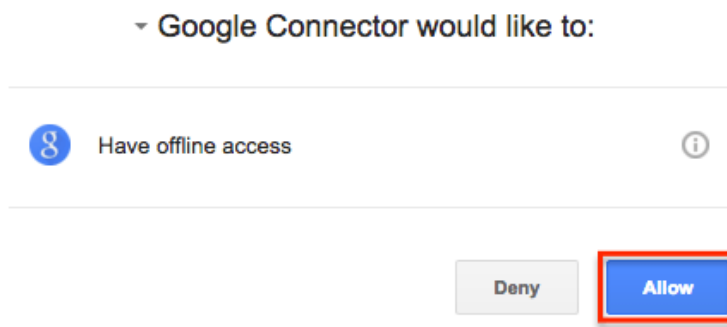
The Google application is now connected to your Sugar account and will appear under the External Accounts tab. Please note that for Google, GoToMeeting, and WebEx, you can only be connected to one account per application in Sugar.

Access Tab

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

Access Table

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

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

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

"Enabled" access when selected.

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

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

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

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

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

	Access	Access Type	Delete	Edit	Export	Import	List	Mass Update	View
Accounts	Enabled	Normal	Owner	Owner	Owner	All	All	All	All
Bug Tracker	Enabled	Normal	All	All	All	All	All	All	All
Calls	Enabled	Normal	None	Owner	Owner	All	All	All	All

Roles

Sugar Roles define permissions for users such as what kinds of records they can access and what level of access they are allowed . Roles work in conjunction withteams to form a robust security model for non-admin users in Sugar. Roles control three different layers of access for users within Sugar: module, field, and action-level access. Please note that only users who are assigned to the specific role will be able to perform actions (e.g. view, edit, delete, etc.) defined by it. For more information on the various actions and setting options for roles, please refer to the [Access Table](#) section of this documentation. Users who are notassigned to a role can access and perform actions in any module as long as they are assigned to the record or a member of the team assigned to manage it. System administrators have the ability to create various roles and assign additional roles to users via Admin > Role Management. For more information on creating and assigning roles, please refer to the [Role Management](#) documentation.

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

My Teams

Teams consist of one or more users who are assigned to manage records in Sugar. The defined permissions determine what records a user is and is not able to access. Teams are used in conjunction withroles to form a robust security model for non-admin users in Sugar. The My Teams section displays the list of teams a user is associated with, which determines what records the user has access to in Sugar. Please note that every record is assigned to at least one team, but can be assigned to multiple teams as well if different users need access to it. The default team(s) set in the User Settings section under the Advanced tabwill automatically be assigned to new records created by the user. Users assigned to the record, as well as system administrators can access the record regardless of team membership. When a user is created in Sugar, they are automatically associated to the Global team (universal team) and a Private team (users own personal team) is created by default. System administrators can assign users to additional teams via Admin > User Management or Admin > Team Management as necessary. For more information on teams as well as creating and assigning teams, please refer to

the [Team Management](#)documentation.

Downloads Tab

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

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

User Holidays

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

Resetting a User's Preferences

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

From edit view:
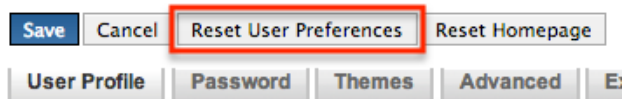
From detail view:
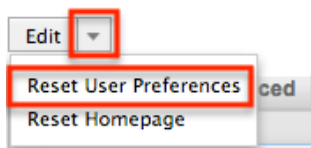
Resetting a User's Home Page

Users can reset their Home page back to the default out-of-the-box layout, which will revert all changes made to the Home page. To reset your Home page, click the "Reset Homepage" button at the top of your profile in edit view or click the Actions menu then select "Reset Homepage" in detail view.

From edit view:
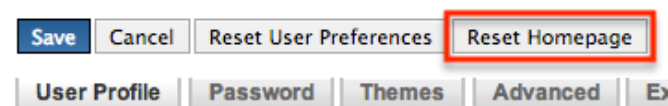
From detail view:
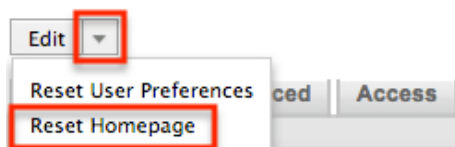
Accessing Support

The SugarCRM Support page provides access to various Sugar Support resources such as the case portal, documentation, knowledge base, training, etc. Users can

access the support page by clicking their user name on the upper right of Sugar andclicking "Support". To access Sugar's Support page outside of your instance, go directly to the SugarCRM Support page (http://support.sugarcrm.com) on your web browser.
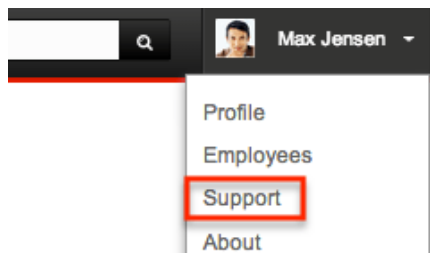
The Get Started section of the Support page provides users, administrators, and developers with the appropriate resources to get them started in configuring, customizing, and utilizing the application. The Documentation, Training, and Find Answers sections provide access to Sugar's self-help area where you can learn how to use various parts of the application via online documentations, classes, videos, knowledge base articles, etc. The Knowledge Base provides articles based on specific topics and areas of Sugar while the Documentation goes over the entire Sugar application in detail. The Resources section enables you to keep up-to-date with the latest version of Sugar. It provides key information on supported versions and platforms to ensure you are running Sugar in the best performing environment. The Customer Center section allows support authorized contacts to manage their Sugar subscription, view all purchased orders with Sugar, as well as download purchased software (e.g. Sugar Plug-in for Outlook, Sugar Plug-in for Word, etc.) for installation.

Viewing Instance Information

Users can find information regarding their version and build of Sugar by clicking their user name on the upper right of Sugar and selecting "About". For example, this will be useful if you need to confirm the current version and edition of your instance.
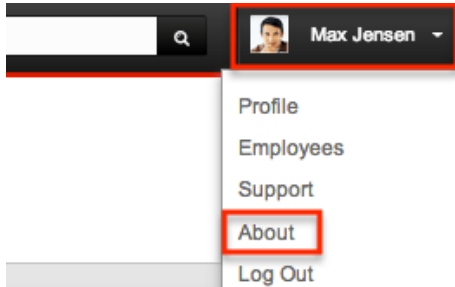
Last Modified: 03/02/2016 08:36pm

User Interface

Overview

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

Navigation Bar

All pages within Sugar display a navigation bar spanning across the top of the page. The look and functionality of the navigation bar depends on the theme being used. For the best functionality and aesthetics we recommend the Racer X Theme. The navigation bar consists of the following from left to right:

Navigation Item	Description
Home	Displayed as the Sugar Cube and will navigate back to the homepage. Also includes a recently viewed menu that spans all modules.
Module Tabs	Displays the default and any customized modules in Sugar as well as module

	specific actions, recently viewed records, and favorites.
Global Search	Search box that spans across many modules. Can utilize classic or full text searching.
Notifications	Displays a number indicating any system notifications. If there are none, this section will be empty.
User Menu	Displays as your user picture and name. Clicking pulls open a menu consisting of your Profile, Employees Module, Admin section, Support, Help, About and Logout.
Quick Create	Displays as a plus sign where clicking on it will allow the ability to quickly create a record in a specific module.
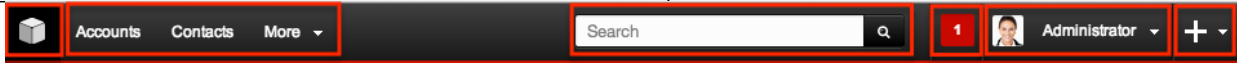
Home

Sugar will automatically take you to your homepage when logging in. As you navigate around in Sugar, you can return to your homepage by clicking on the Sugar cube icon in the top left hand corner of the navigation bar.
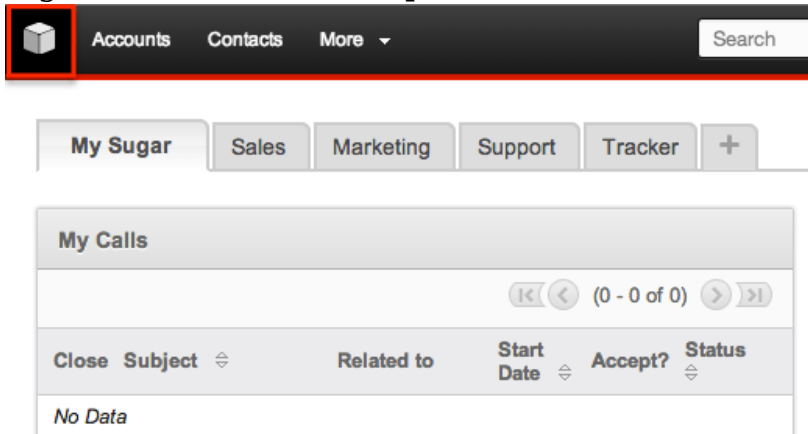
You may also hover on the Sugar cube to display the Action Menu for the homepage as well as the Recently Viewed items. The Recently Viewed menu will display the most recent ten records viewed across all modules. Each item is a link that can be clicked to take you directly to that record in its appropriate module.
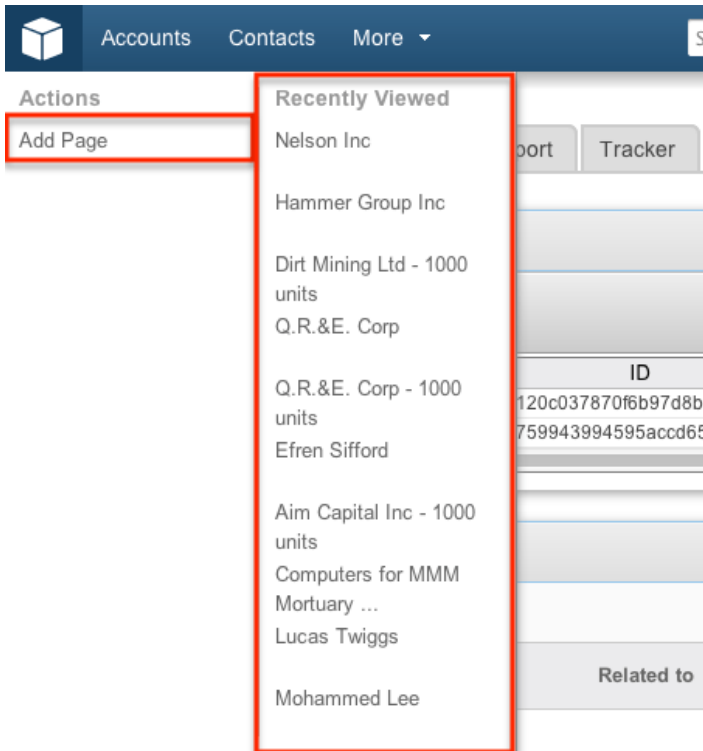
The only action available in the Action Menu for the homepage is "Add Page". This action will add a new tab group to your homepage that you can add dashlets to. For more information on how to add pages and dashlets to your homepage, please refer to the [Home](#) documentation.

Module Tabs

Directly to the right of the Sugar cube are tabs for modules within Sugar. Click the tab of a specific module to access the list view of that module. This is one of the most common methods for viewing records within a module. You may also hover on each module's tab to display the Actions, Recently Viewed, and Favorites menu for that module. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of records you last viewed in the module. The Favorites menu displays the list of records you most recently marked as favorites in the module.
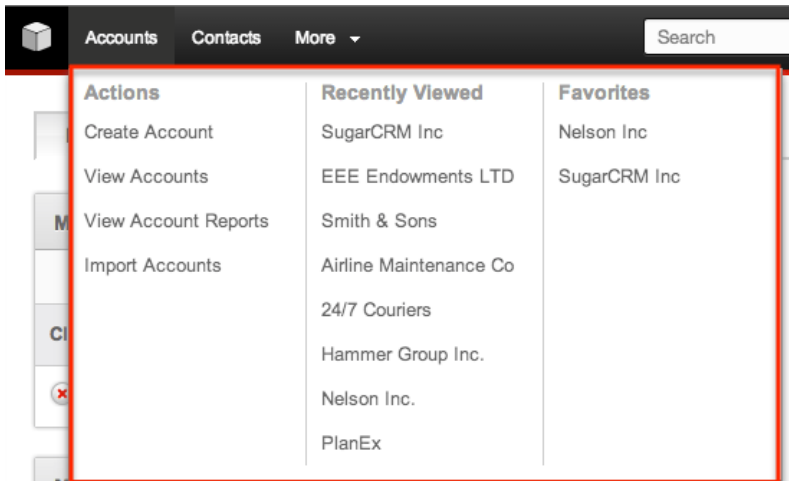
The amount of different module tabs you will see at once depends on your screen resolution and the size of your browser window. If the window is too small, Sugar will move module tabs under the More tab. Simply hover over the More tab to view additional module tabs and their associated actions, recently viewed records, and favorites.
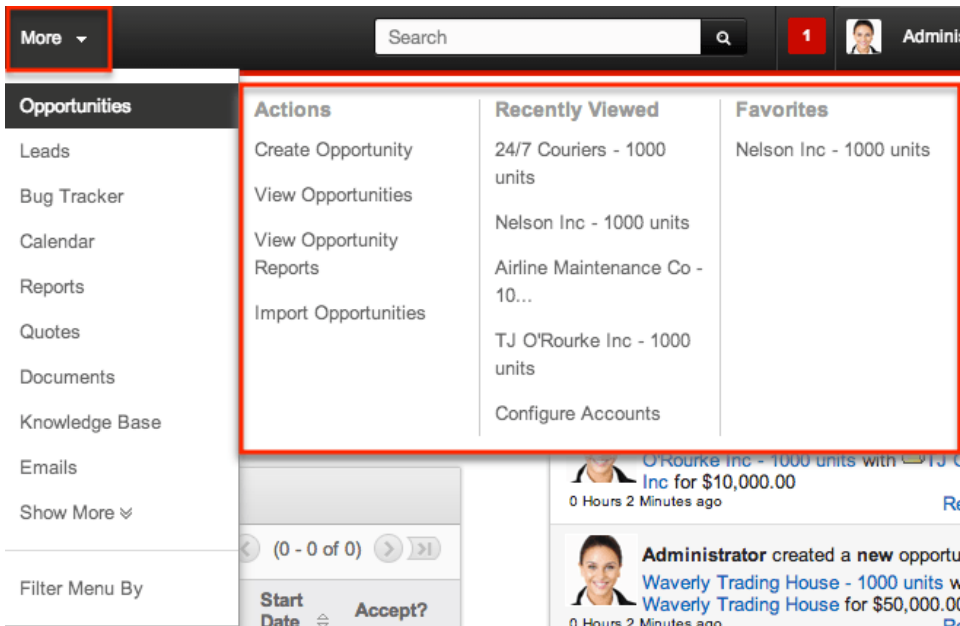
Under the More tab, you may need to click "Show More" to view all module tabs available.
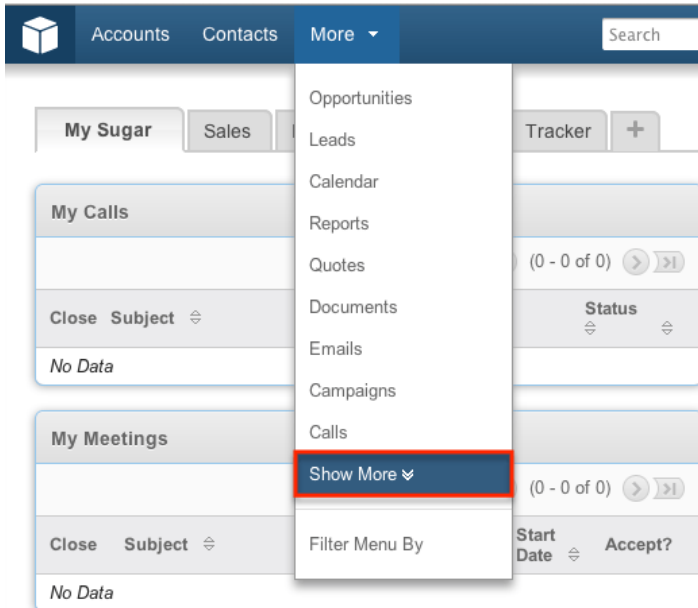
The module tab section of the navigation bar can be filtered by preset categories in order to provide easy access to the most often used module tabs. The filters are defined by default to line up with common job functions. To filter your module tabs, hover over the More tab and then the Filter Menu By option and select the filter you would like to apply.
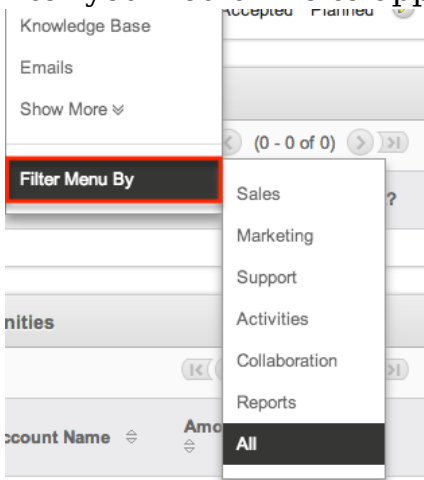
The preset filters are defined as followed:

Filter	Modules Shown	
Sales	Accounts Contacts Opportunities Leads	Quotes Forecasts Contracts* Products*
Marketing	Accounts Contacts Leads	Campaigns Targets Target Lists
Support	Accounts	Bug Tracker

	Contacts Cases	Knowledge Base
Activities	Calendar Calls Meetings	Emails Tasks Notes
Collaboration	Emails Documents	Knowledge Base Projects*
Reports	Reports	Forecasts

Sugar administrators have the ability to change the default filters and to create new ones. For more information on how to add or modify a module menu filter, please refer to the Developer Tools documentation in the Administration guide. If you do not see a specific module tab in the navigation bar, please check the following:

- The module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the module for your entire Sugar instance. Reach out to your Sugar administrator to have the module displayed. Not all modules are enabled by default when installing Sugar. The modules listed above with an asterisk (*) are hidden by default. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search may be used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar.

To use global search, you need to first enter the keyword into the search box. With Full Text Search enabled, pop-up results will begin appearing once you input three or more characters. When Full Text Search is not enabled, results starting with your keyword will appear after clicking the magnifying glass icon or hitting your Return/Enter key. For more information on using and configuring Global Search,

please refer to the [Global Search](#)section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results. For more information on configuring your Global Search, please refer to the [Search](#) documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the [Studio](#) documentation as well as the [Search](#) section of the System documentation in the Administration guide.

Notifications

The notifications indicator will display for admin users only and if there are system notifications. The notifications are typically system or configuration warnings with links to the appropriate section in Sugar to remedy the situation. Click on the notification number to open the notifications window. Click the "X" in the top right of the notification window to close out the window.
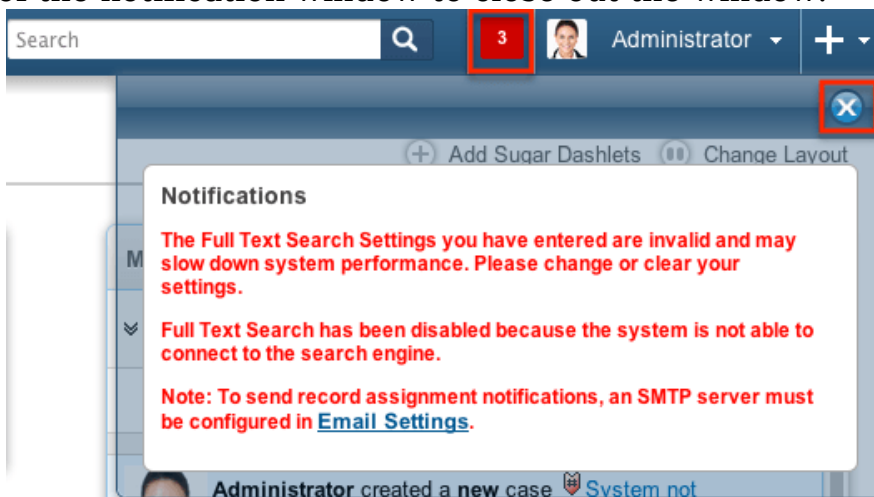
Follow instructions and links inside the notification window to remedy the warning.

User Menu

The user menu consists of your user picture and name. Clicking on this section pulls open a menu of additional operations.
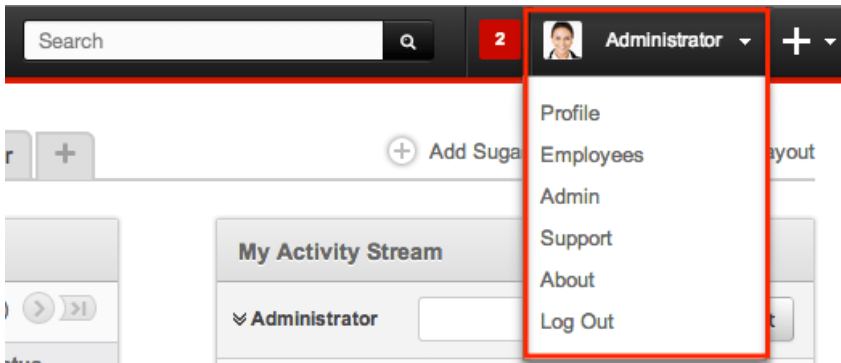
The user menu allows you to perform the following operations:

Menu Item	Description
Profile	View your user profile, change your password, and personalize aspects of Sugar
Employees	Navigates to the Employees module list view to search and view Employee records; users with administrative privileges can also create and edit employees Note: Every user is listed as an employee; however, not every employee has to be a user in Sugar.
Admin	Navigates to the Administration page to configure and customize many aspects of Sugar Note: Available only if you have administrative or developer privileges in a specific area.
Support	Opens a new window directly to support.sugarcrm.com to access Sugar documentation, knowledge base, forums, and the case portal
About	Navigates to the About page which displays the current edition, version, and build of Sugar as well as credits and source code references
Log Out	Logs the current user out of Sugar and returns you to the login page

Quick Create

The Quick Create menu allows you to easily create new records for various modules from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. Five modules are initially displayed in the menu; click "Show More" to view any additional modules enabled for this shortcut.
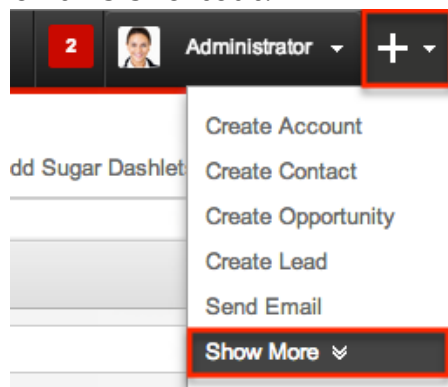
Up to ten modules may be enabled for the Quick Create menu at a time. Administrators can configure which modules are enabled in the Quick Create menu. For more information on how to add or remove modules from the Quick Create menu or to change the order of the modules in the menu, please refer to the Developer Tools documentation in the Administration guide.

Clicking on an item in the Quick Create menu will launch the quick create form for the module specified. The quick create form is a shortened version of the module's edit view and typically contains fewer fields. When using quick create to make a record while viewing an existing record of another module where there is a relationship between the two modules, Sugar automatically creates a relationship between both records. For example : if you are viewing an account record (e.g. SugarCRM Inc) and create a new contact via the quick create form, the Account Name field in the contact record will automatically populate with "SugarCRM Inc", thus creating the link between the two records. The quick create layout can be configured by administrators via Admin > Studio. For more information on configuring layouts, please re fer to the Studio documentation in the Administration guide.
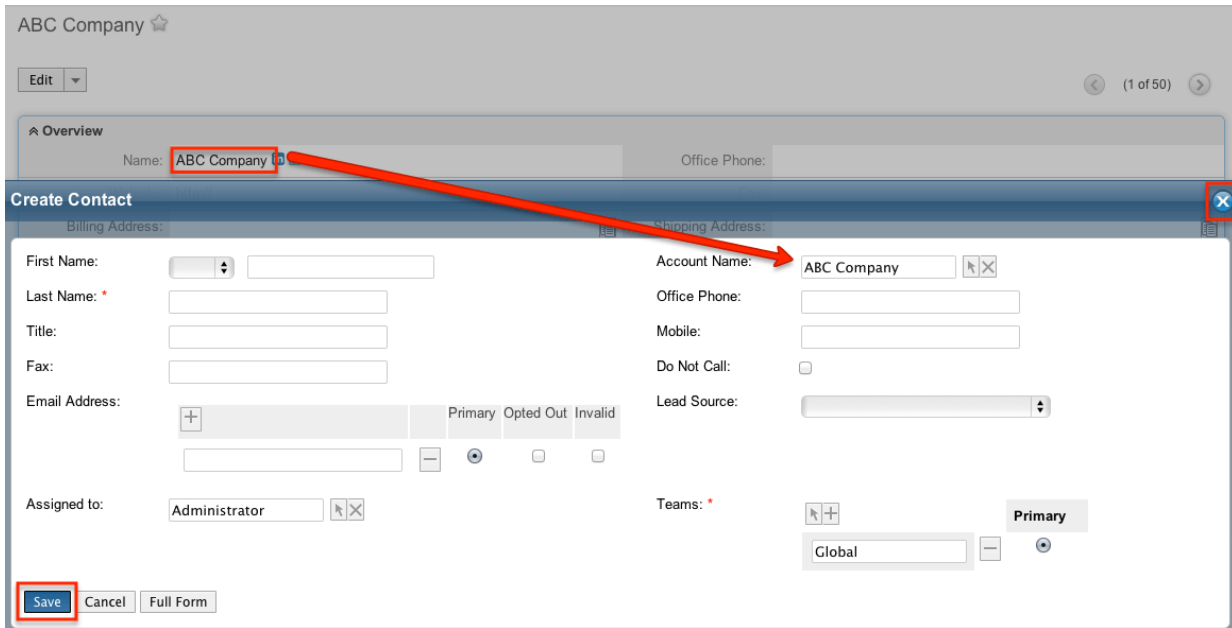
Click "Save" to complete the quick create or to abort the process click "Cancel" or the "X" in the top right hand corner. Alternatively you can click the Full Form button to navigate to the module's edit form to add more details to the record before submitting.

Footer

Sugar 6.5 introduced a collapsible footer that displays the SugarCRM logo and links to enabled third-party integrations. Widgets or integrations created by a third-party that used to be displayed as icons in the top navigation bar (formerly known as the Shortcut Bar) are now automatically displayed in the footer, after upgrading to Sugar 6.5. Icons can no longer be inserted in the top navigation bar in Sugar.
The footer consists of the following from left to right:

- Logo : An administrator can replace the SugarCRM logo with your company's logo through Admin > System Settings. For more information on how to change the logo in the footer, please refer to the System Settings documentation in the Administration guide. Hover over the logo to view the server response time for the current page load time.
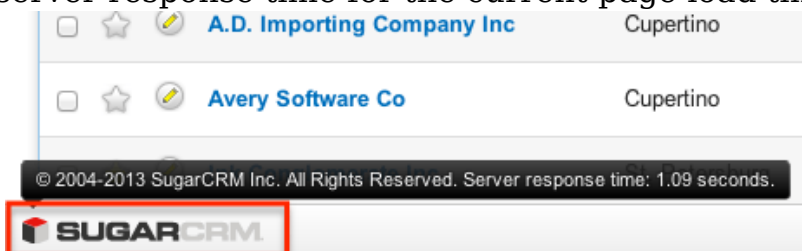
- SugarCRM Link : The middle of the Footer contains the copyright

information. This is also a link to www.sugarcrm.com

- Widgets : To the right of the SugarCRM link, any third-party widget icons will appear here.
- Tour : Launches the "What's new in Sugar" tour to display some recent additions to your version of Sugar.
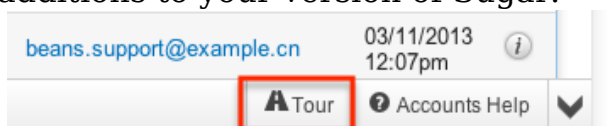
- Help : This is a context-aware link to the Application Guide. For example, if you click on the Help link in the Contacts module, you will be directed to the Contacts section of the Application Guide.
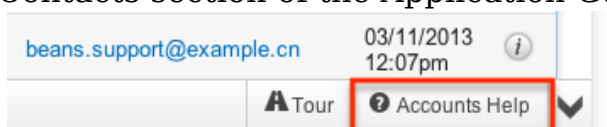
- Hide : The down arrow to the right of the footer will hide the entire footer bar.
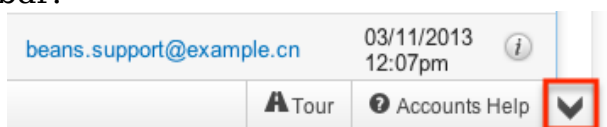
Separate from the footer bar, but located at the bottom of each page is a Print and Back to Top link. Click the Print link to open a print dialog for the current page. Click "Back to Top" to instantly return to the top of the current page.

List View

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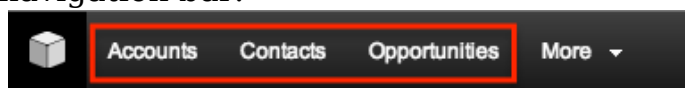
The list view displays all records meeting the current search criteria and to which your user has access. By default, Sugar sorts records in descending order of their creation date. You can view the basic details of each record within the field columns or select the record name to view it in the detail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

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

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

Basic Search

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

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

When you run a search, Sugar will return records matching all (as opposed to any)

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

Advanced Search

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

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

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

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

Selecting Records

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

- One By One : Click the checkbox next to each individual record you wish to select.
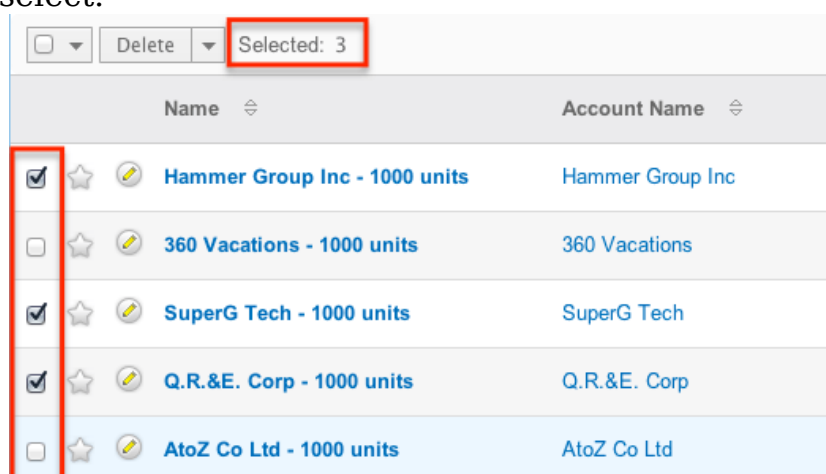
- Select This Page : Click the checkbox at the top of the list view to select all on the current page. You can also click the arrow next to the checkbox and click "Select This Page"
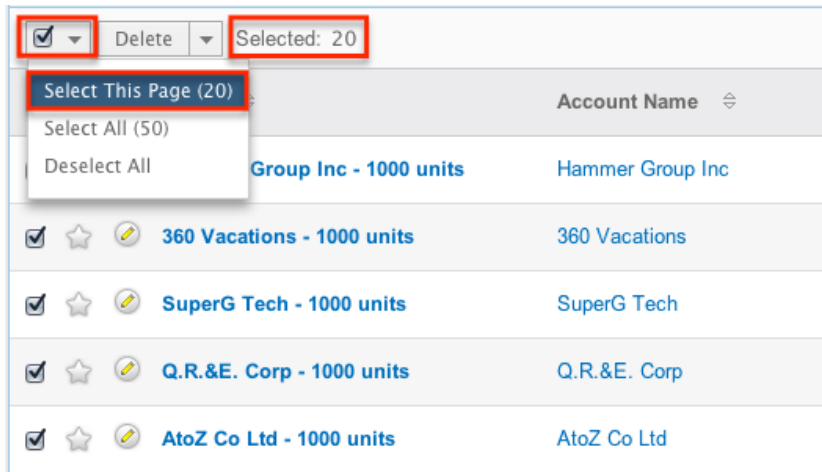
- Select All : Click the arrow next to the checkbox at the top of the list view and click "Select All"
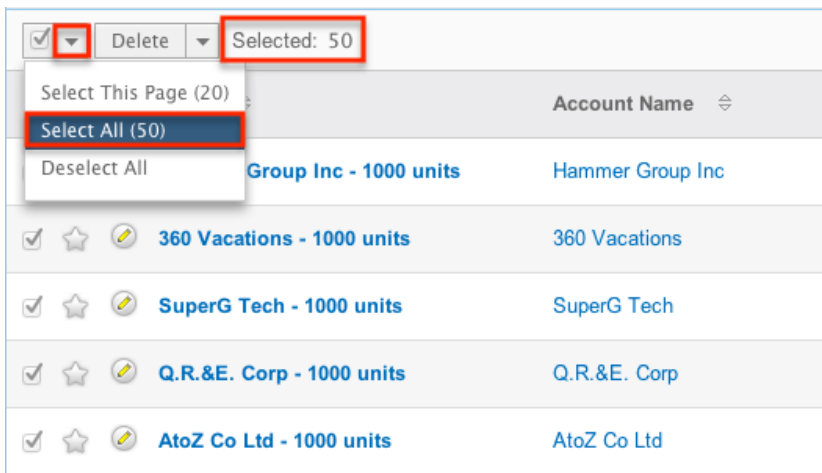
Note: When using Select All you can not unselect single records, but will have to use "Deselect All"

When selecting records you can page through all of the records and Sugar will remember which records are selected. Depending on your Sugar settings you may see the count of records being selected or you may see a plus sign (+) to refer to more records. Click the arrow next to the checkbox and click "Deselect All" to remove any selected record despite how they were initially selected.
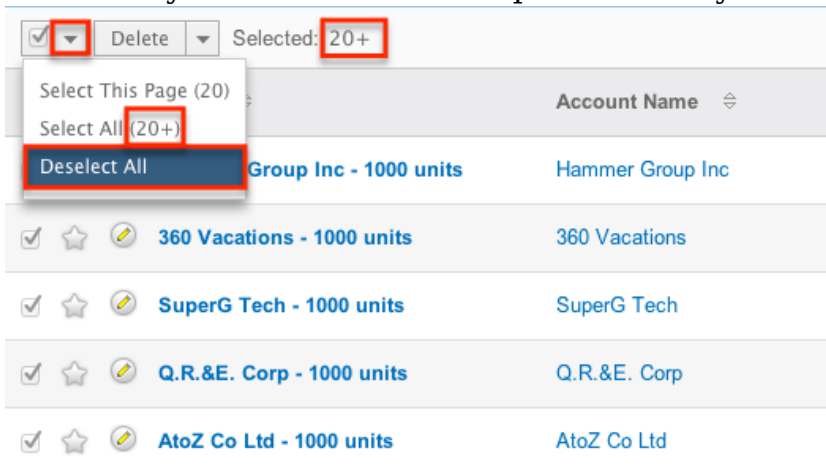
Action Menu

Once you have selected one or more records in the list view you can perform certain actions on those records. The module you are in determines the available actions. To access the action menu simply click the down arrow next to the Delete action button.
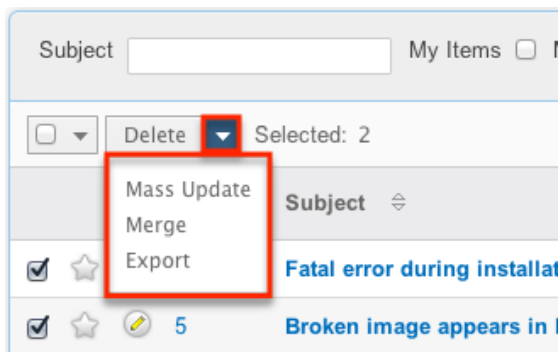
The actions menu provides possible actions such as Delete, Email, Mass Update, Mail Merge, Merge, Add to Target List, and Export for one or more records. Not all modules have all actions available. The sections below will cover the most common actions across the modules. For more information on actions available within a specific module, please refer to the list view section in the application guide pertaining to that module.

Delete Records

The list view in Sugar allows you to mass delete records easily. When deleting records in Sugar, they are not permanently deleted from the database, but are only put into a deleted status so Sugar will not see them. These records can be recovered by anyone with direct database access.
Use the following steps to delete one or more records via the list view:

1. Navigate to the list view by clicking the module tab in the navigation bar.
2. Use the Basic or Advanced Search to find the records you wish to delete.
3. Select the desired records individually or use the {{web.link("#Selecting_Records","checkbox dropdown's")}}options.
4. Choose "Delete" from the Actions menu.
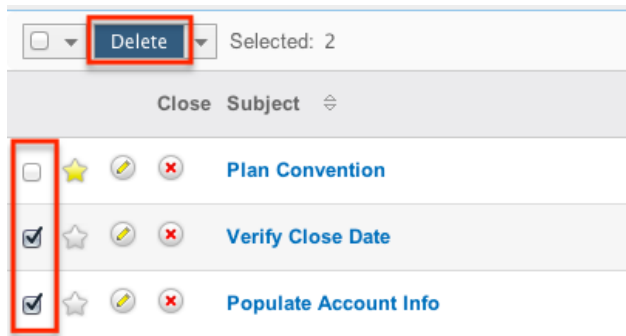
5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

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

When deleting a record, any records related to that record will not be deleted. For example: Deleting an account record will not delete any of the contacts on that account; although, it will delete the record that associates each contact to the account.

Mass Update Records

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

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

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

1. Navigate to the list view by clicking the module tab in the navigation bar.
2. Use the list view's Basic or Advanced Search to identify records you wish to modify.
3. Select the desired records individually or using the {{web.link("#Selecting_Records","checkbox dropdown's")}}options.
4. Choose "Mass Update" from the Actions menu.
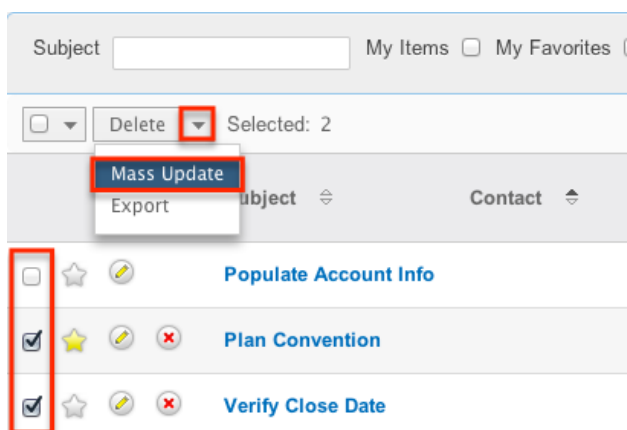
5. Scroll to the Mass Update panel and set values for the fields you wish to alter. Note: For the Teams field, use "Replace" to remove existing team assignments before adding those specified here. Use "Add" to add the teams specified here to any existing team assignments.
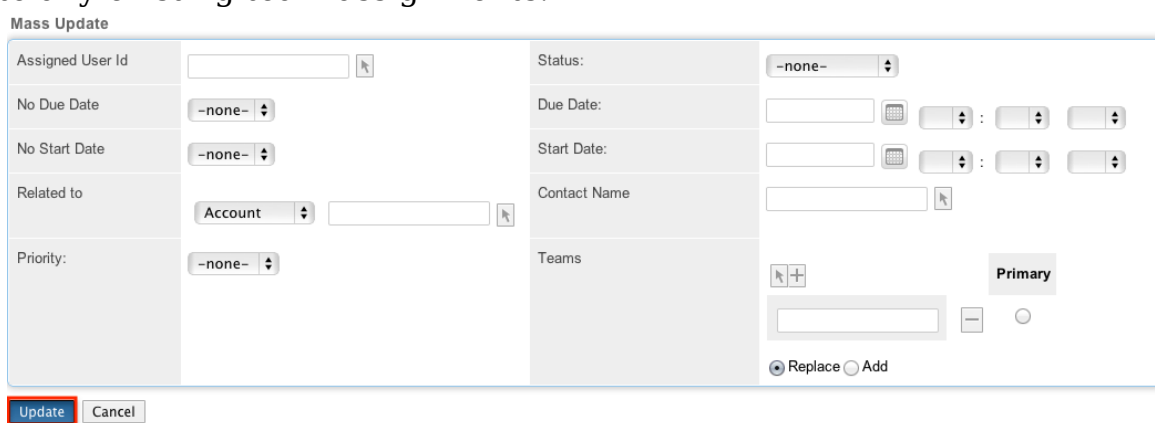
6. Click "Update" to save the changes to all of the currently selected records.

Merge Records

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

Basic or Advanced Search may be used to identify duplicate records by, for example, searching for records with similar names or related records. Once your search has identified duplicate records, you can merge them directly from the list view. Alternatively you can perform a "Find Duplicates" operation in the detail view of a record. For more information on finding duplicate records from the detail view, please refer to the section Find Duplicates in this documentation.
Use the following steps to merge records via the list view:

1. Use the list view's [Basic](#) or [Advanced Search](#) to identify duplicate records.
2. Possible duplicates will be displayed in the list view. Select the duplicate record(s) that you wish to merge.
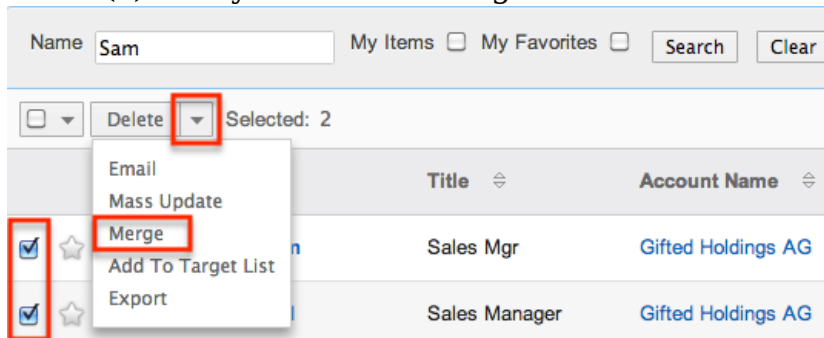
3. Select "Merge" from the Actions menu to display the Merge page. The primary record's field values are displayed on the left while other record's values are in columns to the right. Saving the merge will preserve only the leftmost values for each field into a single record.
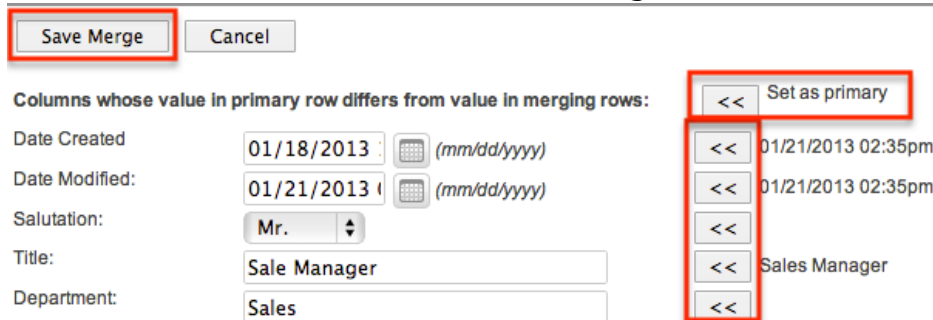
4. The system treats the first record that you select as the primary record. To change which record is considered the primary, click the "Set as primary" double arrows.
5. Review the field values in each column and use the associated double arrows to move the best value for each field to the leftmost column.
6. Click "Save Merge" once the left column contains all fields you wish to appear on the single, merged record.
7. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Ok" to proceed.

Export Records

Sugar's Export option allows users to download all fields for the selected records to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered records back into Sugar. For more information on updating existing records via import, please refer to the [Import](#) documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of records. If you encounter an error when performing this action,

we recommend selecting the records in smaller batches.

Records may be exported from the list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for records and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the [Export](#) documentation.
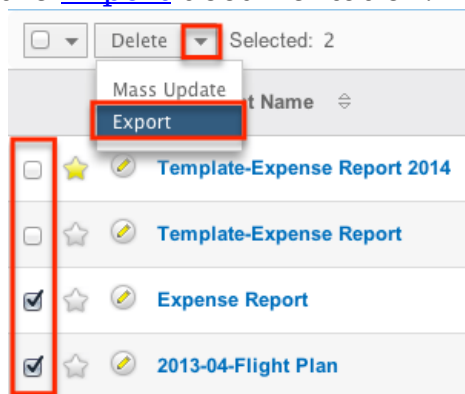
Please note that your ability to export from Sugar may be restricted by a role. For more information on roles, please refer to the [Role Management](#)documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

Favoriting Records

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

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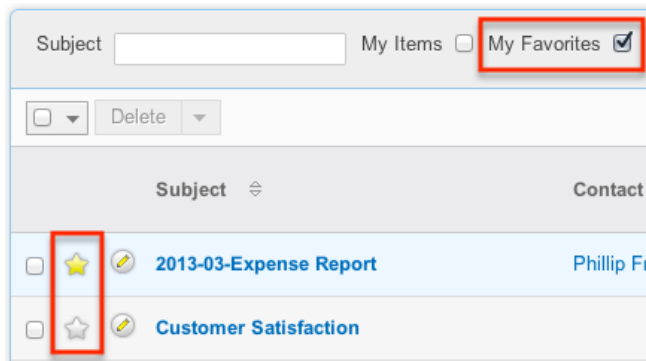
Quick Edit

The quick edit is available in most modules' list view and subpanels. You can quick edit records via the list view by clicking the Pencil icon to the left of each record's name or subject. A pop-up window will open with the quick create form which is a shortened version of the edit view layout. This allows you to make quick changes to records without navigating away from the page currently being viewed.
Use the following steps to quick edit records via the list view:

1. Navigate to the list view by clicking the module tab in the navigation bar.
2. Use the Basic or Advanced Search to find the records you wish to edit.
3. Click the Pencil icon to the left of each record's name or subject to display the quick create form.

4. Update the necessary fields, then click "Save" to preserve the changes.
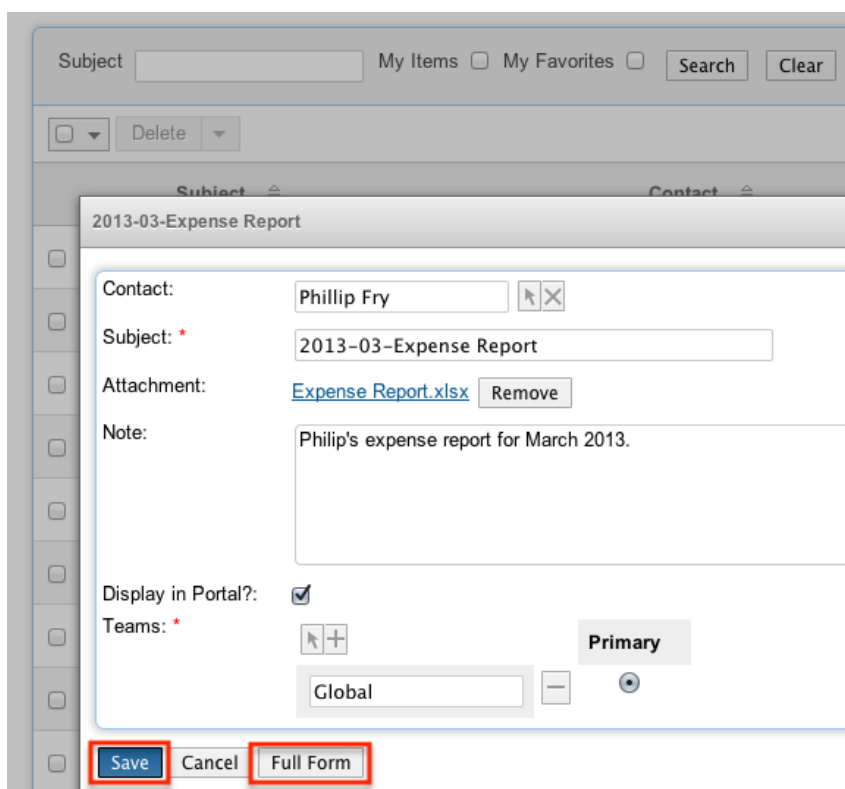
Note: If you want to make detailed changes, click Full Form to navigate to the edit view for that record.

5. Repeat steps 3 and 4 for the remaining records to be modified.

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

Administrators in Sugar may configure both the edit view and quick create via Admin > Studio. For more information on configuring layouts, please refer to the documentation in the Administration guide.

Sorting Records

The List view in Sugar provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field simply click the column header noting that the fields which allow sorting will have a pair of arrows next to it. Columns with no arrows next to them are not sortable (i.e. Email Address).

Click the column header again to reverse the sort order. The list view may be sorted by only one column at a time. You can also set a default order-by column using the layout options in Advanced Search. For more information on setting a default column sort, please refer to the Layout Options section of the Search

documentation.

Pagination

List view displays the current search results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. To the right just below the search panel you can see which records of the total results set are currently being displayed.

The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page.

The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of your current results.

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

More Information

Many modules have a method for viewing more information about a record in the list view. Additional details can be viewed by clicking the "i" icon to the far right of each list view row.

This provides users a quick view of additional information in addition to what appears in the display column fields. The resulting pop-up window will show the additional fields configured by default. The list of fields appearing here may only be configured through a code-level customization. Click the "X" to close the Additional Details window.

Detail View

Each module in Sugar contains a detail view to view and perform actions on a single record within a module. To access a record's detail view, simply click on the name or subject link from anywhere in the application including from the module's list view.

The detail view displays thorough information of the record grouped by module-specific field panels.

Rex Stallard ☆

Edit ▾

Overview

Name:	Rex Stallard	Office Phone:	(846) 031-3096
Title:	President	Mobile:	(860) 061-6951
Department:		Fax:	
Account Name:	Davenport Investing	Website:	
Primary Address:	777 West Filmore Ln Alabama CA 71792 USA	Other Address:	
Email Address:	im85@example.info (Primary)		
Description:			

More Information

Status:	New	Lead Source:	Campaign

You can also view the record's related records which appear in subpanels beneath the field panels. Which subpanels show here is based on the relationships defined for the current module and administrative settings on which subpanels to display. You can also expand and collapse subpanels as well as reorder them. For more information on how to change the display of subpanels, please refer to the Subpanels section. Users with administrator or developer access have the ability to change the fields (i.e. Name, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the

Please note that you will only be able to view a record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentations in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Pagination

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

The text in between shows which record result you are currently viewing within the total number of current results.

Depending on your Sugar settings you may see the count of records being selected or you may see a plus sign (+) to refer to more records.

Action Menu

The Actions menu on the top left of each detail view allows you to perform various actions on the current record.

The actions menu provides possible actions such as Edit, Duplicate, Delete, View Change Log, Find Duplicates, and many others to perform on one record. Not all modules have all actions available and many actions are built for only a single module (i.e. Convert Lead). The sections below will cover the most common actions across the modules. For more information on an action not listed here, please refer to the Detail View Action Menu section of the module's documentation in the application guide.

Administrative users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the System documentation in the Administration guide.
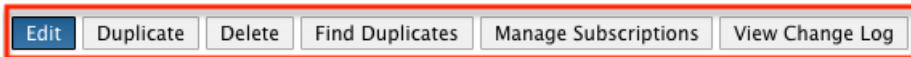
Edit a Record

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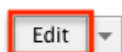
For more information regarding the edit view and hos to edit records in Sugar, please refer to the [Edit View](#) section of this documentation.

Duplicate a Record

You can create a new record by duplicating an existing record from the detail view. The duplicate option is useful if the record you are creating has similar information to an existing record. Any related records on the source record will not be duplicated over to the new record.
Use the following steps to create a record by duplicating an existing record:

1. Navigate to a record's detail view.
2. Click the Actions menu and select "Duplicate".
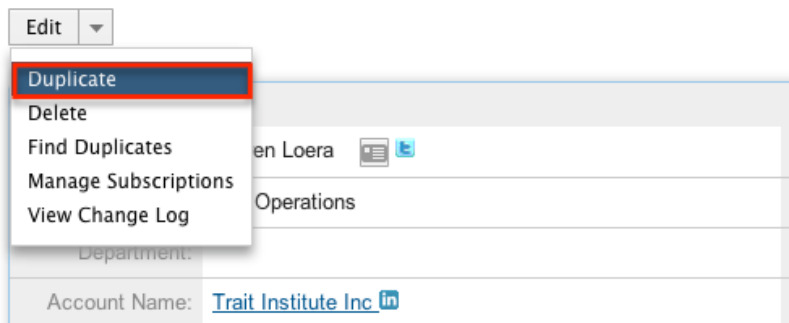
3. The displayed edit view is pre-populated with the original records values. Update the necessary fields, then click "Save".

Delete a Record

The detail view in Sugar allows you to delete a record. When deleting records in Sugar, they are not permanently deleted from the database, but are only put into a deleted status so Sugar will not see them. These records can be recovered by anyone with direct database access.
Use the following steps to delete a record via the detail view:

1. Navigate to a record's detail view.
2. Select "Delete" from the Actions menu.
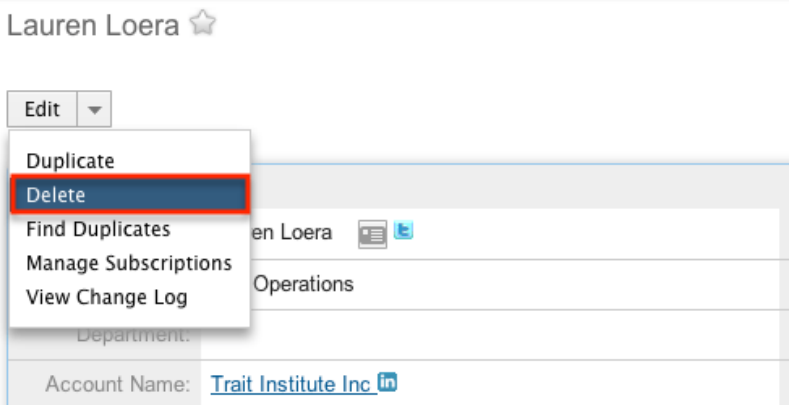
3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Find Duplicates

The find duplicates action in Sugar is useful for checking a specific record for any duplicate records that may exist in the same module. Not all modules have the find duplicates action and the action can currently only be performed on one record at a time. Find duplicates is available from the detail view of the Accounts, Contacts, Opportunities, Leads, Cases, and Bug Tracker modules.

Please note that your ability to use the Find Duplicate action may be restricted by any role which prevents deletion. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Find Duplicates option.
Use the following steps to find duplicate records via the detail view:

1. Navigate to a record's detail view.
2. Select "Find Duplicates" from the Actions menu.
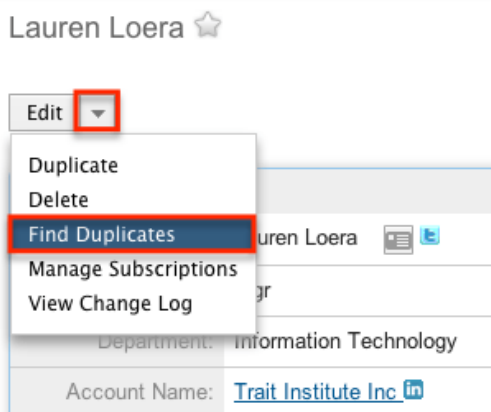
3. This step of the process allows you to select which fields will be searched on within the module to find potential duplicate records.
4. Select any field from the Available Fields panel and click the Right arrow to add them as a filter.
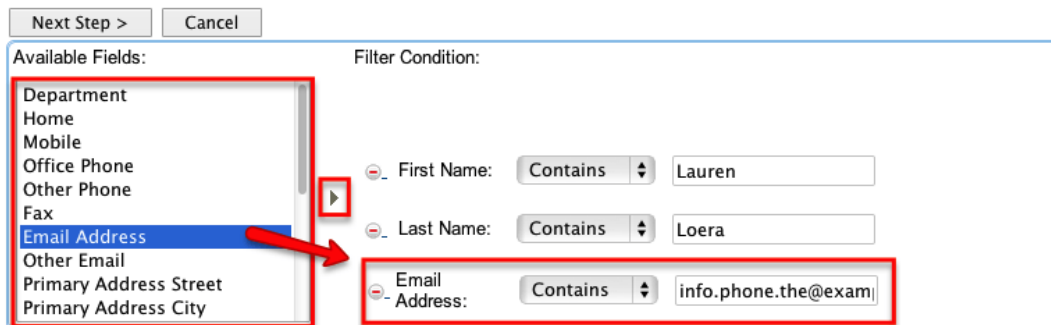
5. To remove a filter, simply click the "Minus" icon next to the filter.
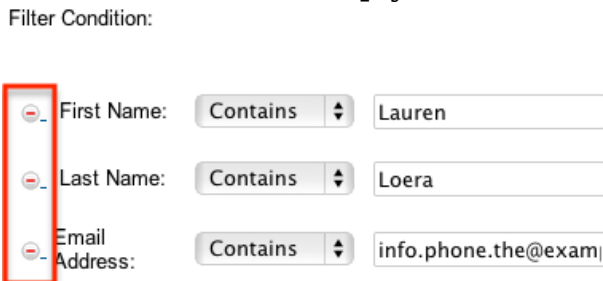
6. When you are happy with the filters, click "Next Step" to proceed.
   Note: Sugar will perform an "and" operator between the filter criteria. For example : A filter for First Name: "robert" and a Last Name: "smith" will look for records that match "robert" and "smith". So a Contact with a name of "Bob Smith" will not be found as a duplicate.

7. A list view will populate with any results that match your filters. Select any records that you wish to have merged with the original record and click "Perform Merge".
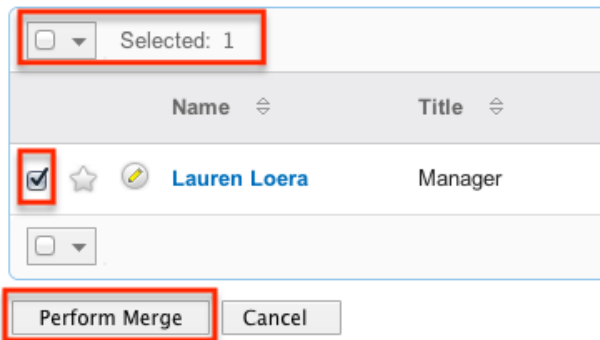
8. From this point you may follow the steps outlined in the [Merge Records](#) section in this documentation to complete the merge.

Get Data

The Get Data action is only available for the Accounts module by default but can be enabled for many other modules. Get Data will connect out, using Sugar's connectors, to third party data providers to query and return basic information on a company or person. By default the only data connector enabled is the Hoovers connector.
The following connectors are available by default in Sugar:

- Hoovers
- Zoominfo - Company
- Zoominfo - Person

Users with administrator access have the ability to enable and configure connectors via Admin > Connectors. For more information on enabling and configuring connectors, please refer to the [Connectors](#) section in the System documentation in the Administration guide.
Use the following steps to find and merge Account data via the detail view:

1. Navigate to an account record's detail view.
2. Select "Get Data" from the Actions menu.
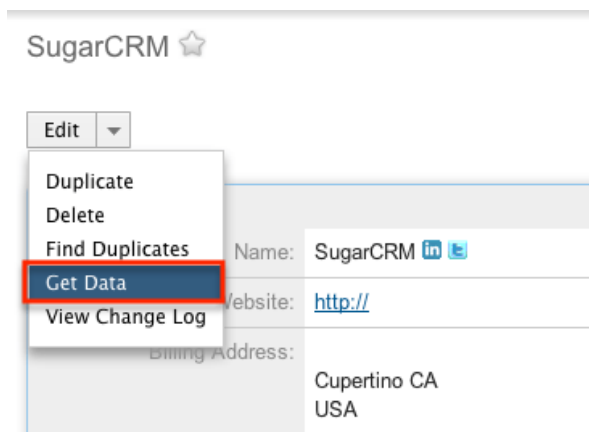
3. The "Search and View Data" screen will appear with the current account's name populated in the Company Name search field.

Note: The contents of this search field can be modified if you are not seeing the results you are looking for. Simply type in a new value into the Company Name field and click "Search".

4. The search results are displayed below, separated in tabs by which connectors you have enabled. The search fields can be different for each connector and can be configured via Admin > Connectors. For more information on configuring connectors, please refer to the Managing Connector Search section in the System documentation in the Administration guide.

Note: You can hover over the "i" icon to get more information about the data pulled from the connector.

5. Select the record from the data connector you wish to merge with your record in Sugar and click "Merge".
Note : If multiple connectors are enabled, you can select one record in each connector to merge data from multiple sources.

6. You will now see your record data currently in Sugar on the left side of the screen and the external data from each connector to the right hand side.

7. Click the double arrow at the top of a connector's column to move all data from that connector over to Sugar.

8. Alternatively you can select the double arrow next to each individual field to move select data over to Sugar.

9. A convenient way to move data into Sugar is to use the Smart Copy feature which will move data from the right most connector first. If a field exists in a different connector than the right most, it will move over to Sugar from that connector instead of leaving the field blank.

Note: The columns on the left side are highlighted the corresponding color of the connector to which the data was populated from.

10. Once the data in the left hand column matches what you want the Sugar record to contain, click "Save" to complete the merge.

View Change Log

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

Field Panels

Field panels are what hold the fields for a record in the detail view. Most modules come with three panels defined by default: Overview, More Information, and Other. Field panels can be collapse to hide unnecessary data.

Users with administrator or developer access have the ability to change the fields (i.e. Name, Assigned User, etc.) and labels inside the field panels as well as move, create, and edit existing field panels via Admin > Studio to provide visibility to the most important fields. Field panels can be collapsed by default and can also be changed to display as tabs or to display as a combination of panels and tabs.

For more information on modifying field panels, please refer to the Studio documentation in the Administration guide.

External Data Connectors

Sugar comes with many built in connectors to external data sources to enable you to connect your Sugar data to common social media platforms. These integrations can help to bring you closer to your customers and partners using social media. The following are common connectors that are included by default with Sugar: InsideView, Twitter, and LinkedIn. For more information on what connectors are available and how to enable and configure them, please refer to the Connectors section in the System documentation in the Administration guide.

InsideView

The InsideView subpanel, if you are an InsideView user, provides relevant company information, news, and social media insights within your record's detail view. The InsideView subpanel will appear by default on the detail view of the Accounts, Contacts, Leads and Opportunity modules. Clicking the double arrow next to "InsideView" can minimize the panel. Administrators in Sugar also have the ability to disable InsideView for the entire instance or for specific modules so that it is not visible to users. For more information on enabling or disabling InsideView, please refer to the Enabling Connectors section of the System documentation in the Administration guide.
When accessing the subpanel, InsideView performs a search based on values in the Account name field or the Contact name and displays the results in the InsideView panel. If InsideView finds multiple results it will provide you with the ability to search and select the record that matches your Sugar record.

From inside the subpanel you have the ability to read information on the company or contact you are referencing. Here are some of the sections in InsideView that you can take advantage of:

- Company Information:
    - Overview
    - People
    - Buzz
    - Family Tree
    - Competitors
- Contact Information
    - Current Employment
    - Contact Information
    - Recent News

For more information on the abilities of InsideView, please refer to their website at www.insideview.com.
Note: The extent and depth of information that you can access in InsideView depends on your InsideView subscription. For more information, see:
http://www.insideview.com/compare-insideview-plans-free-crm-pro-and-team-sales-intelligence

Twitter

Sugar provides two different features for Twitter integration:

- Integrate your Twitter feed into the Activity Stream
- View Tweets from module detail views

To integrate your Twitter feed into the Activity Stream on your homepage a Sugar administrator will have to configure the Twitter connector from the Admin >

Connectors page. For more information on how to integrate Twitter into user's Activity Stream, please refer to the [Connectors](#) section of the System documentation in the administration guide.
Use the following steps to view tweets from a company or person via the detail view:

1. Navigate to a record's detail view for a module that has the Twitter connector enabled.
   Note: Twitter is enabled by default for the Accounts, Contacts, Leads, and Targets modules. Sugar administrators can enable or disable modules via Admin > Connectors.
2. Select the Twitter icon next to the record's name.
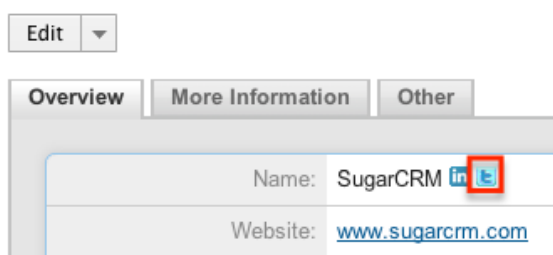
3. By default the Twitter connector will use the following fields to connect to a Twitter account:

Module	Field
Accounts	Name
Contacts	Full Name
Leads	Account Name
Targets	Account Name

Note: The field must match identically to a Twitter user name or the Twitter window will not show any results. We recommend creating a new field in each module you have Twitter enabled to store the exact Twitter user name of the Account, Contact, Lead, or Target. A Sugar administrator will then have to point the Twitter connector at this field to make the link. For more information on how to configure which field is used for the Twitter connector, please refer to the [Mapping Connector Fields](#) section of the System documentation in the administration guide.
A popup window shows the most recent activity for the Twitter user name. From this window you can perform the following actions in Twitter:
   - Reply
   - Retweet
   - Favorite
   - Navigate to the Twitter user's homepage

Note: You will need to have an account and be logged in to Twitter to perform

these actions.
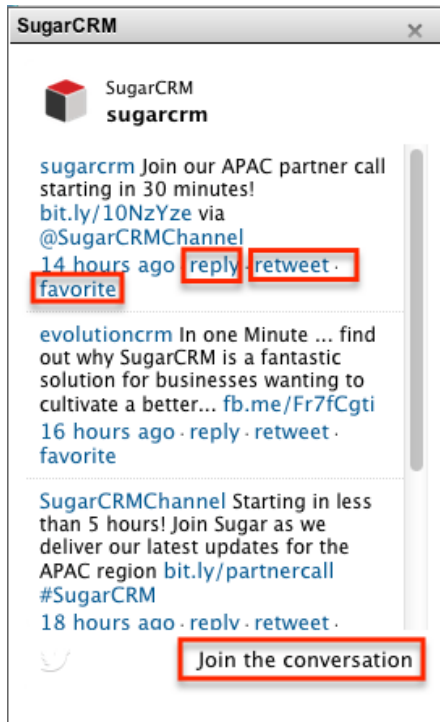
LinkedIn

The LinkedIn connector allows users in Sugar to view any connections they have to companies or people through LinkedIn. When logged in to LinkedIn, you will see any company matches and any connections your LinkedIn account has with any people in that company.

Use the following steps to view LinkedIn information from a company or person via the detail view:

1. Navigate to a record's detail view for a module that has the LinkedIn connector enabled.
   Note: LinkedIn is enabled by default for the Accounts, Contacts, Leads, and Targets modules. Sugar administrators can enable or disable modules via Admin > Connectors. For more information on how to enable the LinkedIn connector for more modules please refer to the Enabling Connectors section of the System documentation in the administration guide.
2. Select the LinkedIn icon next to the record's name.
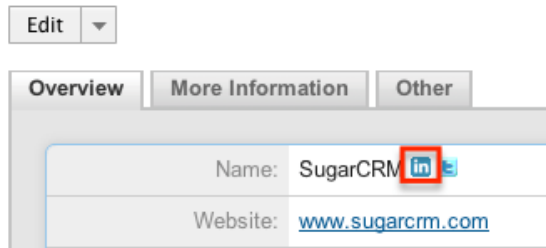
3. By default the LinkedIn connector will use the following fields to connect to a LinkedIn company name:

Module	Field
Accounts	Name
Contacts	N/A
Leads	Account Name
Targets	Account Name

Note: The field matches up to only a LinkedIn Company Name, not a person name.

A popup window shows any connections to people you have at the company located. From this window you can perform the following actions in LinkedIn:

- Follow the Company
- View Connections
- View the Company's LinkedIn Page

Note: You will need to have an account and be logged into Twitter to perform these actions.
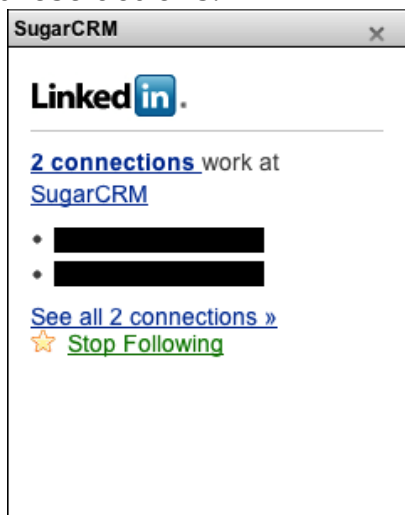
Subpanels

The Detail View of a record displays related information in subpanels. Each module has a subpanel that consists of rows for each related record. Each subpanel has

some default actions to create new records in the related module or to link an existing record. Some subpanels are different or have special actions and behaviors.

InsideView

The InsideView subpanel, if you are an InsideView user, provides relevant company information, news, and social media insights within your record's detail view. The InsideView subpanel will appear by default on the detail view of the Accounts, Contacts, Leads and Opportunity modules. The subpanel will be collapsed by default until you expand it and agree to InsideView's Terms of use and Privacy Policy.
For more information on InsideView, please refer to the [InsideView](#) section in the External Data Connectors section in this documentation.

Activities and History

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

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

		Equals "Deferred"
	Calls	Equals "Held"
		Equals "Not Held"
	Emails	N/A
	Notes	N/A

Since the activities and history subpanels contain records from many different modules, there are some differences in the actions and record display than in normal subpanels. Each record in both subpanels will have an icon to the far left indicating which module the record is from. For example: If the record is a call then the icon will show as a telephone.

Hover over the icon to get a tooltip of what module the record belongs to.

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

You have the following actions available from the Activities subpanel:

- Create Task : Creates a new task record related to the record currently being viewed.
- Schedule Meeting : Creates a new meeting record related to the record currently being viewed.
- Log Call : Creates a new call record related to the record currently being viewed.
- Compose Email : Launches the Compose Email popup while relating the new email to the record currently being viewed as well as populating the email address from the record in the "To".

Note: When creating a Task, Meeting, or Call from the Activities subpanel, you have the ability to set the status field to an option that will place it in the History subpanel.
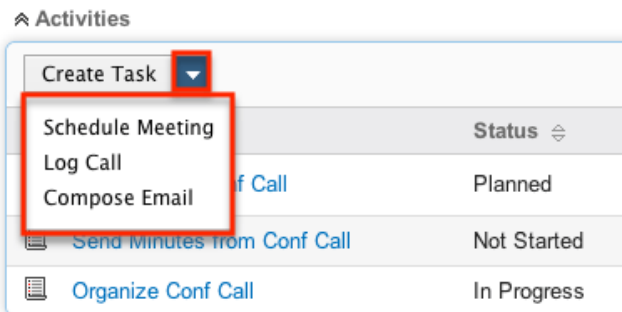
You have the following actions available from the History subpanel:

- Create Note or Attachment : Creates a new note record related to the record currently being viewed.
- Archive Email : Allows a received email to be entered manually on a record for historical purposes only.
  Note: This will not send an email to you or the email address on the record.
- View Summary : Opens a popup window with the Subject, Status, and Detail of all records in the History subpanel. This is useful to see a step-by-step history of all of the records and the details of each on one page.
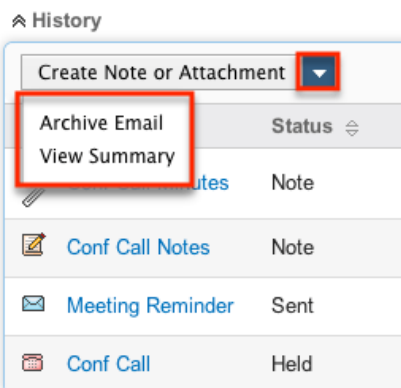
Tab Groups

Sugar by default will display all associated subpanels in the detail view. Users have the ability to filter subpanels into tab groups by selecting the predefined tabs below the inside view panel.
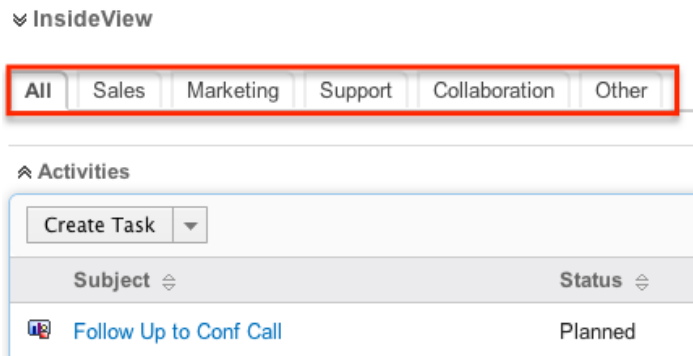
The tab groups are defined by the module filters configured in Admin > Configure Module Menu Filters. For more information on how to add or modify a module menu filter, please refer to the Developer Tools documentation in the Administration guide.
Note: The Activities and History subpanels will always appear under the "Other" tab and the "Other" tab can not be removed.

Layout

Subpanels in Sugar can be personalized by each user to display only the relevant subpanels in a specific order:

- Collapse / Expand : Click the double arrow on the top left of each subpanel to either collapse or expand it.
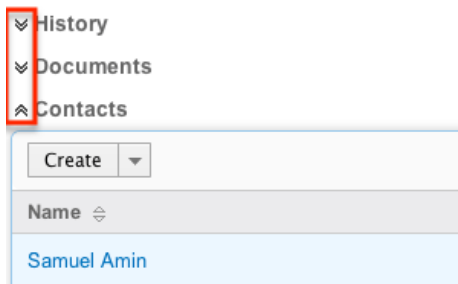
- Rearrange Subpanels : Click and drag the subpanel's header bar to move it up and down on the page.
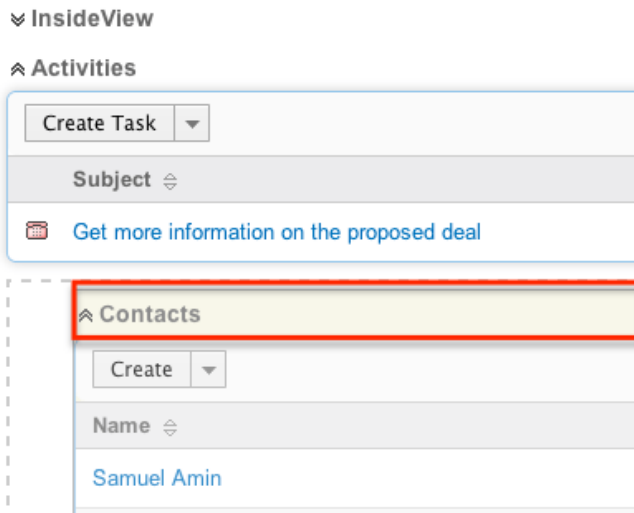
Note: Administrators can prevent users from moving subpanels to different locations in the detail view. For more information on preventing rearranging of subpanels, please refer to the System documentation in the Administration guide. Check with your system administrator if you are not able to rearrange your subpanels.

Actions

Subpanels also provide some ability to add and edit related record data:

- Create a new record to be related : Click the Create button to create a new record for the module that the subpanel belongs to. The quick create form for the module will appear inside the subpanel and the new record created here will be automatically related to the main record.

- Select an existing record to be related : Click the Select button in the action menu to launch a search popup. This will allow you to locate an existing record in the subpanel's module to relate to the main record.
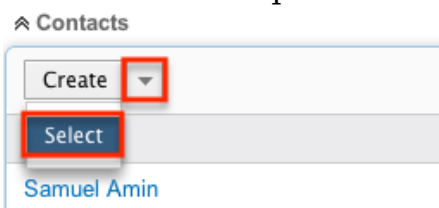
You may also select multiple records in the search popup to be related to the main record.
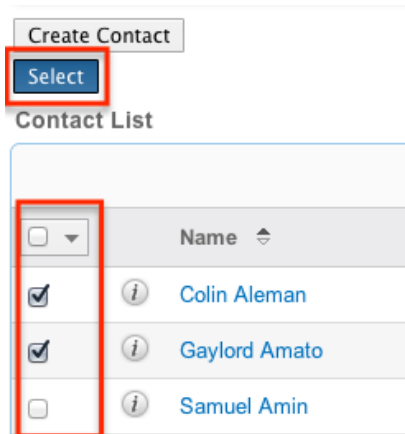
- Edit a related record : Click the Edit button on the related record inside the subpanel to launch the quick create for the related record's module. Change any existing data on the record and click Save.
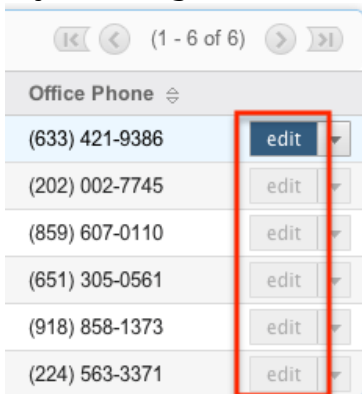
- Remove a related record : Click the unlink button from the action menu on the related record inside the subpanel to remove the relationship between the related record and the main record.
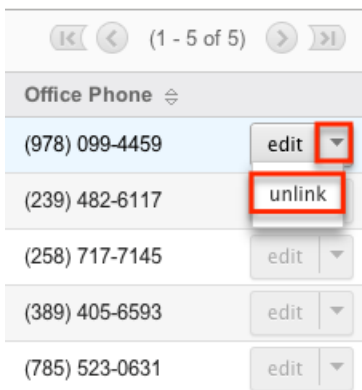
Note: This will not delete the related record, but will only remove the relationship between the two records.

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

Paging

Each subpanel shows related data for the record being viewed. Subpanels have some abilities to help view and organize the data in the subpanels:

- Sort Records : Click the column header to sort by that column, clicking again to reverse the sort direction. Sortable fields will have a pair of arrows next to the column name and each subpanel may be sorted by only one column at a time.
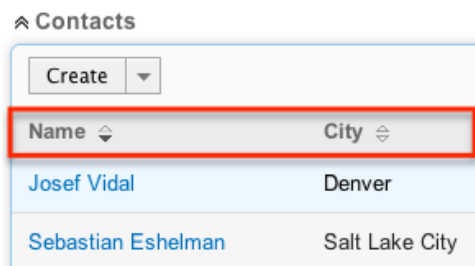
- Record Paging : The top right of the subpanel shows which records of the total are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of the set.
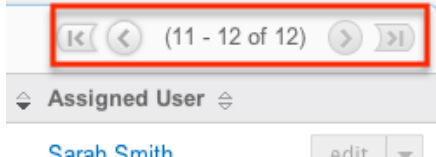
  Note: By default, Sugar displays 10 records per subpanel page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.

Record Actions

Subpanels can have a variety of actions that can be performed from the record within the subpanel. Each record has a link to view the record within it's own module. Typically this is the name or subject field of the record in the subpanel.
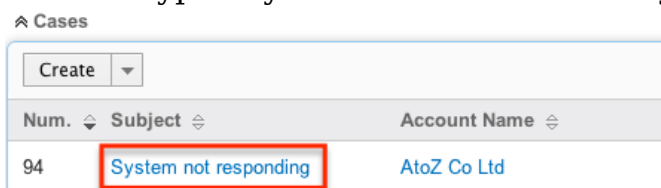
Email addresses become a link in subpanels. Click this link to launch the compose email popup with the email address pre-populated in the "To" field.

Edit View

Each module in Sugar contains an edit view to change details on a single record within a module. To access a record's edit view, simply click on the Edit button from the detail view.

The edit view displays thorough information of the record grouped by module specific field panels.

Please note that your ability to edit records in Sugar may be restricted by a role.

For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure both the edit view and quick create via Admin > Studio. For more information on configuring layouts, please refer to the documentation in the Administration guide.

Pagination

On the upper right of the edit view, there are two buttons that allow you to page through each record in the list view's current search results. Clicking the Previous button displays the previous record of the current search results while clicking the Next button displays the next record of the current search results while keeping you in the edit view.
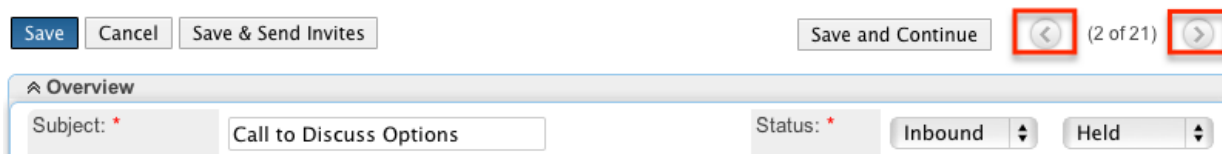
The text in between shows which record result you are currently editing within the total number of current results.
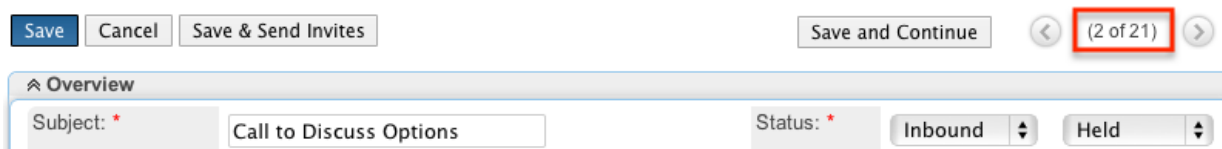
Depending on your Sugar settings you may see the count of records being selected or you may see a plus sign (+) to refer to more records.
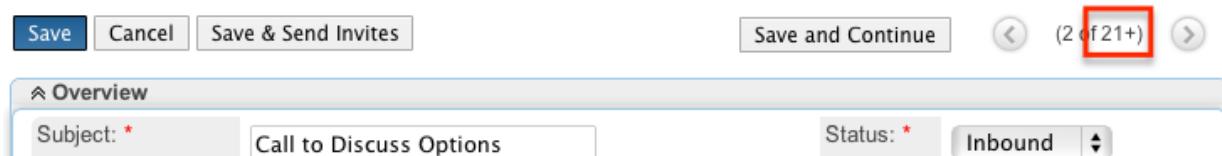
Once any edits are complete, you may click "Save and Continue". This will save the details in the current record and proceed to the next record in the current search results.

Field Panels

Field panels are what hold the fields for a record in the edit view. Most modules come with three panels defined by default: Overview, More Information, and Other. Field panels can be collapsed to hide unnecessary data.

Users with administrator or developer access have the ability to change the fields (i.e. Name, Assigned User, etc.) and labels inside the field panels as well as move, create, and edit existing field panels via Admin > Studio to provide visibility to the most important fields. Field panels can be collapsed by default and can also be changed to display as tabs or to display as a combination of panels and tabs.

For more information on modifying field panels, please refer to the [Studio](#) documentation in the Administration guide.
Note: When displaying panels as tabs, required fields on a tab that is not currently select is still required and will need to be filled in before saving.

Editing Records

The edit view's primary purpose in Sugar is to allow the editing of a record. Once you have made the desired modifications to a record's fields, click "Save" to preserve the changes. You can click "Cancel" at any time to return to the previous page without editing the record.

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

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

Editing Common Fields

There are many different types of fields in Sugar, the most common of them being text, number, dropdown, multiselect, radio, and checkbox fields.

- Text : Allows any text input with the only validation options being number of characters or required.

  Note: If a maximum character length is placed on a text field, the input box will not allow users to enter in more than that number of characters. This can be misleading, as there is no visible error other than the missing characters. The field above was limited to ten characters.

- Number : Allows any number input with possible validation of a minimum and maximum as well as required.

- Dropdown : Provides a list of options where the user can pick only one. Blank can be a valid option; although, the field can be set to be required to not allow blank.

- Multiselect : Provides a list of options where the user can pick one or more. To select multiple, hold the Ctrl button (command on MAC) on your keyboard and then click multiple options. Blank can be a valid option; although, the field can be set to required to not allow blank.

- Radio : Provides a list of options where the user can pick only one. Blank can be a valid option; although, the field can be set to be required to not allow blank.

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

Editing Date and Time Fields

Sugar provides special date and time fields to ensure data is entered in a format that the application can read and process.

- Date : Click the calendar icon next to a date field in order to open the date picker.

Click a day in the Calendar grid to enter that date into the date field.

Use the left and right arrows to go back and forward by one month.
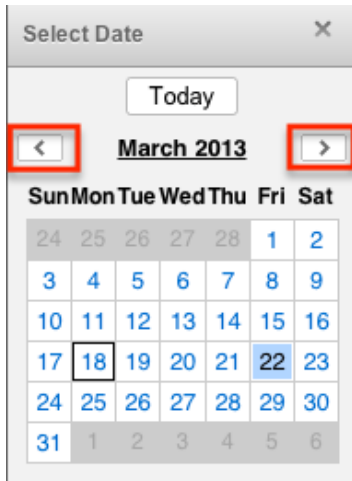
Click on the currently displayed month and year to pick a new month and year to view the calendar.
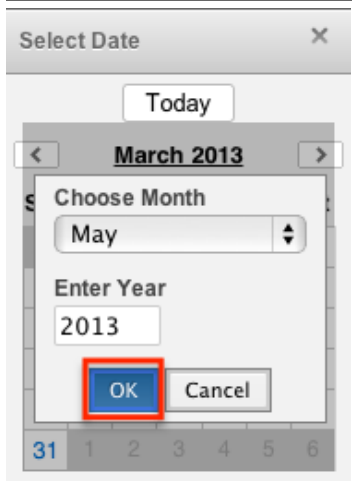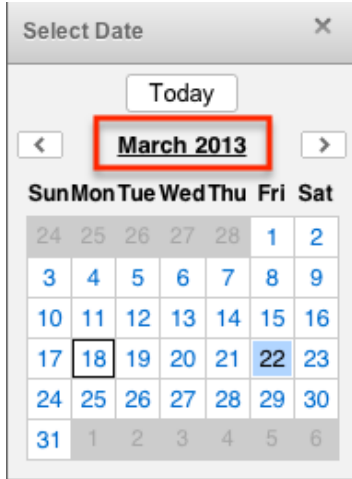
Click on the Today button to return the view back to today's date.
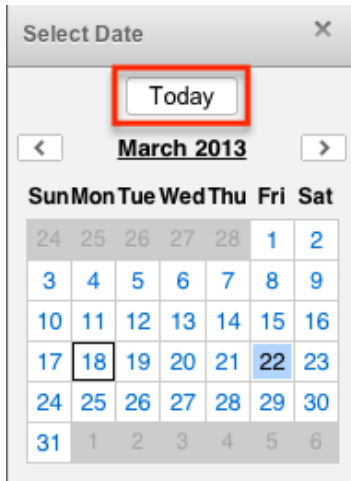
- Time : Time fields in Sugar are dispalyed as three dropdown fields moving left to right to build the time: Hours, Minutes, AM/PM.

Note: Minutes are selectable only in 15 minute intervals.

Editing Related Fields

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

- Relate : Most one to many relationships in Sugar are represented by a relate field. You will recognize relate fields by locating a field with an arrow and an "X" button next to the field. Click the arrow to open the record selection window:

Alternatively you can begin typing into a relate field and Sugar will pull up a list of records matching your typed records for that relationship:
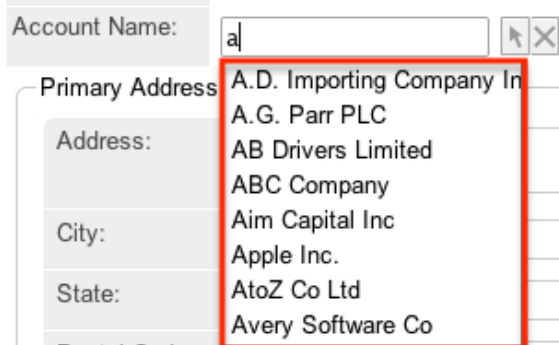
- Flex Relate : Allows a dynamic module and a record from that module to be related to the current record. This allows the user to pick which module they want this record to be related to.
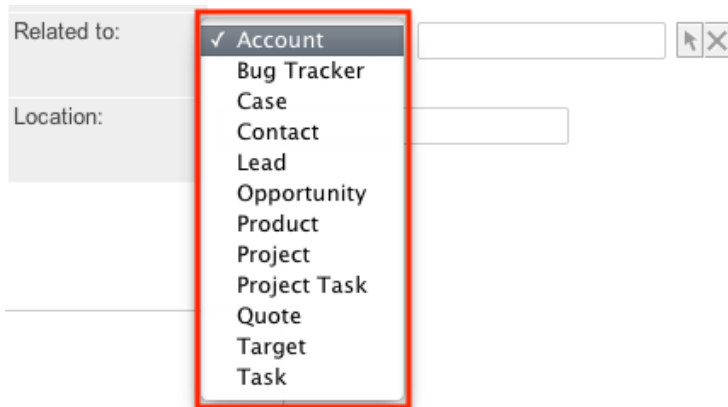
Once a module is selected, users can then select the record from that module by using the arrow button or by typing into the box.
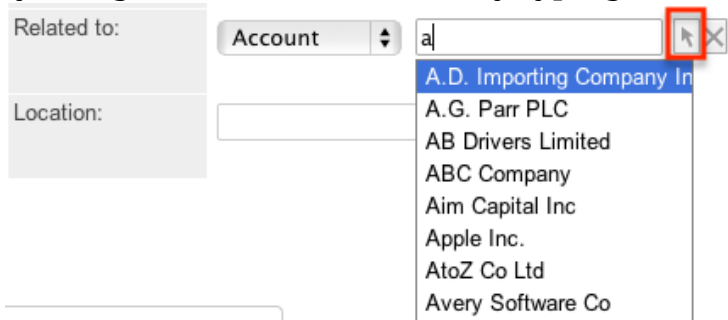
- Email Addresses : Email address fields can be linked to many different email addresses for a single record. Click the Plus button to add an email address to a record.
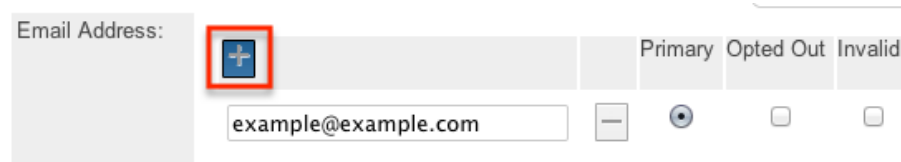
Each email address can be set as Opted Out or Invalid. Only one email address can be selected as the Primary. Click the minus sign to remove an email address from a record.

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

Click the Arrow icon to open the team selector window, or click the Plus icon to add a new row to use the type-ahead feature.
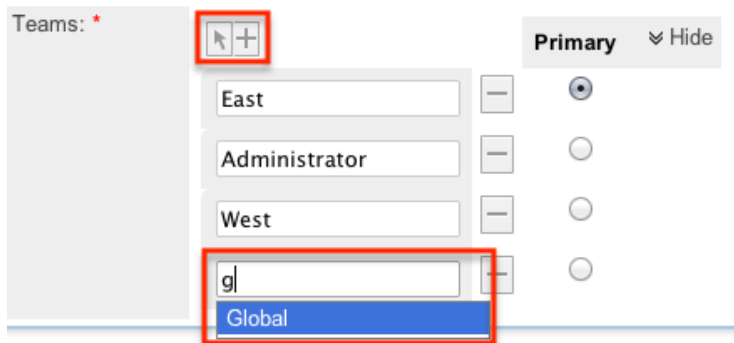
Click the Minus icon to remove a team from the record and select only one team to be the primary team.
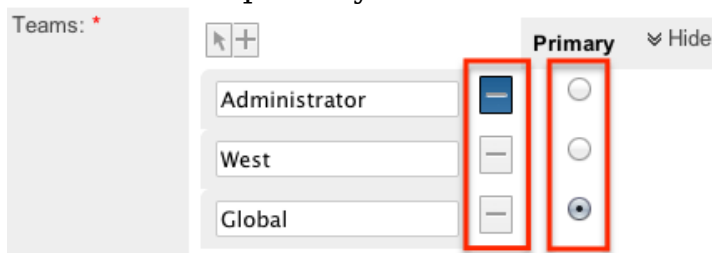
For more information on teams, please refer to the [Team Management](#) documentation in the Administration guide.

TinyMCE

TinyMCE is a third-party WYSIWYG tool that allows users to provide HTML formatting in specific sections in Sugar without requiring any HTML knowledge. TinyMCE is available when sending email, creating email templates, creating knowledge base articles, as well as other places within Sugar.
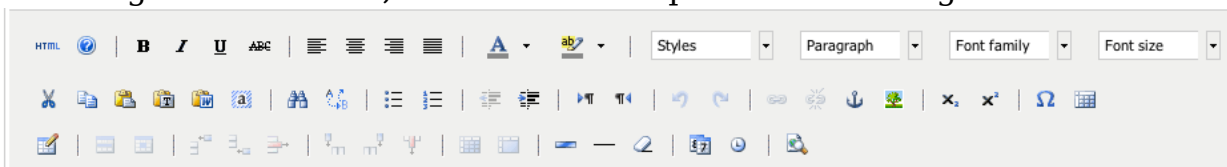
The following are some descriptions of the more commonly used features in TinyMCE:

- Text Formatting : Use the folllowing buttons to format text to be bold, italics, underlined, or stricken through.
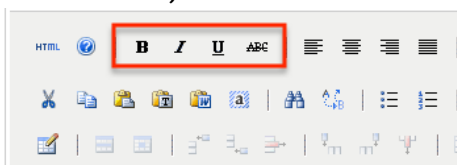
- Alignment : Use the following buttons to change the alignment of the text to be left, center, right, or justified.
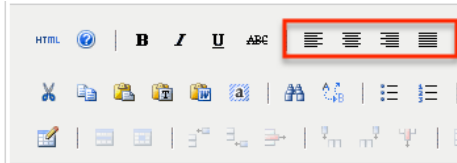
- Fonts : Use the following dropdowns to select special section formatting, fonts, and sizes.
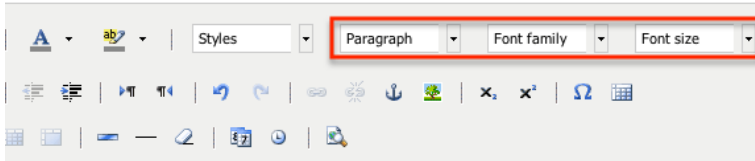
- Layout Formatting : Use the following buttons to utilize bullet list, ordered lists, and tables.
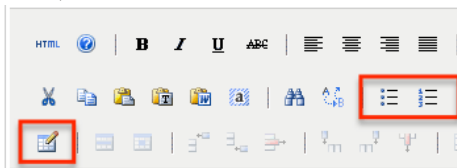
- Links and Images : Use the following buttons to create a link, remove a current link, or add an image.
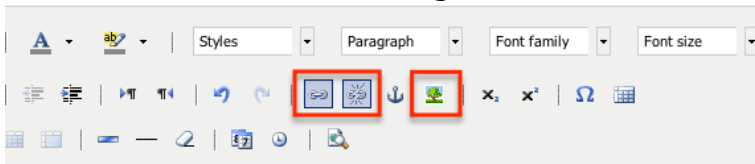
- Advanced HTML : Click the HTML button to view your content in full HTML code. You may add and change the HTML to furthur refine your content.
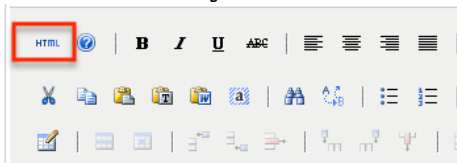
  Not all HTML is allowed to be saved in Sugar. The following are some examples of HTML that will be removed when saved:
    - Anything outside of the <body></body> tags.
    - Any <style></style> tags.
    - Any <script></script> tags.
    - Any <form></form> tags.
    - Any <input> tags.Note: Inline CSS can be added to some elements (e.g. <p>, <pre>, and <span>), but due to different email client's rendering HTML email in unexpected ways, inline CSS is not allowed on some elements (e.g. <div>, <img>, and <table>).

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Search

Overview

Sugar comes with the ability to search across the entire system to easily locate and filter records in all modules. A search can be performed within the list view of a specific module to filter for data in that module, or a search can be performed in the global search box located on every page. The global search is a quick way to find a specific record where the module search makes finding a set of records for a specific module easy. This documentation will cover how to use the Classic Global Search, Full Text Global Search, Basic Module Search, and Advanced Module Search.

Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. For information regarding searching within a single module, please refer to the [Module Search](#) section in this documentation.

The Global Search bar is typically located on the top right hand side of each Sugar screen. Sugar global search can be configured to use the classic mode or can be enabled with full text searching. Classic global search requires users to enter a text string to perform a search where full text provides a type ahead feature that shows results as the user types.

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

When you perform a search in global search and no results are returned, you can select "Advanced Search" to perform a more granular search or change your global search preferences.

For more information on the advanced search, please refer to the [Advanced Options](#) section in this documentation.

Full Text Global Search (FTS)

Beginning with version 6.5.0 of Sugar, global search can be enabled with full text searching abilities utilizing the elasticsearch engine. Full text search (FTS) allows users to search throughout all fields and modules for an enhanced search experience.

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

Instances hosted on SugarCRM's On-Demand platform have FTS enabled by default and can not be disabled through the Admin page. Enabling full text search will improve the overall performance in global search as well as enhance the search experience for users. For more information on how to enable and configure FTS global search, please refer to the System documentation in the Administration Guide.

Use the following steps to search for a contact name using the full text global search:

1. Click into the Global Search box in Sugar and type in your search.
2. FTS has autocomplete enabled; Sugar will start searching the system once you enter in at least three characters into the search field.

3. Up to ten results are shown as well as the field that met your search criteria for each result.
4. Click on the record name in the results dropdown panel to view the record details.

Wildcards

Wildcards can be used to search for criteria without including the entire word in the search. Use a wildcard character in place of characters you do not require in your search. Use may use any number of wildcard characters in any combination you desire. The following wildcard characters can be used in the FTS global search in Sugar:

Character	Wildcard Use
% or *	Matches any number of characters, including zero
?	Matches only one character
""	Matches the entire word or group of words within the double quotes
-	Removes results matching the phrase following the minus sign

Note: FTS global search automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to pull up all records that include the keyword entered in the search. If performing a multiple word search, the wildcard is only appended to the last word, not all words. If you click the search button or hit Enter/Return the wildcard will no longer be appended and Sugar will only search for an exact match of your search criteria.

Use the following as examples to search using wildcards in FTS global search in Sugar:

Search Criteria	Would Match	Would Not Match
rob	Rob, Robert, Robin	Bob, Jacob, problem
%bert	Albert, Bert, Robert	Bart
r?b	Robert, Ruby	Bob, Raab
%s?i	Dustin, Christi, Smith	Sophie, Josephine
??it	Fritz, Smith	Rita, Schmitt
r?b% AND smit%	Robert Smith, RobSmite	Bob Smith, Robert Phillip
rob smit	Rob Smith, Rob Smite	Robert Smith, Robert Smite
"smith"	Smith & Sons, Smith Corp	Smithson Corp
"Rob Smith"	Rob Smith, The Rob Smith Corp	Rob Smitherson, Aaron Smith
Smith -Rob	Jane Smith	Rob Smith, Robert Smith

AND vs OR

As opposed to the classic search, full text global search uses the "or" operator by default when multiple keywords are entered in the search box. For example : Search for "Jim Smith" will look for records that match "jim" or "smith". In this case the Robert Smith lead and contact will be returned despite the "jim" search not matching the record, the "smith" search did. The lead Lonny Smith will also be returned for matching on "smith".

Another advantage FTS has is the ability to overwrite the default "or" operator with an "and" operator. To use an "and" operator, simply add an all caps "AND" between the two words you are searching for. Using the example above, in order to exclude the lead Lonny Smith from our "robert smith" search, we can search instead for "robert AND smith". This will look for records that match "robert" and "smith". Now the Robert Smith lead and contact will return while excluding the Lonny Smith lead.

Note : If the "AND" is not in all caps, then the search will consider it a keyword to search on and will leave the operator as an "or" between the words.

View All Results

Click the View all results link at the bottom of the results window to see all of the results from your search. Here you will be able to see the modules and their respective counts on the left side of the page as well as the results of the search towards the right.

Here you can select which modules to show results for. The results section will show ten results at a time. If you wish to see more, select the Load More button at the bottom of the results.

Filtering by Module

FTS global search gives you the option to filter the search results by module in the all results page. The filter by list has the "Show All" option checked by default to show results from all modules. In order to just see matching records for specific modules, you can mark the checkbox for that module in the Filter By list.

Alternatively you can add a special command to your search criteria to filter the results down to a specific module. For example, we want to search all fields in the Leads module for anyone with the name of "Cliff". You could search for cliff and then navigate to the all results page to filter out all modules except leads. You can also enter the following into your search criteria: Leads._all:cliff

This tells FTS to search the leads module and all fields for the value cliff. This can be done with any module that has FTS enabled, including custom modules.
For more information on how to filter by module and field name, please refer to the Filtering by Field section below.

Filtering by Field

FTS global search has the ability to add a special command to your search criteria to filter results out by field name or by module and field name. For more information on how to filter by module only, please refer to the section Filtering

above.

For example, we want to search for records in any module with a name that contains "plan". Searching for "plan" in the FTS global search returns records with plan in the account name, email address, and any other field that is enabled for searching.

If instead we search for name:plan, we only see records where the field "name" contains the criteria off "plan".

If we want to continue to filter this down, we can add module to the criteria by searching Accounts.name:plan.

Note : The search criteria must have the proper module and field names and is case sensitive. A lowercase "a" in accounts will return no results and if you are filtering on the shipping address city field it must be specified as shipping_address_city. The module and field name must match to the values shown in Admin > Studio. For more information on accessing Studio, please refer to the documentation in the Administration guide.

Admin Configuration

Sugar administrators have the ability to globally enable and disable modules for the FTS global search. A globally disabled module will not be included in the results of a FTS global search and will not be available in the list of modules for users to enable and disable in the advanced search section.
For more information on how to enable and disable modules for FTS global search, please refer to the Search section in the System documentation in the Administration guide.
Administrators also have the ability to enable and disable specific fields for FTS global search as well as setting the priority of the field in the search. To give a field a greater weight when searching you need to adjust that field's boost level. When a search is performed, matching records containing fields with a greater weight will be appear higher in the search results.
For more information on how to add or remove fields from FTS global search or to change their boost level, please refer to the Studio documentation in the Administration guide.
Note : If changes are made to your instance's full text configuration, users on SugarCRM Mobile must log out and back in for the corresponding fields to be displayed as expected.
FTS global search functions off of an index created from the data in your system. When creating and updating records, data is added and modified in the index accordingly. Occasionally the index can become corrupt or inefficient. When this happens a system index is required. This can be performed manually from the Admin > Search screen or can be scheduled by creating a scheduler for the full-text search index system job in Admin > Schedulers.
For more information on how to run a system index on FTS, please refer to the System documentation in the Administration guide.
For more information on automating a system re-index, please refer to the Schedulers documentation in the Administration guide.

Classic Global Search

The classic global search allows users to search based on certain stock fields such as first name, last name, email address, office phone etc. You do not have the ability to add or remove fields from the classic global search although your administrator can add and remove modules. For more information on how to include or exclude a module from the classic search, please refer to the System documentation in the Administration guide.

Use the following steps to search for a contact name using the classic global search:

1. Click into the Global Search box in Sugar and type in your search.
2. Hit the Enter key on your keyboard or click on the magnifying glass icon.

3. Up to five results are shown per search-enabled module.

Your Sugar administrator can control which modules show in the results. For more information on how to enable and disable modules for the classic global search, please refer to the Admin Configuration section in this documentation.

If your search results return more than five records for a specific module, you will see a link stating how many more results there are for your search in the specified module. Click on that link to view those additional results.

Alternatively you can click on the "x" in the search box to clear the search and start over.

You can perform a multiple word search in the classic global search. Sugar classic global search assumes an "and" operator between the words being searched. For

example : A search for "Robert Smith" will look for records that match "robert" and "smith". In this case, the Robert Smith lead and contact will be returned. A search for "Jim Smith" will look for records that match "jim" and "smith". In this case the Robert Smith lead and contact will not be returned as the "jim" search would not match these records.

Wildcards

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

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

Note : Classic global search automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to pull up all records that include the keyword entered in the search. If performing a multiple word search, the wildcard is only appended to the last word, not all words.
Use the following as examples to search using wildcards in classic global search in Sugar:

Search Criteria	Would Match	Would Not Match
rob	Rob, Robert, Robin	Bob, Jacob, problem
%bert	Albert, Bert, Robert	Bart
r_b	Robert, Ruby	Bob, Raab
%s_i	Dustin, Christi, Smith	Sophie, Josephine
__it	Fritz, Smith	Rita, Schmitt
r_b% smit%	Robert Smith, RobSmite	Bob Smith, Robert Phillip
rob smit	Rob Smith, Rob Smite	Robert Smith, Robert Smite

Preview

Classic global search shows you the results of your search, but only shows you the module the record is in and the name on the record. You can select each individual record in the results to navigate to that record for more information. Alternatively you can use classic global search's preview feature.
Use the following steps to utilize the preview feature after performing a search in classic global search:

1. Hover over the name of the record you want to see more details of.
2. Click on the magnifying glass icon that shows up on the left side of the link.
3. A new popup window opens with more details about the record you selected.

4. The fields shown are the fields that were included in the search and the matched characters will be highlighted for each field. If you are not sure why a result is being shown, clicking the preview should show you the exact field in the record that was matched by your criteria.
Note : The highlighting does not work with wildcard searches.
5. Click the magnifying glass icon on a different record to pull the results of that record or alternatively click the X to close the preview.

Show All

Click the Show All link at the bottom of the results window to see all of the results from your search. This provides a better picture of your results as well as more fields from each result and the ability to sort the results within their modules.

Each module enabled for classic global search will be displayed with a subpanel of the results from your search. If there are no results in a specific module for your search, in place of the subpanel will be a message that says "-- No Results --". From each module's subpanel you have the ability to:

- Filter out modules via the Advanced Option. For more information on how to filter out modules in the advanced search, please refer to the Advanced Options section in this documentation.
- Sort the records in the subpanel by clicking on the column headers
- Navigate through multiple pages using the paging buttons on the top right
- Navigate directly to the record being shown by clicking on the name of the record
- Launch the Quick Create form to edit the record by clicking on the pencil icon to the left of the record name

For more information on how to utilize the features of subpanels, please refer to

the [User Interface](#) documentation in the Application Guide.

Admin Configuration

Sugar administrators have the ability to globally enable and disable modules for the classic global search. A globally disabled module will not be included in the results of a classic global search and will not be available in the list of modules for users to enable and disable in the advanced search section.
For more information on how to enable and disable modules for classic global search, please refer to the [Enabling Modules for Global Search](#) section in the System Administration documentation.

Advanced Options

The Advanced Options screen is available on the all results screen of the classic and FTS global searches. This screen gives you the ability to enable or disable specific modules for your login.
Use the following steps to filter out modules in the all results screen of the global search:

1. Click the Advanced link to display the modules filter.

2. Drag any modules you wish to disable from the left panel to the right panel and then click the Search button in classic or the Save button in FTS.

3. The modules in the disabled panel will no longer show in your results. To re-enable a module simply drag it back to the enabled panel on the left and click search.
Note : Modules in the disabled panel are disabled only for the currently logged in user and will affect any future classic or FTS global searches until the module is re-enabled.

Sugar administrators have the ability to globally enable and disable modules for the global search. If the administrator globally disables a module, you will not be able to search that module or see it in the advanced search module filters. For more information on how to globally enable and disable modules, please refer to the [System](#) documentation in the Administration guide.

Module Search

Almost every module in Sugar has a list view with basic and advanced search functionality to help you find records easily and effectively in a module specific manner. These module-specific searches differ from global search in that you search by specific fields in a specific module, instead of across your entire Sugar database.

Much like global search, module search has the ability to use wildcards and automatically appends a wildcard character (%) to the end of your search phrase. For more information regarding using wildcards in module searches, please refer to the Wildcards section in this documentation.

Basic Search

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

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

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

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

Administrators can configure what fields appear on the Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Advanced Search

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

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

Advanced search allows users to perform ranged searches on certain date or numeric fields. Ranged search fields include a dropdown to select the type of predefined search including the following options:

- Date Fields : Equals, Last 7 Days, Last Month, Is Between, etc.
  Depending on the option selected, there will be zero (e.g. Last 7 Days, Next 7 Days, etc.), one (e.g. Equals, Not On, etc.), or two (e.g. Is Between) input boxes to search on.

- Numeric Fields : Equals, Greater Than, Less Than, Is Between, etc. Depending on the option selected, there will be one (e.g. Equals, Ddoes Not Equal, etc.) or two (e.g. Is Between) input boxes to search on.

Fields can be enabled or disabled to allow range searches via Admin > Studio. For more information on how to enable or disablerange searches on a field, please refer to the [Studio](#) documentation in the administration guide.

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

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

Layout Options

Sugar gives users the ability to personalize the list view of each module through the advanced search layout options feature. Users can pick which fields are

displayed in the list view, the order they are displayed in, and which column the records are ordered by.

Use the following steps to personalize the list view for a module using the layout options from the advanced module search:

1. Click on the Layout Options link to expand the available options below.

2. Select any column name in the Display Columns panel and click the right aligned arrow to remove the column from the list view.

3. Alternatively, select any column name in the Hide Columns panel and click the left aligned arrow to add a column to the list view.

4. Select any column name in the Display Columns panel and click the up or down aligned arrow to move a column left or right respectively in the list view.

5. In the Order By column dropdown, select a field to order your results by. Only columns in the Display panel will be available to order by and some columns (e.g. Email Address) are not available for sorting.
6. Select a direction you wish to order the fields by: Ascending : 1-10, A-Z; Descending : 10 -1, Z-A

Note : Clicking on a column header in the list view will temporarily override the sort selected here. In order to order by the selection made here again, simply click the Search button.
7. Click Search to execute the search.

Not all columns in each module can be used in the layout options by default. If there is a column you desire to add to your list view or order by, please contact your Sugar administrator to enable the desired fields. For more information on how to add or remove fields as options in the layout options section, please refer to the Studio documentation in the Administration guide.

Note : The layout options configured here supersede the default list view settings configured in Studio for the specified module.

Sugar remembers the last search run when you return to each module including whether or not the Layout Options panel was exposed. After changing your layout options, click "Layout Options" again to hide the expanded panel and click Search. Running a search locks in place whatever options you currently have on the search screen. Now the next time you run a search, the new options will be remembered and the Layout Options will be hidden. Click the Clear and the Search buttons to revert back to the default layout options.

Saved Search

Sugar gives users the ability to save any layout option changes and search criteria for easy access to perform the same search at a later time. A common example of this would be a manager saving a search where only his or her employees are the Assigned Users on the record. This way, the manager can review all of their team's records at the click of a button. You can save an unlimited number of search results and the Saved Searches dropdown displays the last saved search at the top of the list.

Note : Saved searches are user specific and can not be seen or shared by other users.

Use the following steps to save a personalized search from the advanced module

search:

1. Enter in any number of search criteria you desire.
2. Enter in a name to designate the search into the "Save search as" textbox and click save,

   Note : Any layout option changes made will also be saved with the saved search.
3. The search is saved and executed. You now have the ability to modify any search criteria or layout options. After any necessary modifications are made click the Update button next to "Modify current search".

   Note : The name of the search you will be updating shows below the Update button.
4. There is no way to modify the name of a saved search. Alternatively you can execute a saved search, enter a new name into the "Save search as" textbox and click save. This will create a new saved search with the same criteria as the original with the new name. You may then proceed to delete the old saved search.
5. To execute a previously saved search, simply select the desired search from the "Saved Searches" dropdown.
6. This immediately executes the saved search.
7. If you wish to remove a saved search, simply click the Delete button after executing a previously saved search.

   Note : The name of the search you will be deleting shows below the Delete button.

AND vs OR

When searching in the Basic or Advanced module search, Sugar uses the "and" operator, not "or". This means that if you are searching against multiple fields, Sugar will place an "and" in between each search field returning only records matching all of your search criteria. For example : A search performed for a record name "sugar" and the "My Items" check box will only return records where the

record name contains "sugar" and the assigned to field is the user currently logged in.

The only time Sugar will use the "or" operator is when using the mutiselect options in the search criteria. For example : A search performed in the Accounts module for the industry field will allow you to select multiple options to search by. Performing a search on the industry field with Apparel, Banking, and Chemicals selected will return any records where industry is "Apparel" or "Banking" or "Chemicals".

If any other field is added into the search criteria the operators between the

industry field and any other field will remain an "and" operator.

Wildcards

Wildcards can be used to search for criteria without including the entire word in the search. Use a wildcard character in place of characters you do not require in your search. Use may use any number of wildcard characters in any combination you desire. The following wildcard characters can be used in the basic and advanced module search in Sugar:

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

Note : Module search automatically appends the wildcard character (%) to the end of your search phrase for each text field. This allows the system to pull up all records that include the keyword entered in the search. If performing a multiple word search, the wildcard is only appended to the last word, not all words. Use the following as examples to search using wildcards in module search in Sugar:

Search Criteria	Would Match	Would Not Match
rob	Rob, Robert, Robin	Bob, Jacob, problem
%bert	Albert, Bert, Robert	Bart
r_b	Robert, Ruby	Bob, Raab
%s_i	Dustin, Christi, Smith	Sophie, Josephine
__it	Fritz, Smith	Rita, Schmitt
r_b% smit%	Robert Smith, RobSmite	Bob Smith, Robert Phillip
rob smit	Rob Smith, Rob Smite	Robert Smith, Robert Smite

Note : If you are doing a search on a text field your search may unintentionally be too narrow. Sugar will try to match your text to the beginnings of your record's field. So, if an account's name starts with an article like "A" or "The," this must be accounted for by adding a wildcard (%) at the beginning of your text. If your account name is "The Account," you can search for "%account" to retrieve any record that has the word "account" in the name.

Search Memory

Sugar by default automatically saves your most recent search criteria when leaving the module then repopulates the search fields the next time you return. For example: Perform a search in the Accounts module for "sugar". Navigate away from the Accounts module and then return back to the Accounts module. The search for "sugar" will automatically be shown and the relevant results will be shown below in the list view.
Note : This can be an unintended result if a user is unaware of this functionality. For example: A search may have an assigned user selected that is not currently visible in the scrolling selection box. When running a new search, best practice is to click the Clear button before entering your search criteria.
Module search memory can be set to one of the following options:

- Remember last search : This is the default behavior in Sugar
- Populate only : This will populate the search criteria, but will not execute the search.
  Note : This is recommended for systems experiencing performance issues.
- Do not remember last search : Search will be cleared and executed every time the search is loaded

Note : These options are global settings and will affect all users. Please be sure to inform users of any behavior change before making modifications.

Admin Configuration

A Sugar administrator has many options for configuring module search. You have the ability to add, remove, and order fields on either the basic or advanced search layouts through Admin > Studio. For more information on how to change the basic and advanced search layouts, please refer to the [Studio](#) documentation in the Administration guide.
The module search results are controlled through the list view layout in Admin > Studio. Here you can also control the possible fields a user can add to their personalized list view. For more information on how to change the list view layout, please refer to th e [Studio](#) documentation in the Administration guide.

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Home

Overview

The Home page displays a collection of dashlets which allow users to get a quick view of assigned records, activities, reports, etc. to help users quickly access the information that is most critical in their daily use of Sugar. Every user in Sugar can configure their dashlets based on the display options and filters available from their Home page. This documentation will go over the basics of the Home page as well as the various options available to customize the Home page to best fit your individual needs.

Home Page Tabs

Sugar's Home page displays four Home page tabs ("My Sugar", "Sales", "Marketing", "Support") by default. The Home page tab is where certain dashlets are grouped together based on the information that users would like to view under each tab. Users can modify the dashlets that appear under each Home page tab, change the tab names, as well as add new tabs if they wish.

Default Home Page Tabs

The default Home page tabs that come out-of-the-box with Sugar are as follows:

- My Sugar : This tab displays module specific dashlets such as "My Accounts", "My Leads", "My Calls", etc. that show records assigned to the user by

default. For more information on module dashlets, please refer to the
[Modules](#) section of this documentation.

- Sales : This tab displays pre-defined sales-related dashlets such as "My Top
  Open Opportunities", "My Pipeline", etc. There will be a combination of
  module and chart-type dashlets displayed under this tab providing you with
  information specific to your sales opportunities in Sugar.
- Marketing : This tab displays pre-defined marketing-related dashlets such as
  "Leads By Lead Source", "Campaign ROI", etc. You can use this tab to group
  all dashlets that would provide key marketing data for your organization.
- Support : This tab displays pre-defined support-related dashlets such as "My
  Open Cases", "Open Cases By Month By User", etc. The various module and
  chart-type dashlets under this tab allows you to track and manage all your
  open cases in Sugar.

Renaming Home Page Tabs

Users can change their Home page tabs to display different names if they wish.
Please note that administrators can restrict users from modifying their Home page
layouts, which will prevent renaming of Home page tabs . For more information on
how administrators can prevent Home page customizations, please refer to the
[Admin-Set Limitations](#) section of this documentation.

The following steps cover renaming the My Sugar tab as an example:

1. Navigate to the Home page by clicking the Sugar cube icon on the upper left.
2. Double click on the My Sugar home page tab.

3. Enter the new name in the text field (e.g. "My Sugar Records").
4. Click outside of the Home page tab to save the change.

Adding Home Page Tabs

Users can add new tabs to the Home page as well if they wish to group a different set of dashlets together outside of the default tabs. Please note that administrators can restrict users from modifying their Home page layouts, which will prevent adding of Home page tabs. For more information on how administrators can prevent Home page customizations, please refer to the Admin-Set Limitations section of this documentation.

The following steps cover adding a new Home page tab called "Team" with two columns as an example:

1. Click the Plus sign icon to the right of the default Home page tabs.

2. Enter in the name for the new Home page tab then select the column layout you desire to display the dashlets.

3. Click "Submit" and the new Home page tab will be displayed as the last tab.
   - You can add dashlets to the new Home page tab to display information you wish to view. For more information on how to add dashlets, please refer to the Adding Dashlets section of this documentation.

Changing Home Page Layout

Users can change the number of columns that dashlets are displayed on the Home page depending on how they wish to view the information. You can set the Home page to display one dashlet at a time or up to three at once. Please note that administrators can restrict users from modifying their Home page layouts. For

more information on how administrators can prevent Home page customizations, please refer to the [Admin-Set Limitations](#) section of this documentation.

The following steps cover changing the Home page layout to display three columns as an example:

1. Navigate to the Home page by clicking the Sugar cube icon on the upper left.
2. Click "Change Layout" on the top right hand corner of the Home page.

3. Select the box with three columns.

4. The Home page will now display the dashlets across three columns.

Commonly Used Dashlets

By default each of the Home page tabs will display stock dashlets such as "My Calls", "My Meetings", "My Pipeline", "My Open Cases", etc. The following sections will go over some commonly used dashlets that can be viewed and managed on your Home page.

Module Dashlets

There are numerous stock module dashlets that come out-of-the-box with Sugar. Dashlets such as "My Leads", "My Accounts", "My Calls", "My Meetings" are displayed on the Home page by default and are commonly used among Sugar users. All of the module dashlets are displayed under the Modules tab of the Add

Sugar Dashlets window and they show records specific to the module that are assigned to the users by default. Please note that these module dashlets can easily be renamed and configured to pull relevant sets of data that you wish to view. For more information on how to configure the dashlets, please refer to the Configuring Dashlets section of this documentation.

My Activity Stream

The My Activity Stream dashlet is designed to allow team members to view each other's activities and the actions that took place related to the Cases, Contacts, Leads, or Opportunities module. The dashlet displays up-to-date notifications whenever a new contact, lead, etc. is created by a team member. In addition to record creation notifications, users can view status updates when a lead is converted as well as when team members close a case or opportunity in Sugar. Please note that you will only be able to view and post activity feeds for teams that you are associated with in Sugar. The My Activity Stream dashlet is displayed by default under the My Sugar Home page tab.

Administrators in Sugar have the ability to disable the My Activity Stream dashlet via Admin > Activity Streams as well as activate the feeds for all or some of the modules (Cases, Contacts, Leads, Opportunities). For more information on activity stream settings, please refer to the Activity Streams section of the System documentation in the Administration guide.

You can post status updates in the dashlet by entering it in the open text field at the top of the My Activity Stream dashlet then clicking "Post". Click the double arrow to the left of your name within the My Activity Stream dashlet and this will display options to add external links, images, and YouTube videos as well as specify the team who can view your posts. To post external links, images, or YouTube videos, simply select one of the options (Image, Link, YouTube) in the dropdown list and enter in the corresponding URL. Please note that these posts will only be viewable by members of the team (e.g. West, Global, etc.) you select in the Visible to Team field. You can reply to posts made by your team members by clicking the Reply link to the right of each post. All of your personal posts will display the Delete link as well allowing you to delete any unnecessary posts. Please note that if the Show Full Names checkbox is selected in your user preferences, your full name will be displayed on your posts instead of your assigned user name. For more information on setting your user preferences, please refer to the Getting Started documentation.

Administrators in Sugar have the option to disable user feeds via Admin > Activity Streams, which will prevent users posts from being displayed on the My Activity Stream dashlet. For more information on activity stream settings, please refer to the Activity Streams section of the System documentation in the Administration guide.

Example: If we post a link to the SugarCRM website along with a message for everyone on the Global team to check it out, the message including the link will be visible to all users on the team.

Please note that organization's with a corporate Twitter and Facebook account can view their feeds in the My Activity Stream dashlet. Administrators in Sugar must configure the Facebook and Twitter connectors first via Admin > Connectors in order for users to view the feeds on the dashlet. For more information on how to configure the connectors, please refer to the [Connectors](#) section of the System documentation in the Administration guide.

Adding Dashlets

Additional dashlets can be added by clicking "Add Sugar Dashlets" on the top right hand corner of the Home page. If you would like to add the dashlet under a specific Home page tab, select the tab ("My Sugar", "Sales", "Marketing", etc.) prior to clicking "Add Sugar Dashlets". In the Add window, you will see the various types of dashlets associated to the Modules, Charts, Tools, and Web tab that you can select. To add a dashlet, simply click the specific dashlet in the Add window and it will automatically add it to the top of the first column of your current Home page tab. Please note that you can also add the same dashlet multiple times with different configurations to show different records or information. By default, fifteen is the maximum number of dashlets that users can add to any one Home page tab. Administrators have the ability to increase or decrease the number of dashlets allowed via Admin > System Settings. Administrators can also restrict users from modifying their Home page layouts, which will prevent adding dashlets. For more information on how administrators can increase the maximum number of dashlets allowed or prevent Home page customizations, please refer to the [Admin-Set Limitations](#) section of this documentation.

Dashlet Types

When you click "Add Sugar Dashlets", the pop-up Add window will display the Modules, Charts, Tools, and Web tab which house the various dashlet types. You can also search for dashlets by entering the relevant term in the Find Sugar Dashlet search box and clicking "Search". Please note that the search is only performed within the specific tab ("Modules", "Charts", "Tools", "Web") you are

currently in. The following will cover key features of dashlet-types found under each tab that can be added to your Home page.

Modules

The Modules tab consists of various pre-defined module dashlets such as "My Accounts", "My Calls", My Contacts", etc. All of the dashlets under this tab display records that are specific to the module assigned to the user by default.

For example, the My Accounts dashlet will show all account records assigned to you along with some key information (e.g. Name, Phone, etc.) on the list view display column. You can scroll through the pages on the list view to view the set of records by clicking the Next, Previous, First, or Last button. Each results page will show a set number of records depending on the number of display rows (1, 3, 5, 10) you choose to show per page. Please note that you can configure the dashlets by clicking the Edit icon to filter and display only relevant data that you wish to view. For more information on how to configure the dashlets, please refer to the Configuring Dashlets section of this documentation.

Charts

The Charts tab displays seven pre-defined report charts (e.g. "My Pipeline by Sales Stage", "Campaign ROI", "All Opportunities by Lead Source", etc.) under "Basic Charts". These pre-defined charts allow you to view sales and opportunities related data for your organization. You also have the option to add custom report charts as dashlets by selecting the saved report under "Report Charts". For more information on how to view report charts via dashlets, please refer to the Viewing Via Dashlet section of the Reports documentation. Please note that all report types (Summation Report, Matrix Report, Summation with Details Report) except for Rows and Columns-type reports have the chart option available to view as dashlets.

You can click the Edit icon to change the title and filter the pre-defined charts based on the available edit options. Unlike the pre-defined charts, the custom report charts take you directly into the reports detail view to edit the report. For more information on how to edit reports, please refer to the Reports documentation.Once you save the edited report, you will have to refresh the dashlet in order for the data to be updated and displayed properly on the chart.

The available charts under the Basic Charts option are as follows:

- All Opportunities By Lead Source By Outcome : This is a horizontal stacked bar chart that displays total opportunities for each lead source. Each colored bar represents the different sales stage and the outcome proportions for that particular lead source.

- All Opportunities by Lead Source : This is a pie chart that groups total sales opportunities by each lead source.
- Campaign ROI : This is a vertical bar chart that displays the return on investment (ROI) for a campaign. If you have multiple campaigns, you will have to click the Edit icon to select the specific campaign name to view the campaign's ROI. You can also view this chart by clicking the "View ROI" button in the campaigns detail view. For more information on campaign's return on investment, please refer to the Campaign documentation.
- My Closed Won Opportunities : This is a gauge chart that displays all your closed won opportunities with the sales stage of "Closed Won". The maximum gauge range value on the chart represents the total number of opportunities assigned to you. The chart is automatically divided into four equal ranges based on your total opportunity records.
- My Pipeline By Sales Stage : This is a funnel chart that displays the total dollar amounts for all your opportunities grouped by sales stage. The chart displays only when the expected close date of the opportunity is within the specified date range in the edit options . Please note that the funnel chart is ordered based on the order of the Sales Stage dropdown list in the opportunities edit view.
- Outcome by Month : This is a vertical stacked bar chart in which each bar displays the total sales pipeline by month. Each colored bar represents the different sales stages and the outcome proportions for the opportunities in the specific month.
- Pipeline By Sales Stage : This is a funnel chart that displays the total dollar amounts for all opportunities in Sugar grouped by sales stage. The chart displays only when the expected close date of the opportunity is within the specified date range in the dashlets edit options . Please note that the funnel chart is ordered based on the order of the Sales Stage dropdown list in the opportunities edit view.

There are various chart types (Horizontal Bar, Vertical Bar, Pie, Funnel, Gauge) that can be displayed as a dashlet on the Home page. Each distinctively colored area on a chart (except gauge chart) is linked to the data set that it represents. To view the set of records that make up the colored area on the chart, simply click the colored area to drill down to the specific group of records. You will be directed to the modules list view to view the set of records associated to the particular colored area.

Example: If we click the purple pie within the All Opportunities by Lead Source chart, it will drill down to the related set of records that make up opportunities with lead source "Public Relations". The set of opportunity records that make up the $95,000 will be displayed in the opportunities list view for you to view the record details.

All Opportunities by Lead Source

Tools

The Tools tab allows you to add dashlets such as "My Activity Stream", "Team Notices", "Jot Pad", etc. and the following sections will go over the key features of each dashlet-type.

Invaders : The Invaders dashlet is a game you can play directly on your Home page if you ever need a little break. To play the game, simply use the letters "A" and "D" on your keyboard to move the tank left-to-right then hit "S" to shoot the sugar cubes at the alien ships.

My Activity Stream : The My Activity Stream dashlet is designed to allow team members to view each other's activities and the actions that took place related to the Cases, Contacts, Leads, or Opportunities module. The dashlet displays up-to-date notifications whenever a new contact, lead, etc. is created by a team member. In addition to record creation notifications, users can view status updates when a lead is converted as well as when team members close a case or opportunity in Sugar. Users can post status updates and include external links, images, or YouTube videos to notify and share relevant information with their team members. Please note that the My Activity Stream dashlet is displayed by default under the My Sugar Home page tab. For more information about the activity stream dashlet, please refer to the My Activity Stream section of this documentation.

Team Notices : The Team Notices dashlet displays team-specific announcements posted by the administrator. These announcements display as a scrolling marquee within the dashlet to be viewable by members of the specified team via their Home page. Please note that only administrators have the ability to create and manage team notices in Sugar. For more information on how to create team notices, please refer to the Team Notices section of the Team Management documentation in the Administration guide.

Jot Pad : The Jot Pad dashlet displays an open text area on the Home page where you can jot down notes, tasks, etc. that you would like to keep a reminder of in Sugar. Double click within the text area to start typing your note. You can click the Edit icon to change the title and height of the dashlet.

Sugar News : The Sugar News dashlet keeps you up-to-date with the latest news regarding SugarCRM. The news on the dashlet feeds directly from SugarCRM's corporate website (http://www.sugarcrm.com/crm/product/news). Please note that the Sugar News dashlet is displayed by default under the My Sugar Home page tab. You can click the Edit icon to change the title or the dashlet height per your preference.

Web

The Web tab allows users to add external websites and news feeds to view as dashlets on their Home page. You simply need to enter in the corresponding URL under "Website" or "News Feed" then click the Add button beneath it. The Website dashlet allows you to view and navigate through the corresponding URL site directly from your Home page. You can also view RSS or Blog feeds (e.g. http://www.sugarcrm.com/crm/product/news) from your Home page by adding the News Feed dashlet.

Example: If we enter in http://sugarcrm.com under "Website" and click "Add", this will display Sugar's website as a dashlet on the Home page. You can view the website directly on your Home page now and can navigate through the site. You can also click the Edit icon to change the title or dashlet height to fit your personal preference.

Steps to Add a Dashlet

Occasionally users may need to add more dashlets to their Home page if they wish to view additional information regarding their records, sales, cases, etc. Please note that some dashlets may require you to reload the page to display the dashlet properly.

The following steps cover adding the My Accounts dashlet under the My Sugar tab as an example:

1. Navigate to the Home page by clicking the Sugar cube icon on the upper left.
2. Select the My Sugar tab.
3. Click "Add Sugar Dashlets" on the top right hand corner of the Home page.

4. In the Add window, select "My Accounts".

5. The My Accounts dashlet will be displayed on your Home page.
   ○ To configure the dashlet, click the Edit icon at the top of the dashlet menu bar. For information on how to configure the dashlet, please refer

   to the [Configuring Dashlets](#) section of this documentation.

Rearranging Dashlets

By default, new dashlets are automatically added to the top of the first column on the Home page, which pushes the existing dashlets below the new one. Since this does shift the dashlets location on the Home page, users have the option to rearrange the dashlets to place them in different positions per their viewing preference. Please note that administrators can restrict users from modifying their Home page, which will prevent rearranging of dashlets. For more information on how administrators can prevent Home page customizations, please refer to the [Admin-Set Limitations](#) section of this documentation.

The following steps cover moving the My Calls dashlet underneath the My Accounts dashlet as an example:

1. Click the My Calls dashlet's menu bar.
2. Drag and drop the dashlet underneath the My Accounts dashlet.

Configuring Dashlets

Dashlets on the Home page can easily be configured to display specific information users want to view. Simply click the Edit icon at the top of the dashlet menu bar and this will display the pop-up Options box with display options and filters available to configure the dashlet. Please note that Sugar administrators have the ability to edit the dashlet's filter and display layouts using Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Edit Options

To configure the dashlet, users will need to click the Edit icon at the top of the dashlet menu bar, which will display the pop-up Options box with various display options and filters to make the changes. The following sections will cover the various options available in the Edit Options box along with the settings to configure your dashlet.

General

The General section of the Options box allows you to configure how your dashlet

will display on the Home page:

- Title : Change the displayed name of the dashlet.
- Display Rows : Specify how many rows or results this dashlet will display at once. Please note that the maximum is ten rows.
- Auto-Refresh : Choose a time frame to have the dashlet query automatically refresh.
- Display and Hide Columns : Use the left and right arrows to move fields between these two lists to determine which fields will be shown in the dashlet. Use the up and down arrows to change the left-to-right order of the displayed columns. A maximum of six columns can be displayed within any dashlet.

Filters

The Filters section will allow you to filter your dashlet based on fields made available by the administrator via Studio. The fields available for filtering each dashlet type will vary based on these Studio changes. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

The following will cover the most common Accounts filters as an example:

- Only My Items : Select this box to only display records assigned to yourself.
- Date Created : Only show records created within this time frame.
- Billing Country : Enter a billing country to only show records with a matching country name.
- Multiselects : To only include records of certain Types, Industries, Teams, or Assigned Users, choose the desired values in each category. To select multiple desired values, hold the control or command key while clicking. Please note that if "Only My Items" is checked, that setting will override any attempts to select alternate values in the Assigned User field.

Steps to Configure a Dashlet

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

The following steps cover updating the title, display columns, status filter, and start date filter for the My Calls dashlet as an example:

1. Click the Edit icon at the top of the dashlet menu bar.

2. Change the "Title" and the "Display Columns" in the General section of the Options box.
   ○ Use the left and right arrows to move fields between the Display and Hide columns to determine which fields will be shown in the dashlet.

3. Update the "Status" and the "Start Date" in the Filters section of the Options box.

4. Once the update is complete, click "Save" and the dashlet will reflect the changes made.

Deleting Dashlets

Users can delete dashlets they no longer wish to view on their Home page by clicking the Delete icon. Please note that deleted dashlets are not permanently removed and can be added back by clicking "Add Sugar Dashlets" on the top right hand corner of the Home page. For information on how to add dashlets to the Home page, please refer to the Adding Dashlets section of this documentation. Administrators can also restrict users from modifying their Home page layouts, which will prevent deleting of dashlets. For more information on how administrators can prevent Home page customizations, please refer to the Admin-Set Limitations section of this documentation.

The following steps cover deleting the My Top Open Opportunities dashlet from the Home page as an example:

1. Navigate to the Home page by clicking the Sugar cube icon on the upper left.
2. Click the Delete icon at the top of the dashlet menu bar.

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

Refreshing Dashlets

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

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

Users can schedule the dashlet to automatically refresh using the Auto-Refresh option. Click the Edit icon at the top of the dashlet menu bar and this will display the pop-up Options box. You can select the interval for the refresh in the Auto-Refresh dropdown list. Please note that you can schedule each of the dashlets to refresh at different intervals.

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

Reset Homepage

As users make customizations to their Home page, there may be times when they may want to revert all changes made and start fresh. Users can easily reset their Home page back to the default out-of-the-box layout, which will allow users to re-do all customizations.

Use the following steps to reset the user's Home page:

1. Navigate to your user profile by choosing it from the system links in the upper right of Sugar.

2. Click the Reset Homepage button to revert back to the default layout.

Admin-Set Limitations

Users may find that some of the options described in this documentation (e.g. adding and moving dashlets) are not available when configuring their Home pages. Please note that administrators in Sugar have the ability to limit how users may modify their dashlets via Admin > System Settings. Reach out to your system administrator if you are not able to customize your Home page or would like to

increase the maximum number of dashlets allowed per Home page tab. Keep in mind that the changes made in Admin > System Settings will be systemwide and cannot be done on an individual account basis. For more information on system settings, please refer to the [System](#) documentation in the Administration guide.

- Prevent user customizable Homepage layout : Prevents users from adding or moving dashlets. Users may still configure their dashlet filters and field layouts.
- Maximum number of Sugar Dashlets on Homepage : Sets a maximum number of dashlets that users may add to any one Home page tab.

Prevent user customizable Homepage layout:	☐
Maximum number of Sugar Dashlets on Homepage:	15

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Leads

Overview

Sugar's Leads module consists of individual prospects who may be interested in a product or service your organization provides. Once the lead is qualified as a sales opportunity, leads can be converted into contacts, opportunities, and accounts. There are various ways you can create leads in Sugar such as via the Leads module, duplication, importing leads, etc. Once the lead record is created, you can view and edit information pertaining to the lead via the Leads detail view. This documentation will go over the basics of the Leads module as well as the various options available in performing the actions related to the module.

Lead Fields

The Leads module contains a number of stock fields which come out of the box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged to best meet your organization's needs. Users with administrator or developer access have the ability to alter, remove, or add fields via Admin > Studio. For more information on adding or modifying fields, please refer to the [Studio](#) documentation in the Administration guide.

Field	Description

Account Description	A description or other information about the lead account
Account Name	The account to which the lead belongs Note: Unlike the Contacts module, the Account Name field is not a relate field in the Leads module. When you convert the lead, you will have the option to create the account as a related record.
Assigned to	The Sugar user assigned to the lead
Assistant	The name of the lead's assistant within his or her company
Assistant Phone	The assistant's phone number
Birthdate	The lead's date of birth
Campaign	The campaign, if any, from which the lead originated
Converted	Indication that the lead has been converted to a contact
Date Created	The date the lead record was created
Date Modified	The date the lead record was last modified
Department	The lead's department within their company
Description	A description or other information about the lead
Do Not Call	Indication that the lead should not be called
Email Address	The lead's email address
Fax	The lead's fax number
First Name	The lead's first name
Home Phone	The lead's residence number
Last Name	The lead's last name
Lead Source	The source from which this lead originated
Lead Source Description	A description or other information about the lead source
Mobile	The lead's mobile number
Name	When viewing, the lead's full name

Office Phone	The lead's office number
Opportunity Name	The opportunity name associated with the lead
Other Address	The lead's alternate address (e.g. billing, shipping)
Other Phone	The lead's alternate phone number
Primary Address	The lead's primary address
Referred By	The name of the individual or organization that referred the lead
Salutation	Standard greeting for the lead (e.g. Mr., Ms., Mrs., etc.)
Status	The current status of the lead
Status Description	A description or other information about the lead's status
Teams	The Sugar team(s) assigned to the lead record
Title	The lead's business title
Transaction Amount	The expected transaction amount for the potential business with the lead
Website	The website URL associated with the lead's organization

Leads Module Tab

The Leads module tab is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access the Leads list view. You may also hover on the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of leads you last viewed in the module. The Favorites menu displays the list of leads you most recently marked as favorites in the module.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Lead	Opens the edit view layout to create a new lead
Create Lead From vCard	Imports a vCard file from your computer to create a new lead
View Leads	Opens the list view layout to search and display leads
View Lead Reports	Displays existing reports based on the Leads module
Import Leads	Opens the import wizard to create or update leads using external data

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

- The top navigation bar may be filtered based on a specific tab grouping (e.g. Activities, Reports, etc.) of which the Leads module is not a member. Click the More tab (last tab on navigation bar) then hover on "Filter Menu By" to check how the navigation bar is grouped. For more information on tab grouping, please refer to the User Interface documentation.
- The Leads module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Leads module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Leads module for your entire Sugar instance. Reach out to your Sugar administrator to have the Leads module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

Creating Leads

There are various methods for creating leads in Sugar including via the Leads module, quick create, vCard, duplication, emails, importing leads, and web-to-lead form. The full edit view layout opens when creating the lead directly from the Leads menu and includes all of the relevant fields for your organization's leads. The quick create form is a shortened version of the leads edit view and typically contains fewer fields. Both the Edit View and Quick Create layouts can be

configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#) documentation in the Administration guide.

Creating Via Leads Module

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

1. Hover on the Leads module and select "Create Lead".

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

Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also quick create a lead from any Leads subpanel on related module records.
Use the following steps to create a lead via Quick Create:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Lead" or select "Create" on any Leads subpanel on a related module's detail view.
   From Quick Create menu:

From subpanel:

2. Enter appropriate values in the [fields](#) in the quick create form. All required fields are marked with a red asterisk and must be completed prior to saving

3. If additional fields are desired, click the Full Form button to use edit view instead.

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

Creating Via vCard

vCards are electronic business cards that are exchanged through applications such as email and web browsers. In addition to allowing leads to be [saved as vCards](#) for use in other software, you can also generate a new Sugar lead from a vCard.

Use the following steps to create a lead in Sugar via vCard:

1. Hover on the Leads module and select "Create Lead From vCard".

2. Choose the vCard file from your computer and click "Import vCard".

Creating Via Duplication

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

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

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

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

Creating Via Emails

The Emails module enables users to create new lead records from external and imported emails using the Quick Create option. Simply click the Quick Create button above the selected email header then select "Lead".

A pop-up window will open with the quick create form where you can enter relevant values for the new lead. The name, email address, and description fields are populated by default based on the emails subject, body, etc. All required fields are marked with a red asterisk and must be completed prior to saving.Once the necessary information is entered, click "Save". For more information on how to create, send, and manage emails, please refer to the [Emails](#) documentation.

Please note that the selected email will be imported, if not already, and automatically related to the new lead. The email record will appear within the History subpanel of the Leads detail view.

Importing Leads

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

Use the following steps to import leads via the Import Leads option:

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

2. In Step 1, select the source of the data you are importing. Click "Next".
3. In Step 2, select the import file and choose "Create new records only". Click "Next".
4. In Step 3, confirm the import file properties. Click "Next".
5. In Step 4, confirm the field mappings for the import. Click "Next".
6. In Step 6, view the import results.
   - The Created Records tab will show all of the new lead records.
   - The Duplicates tab will show any records in the file that were identified

- as duplicates of existing records and thus not imported.
  - The Errors tab will show records that were not imported due to errors detected during import.

Creating Via Web-to-Lead Form

Sugar provides a simple way to allow visitors to your website or other online location to become leads in your Sugar instance. You can create a web-to-lead form in Sugar and place the form on an external website. Then when a visitor to your site completes and submits the form, their information is entered into Sugar as a new lead record. For more information on creating and managing web-to-lead forms, please refer to the [Web-To-Lead Forms](#) documentation.

Viewing Leads

There are various options available for viewing lead records in Sugar including via Leads list view, Leads detail view, Leads Recently Viewed menu, dashlets, and reports. Please note that you will only be able to see lead records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide.

Viewing Via List View

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

Viewing Via Detail View

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

Viewing Via Recently Viewed

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

Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets which allow users to get a quick view of various records, activities, reports, etc. You can view lead information in lead-based dashlets such as "My Leads" as well as in dashlets based on other modules such as "My Calls". Clicking a lead's name from any dashlet will open the lead in detail view. For more information on using dashlets and viewing lead records via dashlets, please refer to the Modules section of the Home documentation.

Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding leads and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the lead record's detail view by clicking the lead's name in the report results. Please note that you can only directly access lead detail views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the [Reports](#) documentation.

In addition to navigating to the Reports module and finding or building relevant reports, you can use the Lead module tab's View Lead Reports option to see all lead-based reports to which you have access.

Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the [Role Management](#)documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

Searching Leads

The Leads list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is

performed, the relevant results will be displayed in the Leads list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.

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

Basic Search

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

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

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Items : Select this box to return only records assigned to you.
- My Favorites : Select this box to return only records you have marked as favorites.
- Open Items : Select this box to return only records with an open status (e.g. New, Assigned, In Process).

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Items" and enter a lead name, Sugar will only return lead records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all lead records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see

lead records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide.

Administrators can configure what fields appear on the Leads Basic Search via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Advanced Search

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

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

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

When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select "My

Favorites" and enter in a lead name to search, Sugar will only return lead records with a matching name that you have marked as favorites. When searching by a multiselect or dropdown field (e.g. "Assigned to"), however, Sugar will return records matching any of these selections.Once the search completes, the relevant results will populate in the [list view](#) below the search panel. To see all lead records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see lead records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#)documentation in the Administration guide.

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

Global Search

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

To use global search, you need to first enter the keyword into the search box. With Full Text Search enabled, pop-up results will begin appearing once you input three or more characters. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. When Full Text Search is not enabled, results starting with your keyword will appear after clicking the magnifying glass icon or hitting your Return/Enter key. For more information on using and configuring Global Search, please refer to the [Global Search](#) section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results. For more information on configuring your Global Search, please refer to the [Search](#) documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the [Field Options](#) section of the Studio documentation as well as the [Search](#) section of the System documentation in the Administration guide.

Leads List View

The Leads list view displays all lead records meeting the current search criteria to which your user has access. You can view the basic details of each lead within the field columns. Please note that you will only be able to see lead records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide.

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

Pagination

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

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

Checkbox Selection

You can perform several actions on lead records directly from the list view by first selecting the desired records. To select individual lead records on the Leads list

view, mark the checkbox on the left of each row. To select or deselect multiple lead records on the list view, use the options in the checkbox dropdown menu.

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

Actions Menu

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

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

Menu Item	Description
Delete	Delete one or more leads at a time
Email	Email one or more leads at a time
Mass Update	Mass update one or more leads at a time
Mail Merge	Perform a mail merge on one or more leads at a time Note: This option only appears when Mail Merge is enabled at the system level and under the user's profile.
Merge	Merge two or more duplicate leads

| Add to Target List | Add one or more leads to a target list |
| Export | Export one or more leads to a CSV file |

Favorite Designation

Users have the option to mark lead records as favorites via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Leads module tab. In the Lead's list view, the star on the left of each lead's row is yellow once marked to indicate a favorite lead. For more information on how to mark records as favorites, please refer to the Favoriting Leads section of this documentation.

More Information

Additional details for each lead can be viewed by clicking the "i" icon to the far right of each list view row. This provides users a quick view of additional lead information in addition to what appears in the display column fields. The resulting pop-up window will show the Primary Address, Mobile, Home Phone, Other Phone, Lead Source, and Description fields by default. The list of fields appearing here may only be configured through a code-level customization.

Column Sorting

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

refer to the Layout Options section of the Search documentation.

Leads Detail View

The Leads detail view displays thorough lead information including all lead fields which are grouped by default into the Overview, More Information, and Other panels. You can also view a lead's related records (Activities, History, Campaigns) which appear in subpanels beneath the lead fields. The detail view can be reached by clicking a lead record's link from anywhere in the application including from the Leads list view.

Please note that you will only be able to view a lead record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Actions Menu

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

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

Menu Item	Description

Edit	Edit this lead
Duplicate	Duplicate this lead
Delete	Delete this lead
Find Duplicates	Locate potential duplicates of this lead
Get Data	Search, view, and merge additional lead data via Hoover's and/or Zoominfo connector
Convert Lead	Convert a qualified lead into a contact, account, or opportunity
Manage Subscriptions	Manage this lead's campaign subscriptions
View Change Log	View a record of changes to this lead

Favorite Designation

Users have the option to mark lead records as a favorite via the detail view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Leads module tab. In the Leads detail view, the star on the right of the lead's name is yellow once marked to indicate a favorite lead.For more information on how to mark records as favorites, please refer to the Favoriting Leads section of this documentation.

Next or Previous Record

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

Subpanels

Beneath a lead record's fields are subpanels containing related records from various modules, campaign interaction history for this lead, and the lead's InsideView information.

Related Record Subpanels

Modules in Sugar display subpanels, which allow users to view related records from other modules. Users can view the details of the related record as well as relate new or existing records via the subpanel. Administrators can easily modify the fields (e.g. Name, Assigned User, etc.) displayed on these subpanels as well as the label of each subpanel through Admin > Studio so that users have visibility to the most important fields for their organization. For more information on working with related records subpanels, please refer to the Subpanels section of the User Interface documentation.

Activities and History Subpanel

The Activities subpanel lists open or upcoming tasks, calls, and meetings that are related to the lead record. Once the activities have taken place or are completed, they will instead appear within the History subpanel. The History subpanel also includes notes and emails associated with the lead record. For more information on the history and activities subpanel, please refer to the User Interface documentation.

Campaigns Subpanel

The Campaigns subpanel contains historical information regarding a lead record's interaction with all Sugar campaigns. When a mass marketing campaign is sent to a lead (or manually marked as sent in the case of non-email campaigns), the related campaign activity information will appear within the Campaigns subpanel. This information mirrors the "View Status" page available from within each individual campaign and shows activities such as when a campaign was sent, when the lead viewed the campaign message, when the lead clicked a tracked link within the campaign, etc. Since this subpanel contains historical campaign interactions for the lead, it cannot be used to associate a lead with a campaign or otherwise manage a campaign or target list. For more information on associating a lead with a campaign, please refer to the Adding Leads to a Target List section of this documentation. For more information on campaigns, please refer to the Campaignsdocumentation.

InsideView Subpanel

The InsideView subpanel, if you are an InsideView user, provides relevant company information, news, and social media insights within your lead's detail view. The InsideView subpanel will appear by default on the detail view. The panel can be minimized by clicking the double arrow next to "InsideView". For more information on viewing lead information via InsideView, please refer to the User Interface documentation. Administrators in Sugar also have the ability to disable InsideView for the entire instance so that it is not visible to users. For more information on disabling InsideView, please refer to the Connectors section of the System documentation in the Administration guide.

Editing Leads

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

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

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

Administrators in Sugar may configure both the Leads edit view and quick create via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

Editing Via Detail View

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

Editing Via List View

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

Editing Via Dashlets

You can edit leads by clicking the pencil icon to the far right of any leads-based dashlet on your Sugar home page. For example, clicking the pencil icon within the My Leads dashlet will open a pop-up window with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. For more information on dashlets, please refer to the [Home](#) documentation.

Editing Via Reports

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

Deleting Leads

If a lead record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Leads detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting lead records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

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

Deleting Via Detail View

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

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

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

Mass Deleting Via List View

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

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

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

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

Converting Leads

Sugar enables you to convert leads into contacts as you determine they qualify for your organization's definition of a contact (e.g. after an evaluation/qualification process or upon entering into business with the individual). When the lead is converted, a new contact record is created in Sugar with a relationship to the

original lead record. The Convert Lead page also gives you the option to create an account, opportunity, and activity (Calls, Meetings, Notes, Tasks) record. Please note that administrators have the ability to alter, add, or remove fields, as well as make modules on the Convert Lead page required via Admin > Studio. For more information on configuring the convert layout, please refer to the [Studio](#) documentation. If a module is set as required, the panel for the module(s) will automatically be open on the Convert Lead page and marked with a red asterisk. Required modules must be created or selected in order for the lead to be converted and saved.

Administrators also have the ability to create custom fields in the Leads module to automatically copy the field value to a field with the same name in the newly created record. Additionally, administrators can add any custom modules that have been installed or created in Sugar to the Convert Lead page. For more information on creating custom fields to copy data over to new records and adding custom modules to the Convert Lead page, please refer to the [Creating Fields](#) section and

Lead Conversion Options

The activities related to the lead can be copied or moved to the newly created record(s) during lead conversion depending on the lead conversion options selected by the administrator via Admin > System Settings. If either the copy or move option is selected, then the associated multiselect or dropdown field will be displayed at the bottom of the Convert Lead page.

The available lead conversion options are as follows:

- Copy : This option allows you to copy the leads activities to the new record for the module(s) selected in the multiselect field.
- Move : This option allows you to move the leads activities to the new record for the module selected in the dropdown field.
- Do Nothing : The lead's activities remain with the converted lead. The copy or move options will not be displayed on the Convert Lead page.

Please note that even if "Do Nothing" is selected, emails associated with the lead will still show under the created contact as long as the lead and contact share the same email address. This is because emails carry an implicit relationship with any record containing an email address matching an address in the From, To, or CC lines of the email record. For more information on setting lead conversion options, please refer to the [System](#) documentation.

Steps to Convert a Lead

Once the lead has been evaluated and qualified, they are ready to be converted to a contact in Sugar. Please note that administrators have the ability to configure what fields appear on the convert lay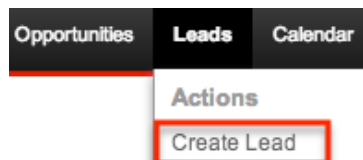out via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

The following steps cover converting a lead to a contact and creating a new meeting record as an example:

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

2. Select "Convert Lead" from the Actions menu.

3. Check the contact information in the Create Contact panel of the Convert Lead page and make changes if necessary. The information on this panel will be carried over to the new contact record.

4. Enter appropriate values for the fields in the Create Account panel. The "Create Account" is checked off by default to allow creation of a new account.

Note: You also have the option to uncheck the box to select an existing account record instead and relate it to the lead. Please note that modules with a one-to-one relationship or one-to-many relationship with Contacts can have the option to select an existing record instead of creating a new record during lead conversion. By default, the Accounts module has the select option since there is an existing one-to-many relationship. For more information on configuring the selection option for modules on the Convert Lead page, please refer to the Studio documentation.

5. Check the box for "Schedule Meeting" and enter the appropriate values in the displayed fields.
   You can also create a note, task, or log a call by checking the box associated to the activity to open up the panel.

6. Once all of the necessary information is entered and the appropriate records created, click "Save".
   ○ A confirmation page will display confirming the creation of the new contact, account, and meeting record.

The converted lead record will display the converted contact and account name at the top of the detail view page. You can click the record's names to view the detail's of the converted record's.

If one of the lead conversion options (Copy or Move) is selected in Admin > System Settings, the corresponding field (i.e. Copy Activities to, Move Activities to) will appear at the bottom of the Convert Lead page. Please note that the Contacts and Accounts module appear in the Copy Activities to and Move Activities to list by default. A module is added to the list when you select it for creation on the Convert Lead page. For example, if you select "Create Opportunity" on the Convert Lead page, then the Opportunity module will appear in the list as well.

If the Copy option is selected in Admin > System Settings, then the Copy Activities to field (multiselect) will appear on the Convert Lead page to copy the lead's activities to the selected module record(s):

If the Move option is selected in Admin > System Settings, then the Move Activities to field (dropdown) will appear on the Convert Lead page to move the lead's activities to the selected module record:

If you select a module to copy or move the activity during lead conversion, the activity record(s) will show up in the Activities (open activities) and History (held activities) subpanel of the newly created record(s). For example, if we select "Contact" in the Copy Activities to field then all the lead's activities will be copied and related to the new contact record.

Exporting Leads

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

server, there may be occasions when the application times out while exporting a large number of lead records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

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

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

Downloading a Lead's vCard

vCards are electronic business cards that are exchanged through applications such as email and web browsers. In addition to being able to create a lead from an existing vCard, you can also download a vCard from Sugar in order to transfer the lead's information to another application.

The following steps cover downloading a vCard and saving it as a contact in Microsoft Outlook as an example:

1. Navigate to a lead record's detail view.
2. Click the vCard icon to the right of the lead's name to download the vCard file.

3. Open the downloaded file in your mail or address book application. For this example, double clicking opens the vCard in Outlook.
4. Make any necessary changes to the information, then click "Save & Close" to save this lead in Outlook.

Mass Updating Leads

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

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

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

1. Navigate to the Leads list view by clicking the Leads module tab.
2. Use the list view's Basic or Advanced Search to identify leads you wish to modify.

3. Select the desired leads individually or using the [checkbox dropdown's](#) options.
4. Choose "Mass Update" from the Actions menu.

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

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

Finding Duplicate Leads

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

Please note that your ability to use the Find Duplicate action may be restricted by

any role which prevents lead deletion. For more information on roles, please refer to the [Role Management](#) documentation.Check with your system administrator if you do not see the Find Duplicates option.

Use the following steps to locate duplicate leads using the Find Duplicates option from the Lead detail view:

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

3. Move any fields you wish to use in identifying duplicates to the list on the right by selecting the field and clicking the arrow.

4. Click "Next Step" to display a list of potential duplicate lead records which match all of the specified filters.

Once you determine which leads shown in the resulting list are indeed duplicates of your original record, select the duplicates by marking the checkboxes then click "Perform Merge" to begin a merge with the current record. Instructions for the merge process that follows can be found in the [Merging Via Detail View](#) section of this documentation.

Merging Leads

When duplicate records are identified in Sugar, you have the option to merge two

or more duplicate leads into a single record. Once the merge is complete, the duplicate lead record(s) will be deleted, and the primary record will remain. Please note that all relationships belonging to the duplicate leads will be merged to the primary record meaning that any calls, meetings, etc. related to the duplicate lead record(s) will automatically be related to the resulting, merged lead record.

Merging Via Detail View

Use the following steps to merge leads via the Leads detail view:

1. Navigate to a lead record's detail view.
2. Use the Find Duplicates option as shown in [Finding Duplicate Leads](#) to identify duplicate leads.
3. Possible duplicates will be displayed in the results list. Select the duplicate record(s).

4. Click "Perform Merge" to display the Merge Leads page. The primary record's field values are displayed on the left while other records' values are in columns to the right. Saving the merge will preserve only the leftmost values for each field into a single lead record.

5. To change which record is considered the primary, click the "Set as primary" double arrows.
6. Review the field values in each column and use the associated double arrows to move the best value for each field to the leftmost column.
7. Click "Save Merge" once the left column contains all fields you wish to appear on the single, merged record.
8. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Ok" to proceed.

Merging Via List View

[Basic](#) and [Advanced Search](#) may be used to identify duplicate leads by, for example, searching for leads with similar names. Once your search has identified duplicate leads, you can merge them directly from the Leads list view.

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

1. Use the list view's [Basic](#) or [Advanced Search](#) to identify duplicate leads.
2. Possible duplicates will be displayed in the list view. Select the duplicate record(s) that you wish to merge.

3. Select "Merge" from the Actions menu to display the Merge Leads page. The primary record's field values are displayed on the left while other record's values are in columns to the right. Saving the merge will preserve only the leftmost values for each field into a single lead record.

4. To change which record is considered the primary, click the "Set as primary" double arrows.
5. Review the field values in each column and use the associated double arrows to move the best value for each field to the leftmost column.
6. Click "Save Merge" once the left column contains all fields you wish to appear on the single, merged record.
7. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Ok" to proceed.

Favoriting Leads

Each Sugar user has the option to designate their own favorite leads which are important or will be viewed often so that they can easily be accessed via search or from the Leads module tab. Once records are marked as favorites, use the My Favorites checkbox in the Lead's [Basic](#) or [Advanced Search](#) to retrieve your favorites or select from your most recent favorites directly from the [Leads module tab](#).

Favoriting Via List View

Use the following steps to mark records as favorites via the Leads list view:

1. Navigate to the Leads list view by clicking the Leads module tab.
2. Use the [Basic](#) or [Advanced Search](#)to find the Lead records you wish to mark as favorites.
3. Mark the star icon on the left of each desired lead's row.
4. To remove the lead as a favorite, click the star again to revert it to white.

Favoriting Via Detail View

Use the following steps to mark records as favorites via the Leads detail view:

1. Navigate to a lead record's detail view.
2. Click the star icon to the right of the lead's name in the upper left of the detail view to designate it as a favorite.
3. To remove the lead as a favorite, click the star again to revert it to white.

Viewing Lead Change Logs

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

Emailing Leads

Sugar allows users to compose and send outbound emails to leads. There are various ways to send outbound mail to leads including emailing via the Emails module, Emails quick compose, Leads module, campaigns, and workflows. Please note that administrators in Sugar must first configure the outbound mail server for the system via Admin > Email Settings in order for users to send outbound emails. For more information on setting up the system email settings, please refer to the documentation in the Administration guide. Users will also need to have their email settings configured in their user preferences prior to sending outbound email from the Emails module, Emails quick compose, or Leads module. For more information on setting up your user preferences' email settings, please refer to the

Emailing Via the Emails Module

Use the following steps to compose and send an email to a lead via the Emails module. For more detailed information on sending emails via the Emails module, please refer to the [Emails](#) documentation.

1. Navigate to the Emails module by clicking the Emails module tab.
2. Click the Compose button on the upper left of the Emails module.

3. For the "Related To" field, select "Leads" as the module, then enter or select the desired lead's name. The email's To field will automatically populate with

the name and email address of the selected lead record.

4. Enter a subject and body for the email message, then click "Send".

Once the email is sent successfully, the email record will appear in the History subpanel of the lead record.

Emailing Via Quick Compose

The quick compose option allows users to compose emails from various places in Sugar without navigating away from the current page.

While viewing a lead record, you can select "Send Email" from the Quick Create menu on the top right of any Sugar page. Quick creating an email while viewing a lead record's detail view automatically populates the To field with the leads name and email address as well as relating the email to the lead record.

Users can also use Quick Compose by clicking a lead's email address anywhere it is displayed as a link. Clicking the email address automatically populates the To field with the lead's name and email address as well as relating the email to the lead record.

Quick Compose is also available from the Activities subpanel in a lead's detail view. Choosing "Compose Email" from the Actions menu automatically populates the To field with the lead's name and email address as well as relating the email to the lead record .

Once the email is sent successfully, the email record will appear in the History subpanel of the lead record. For more detailed information on sending emails via quick compose, please refer to the [Emails](#) documentation.

Emailing Via Leads List View

One or more leads may be emailed at a time from the Leads list view. For more detailed information on sending emails via the Leads list view, please refer to the documentation.

Use the following steps to compose and send an email from the Leads list view:

1. Navigate to the Leads list view by clicking the Leads module tab.
2. Use the [Basic](#) or [Advanced Search](#) to find the Lead records you wish to include on the email.
3. Select the desired leads individually or using the [checkbox dropdown's](#) options.
4. Select "Email" from the Actions menu.

5. In the Quick Compose email template, enter in the subject and body of the email message, then click "Send".
The To field will be automatically populated with the name and email address of the selected lead record(s).

Once the email is sent successfully, the email record will appear in the History subpanel of the lead record(s).

Emailing Via Campaigns

Sugar's Campaigns module can be used to create email and newsletter campaigns to send mass emails to a relevant set of leads. Email-type campaigns are mass emails sent to a target list while newsletter-type campaigns are a series of mass emails sent to a consistent or growing target list periodically or on a regular basis. For more information on sending mass emails to leads via a campaign, please refer to the Campaigns documentation.

Emailing Via Workflows

Sugar's Workflow module enables you to automate tasks, send email alerts, and execute various actions. With each workflow, a set of conditions trigger a combination of actions and email alerts potentially including alerts to lead records. You also can create alert email templates used by workflows to insert relevent data to the automated email notifications. For more information on workflow email notifications, please refer to the Email Alertsection of the Workflows documentation.

Adding Leads to a Target List

A target list consists of a group of individuals or organizations you wish to be included or excluded on a mass marketing campaign. These targets are typically identified based on a set of predetermined criteria such as being a prospect or existing customer, age group, industry, etc. There are various ways to add leads to a target list in Sugar including using the Add to Target List option from the Lead list view's Actions menu. For more information on target lists and other methods of adding leads, please refer to the Target Lists documentation. Due to the PHP memory limitations on the server, t here may be occasions when the application times out while adding lead records to a target list.If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

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

1. Navigate to the Leads list view by clicking the Leads module tab.
2. Use the Basic or Advanced Search to find the Lead records you wish to add to a target list.
3. Select the desired lead records individually or using the checkbox dropdown's options.
4. Choose "Add to Target List" from the Actions menu.

5. Locate and select the desired target list in the pop-up window or click "Create Target List" to add to a new target list.

In order to view the leads that have been added, you can navigate to the Target Lists module. Click the target list's name to enter the detail view, and you will see the lead records within the Leads subpanel.

Connectors

Connectors in Sugar allow the system to connect existing lead records in Sugar to external applications such as Hoovers and Zoominfo. Users can search, view, and merge additional lead data from the specific data source by selecting "Get Data" from the Actions menu of the Leads detail view. For more information on utilizing the connectors to get data, please refer to the Get Data section of the User Interface documentation. Please note that the Hoovers and Zoominfo connectors are not enabled by default for the Leads module. Administrators must first enable the connectors via Admin > Connectors in order for the Get Data option to appear in the Actions menu. For more information on enabling connectors, please refer to the Enabling Connectors section of the System documentation in the Administration guide.

Managing Lead Subscriptions

Leads who receive newsletter-type campaign emails from your Sugar instance are considered subscribers to that newsletter. Users can manage these newsletter subscriptions from the Leads detail view using the Manage Subscriptions option in the Actions menu. Please note that you can only manage subscriptions for newsletter-type campaigns. A newsletter campaign you have created will have one or more default-type target lists. Leads are added to these target lists in order to receive your newsletter. The Manage Subscriptions option allows you to add a lead to the default-type or suppression-type target lists of your newsletter campaigns without leaving the Leads module. For more information on newsletter subscriptions, please refer to the Campaigns documentation.

Use the following steps to manage lead subscriptions via a lead's detail view:

1. Navigate to a lead record's detail view.
2. Select "Manage Subscriptions" from the Actions menu.

Raymond Whelan

Edit ▾

Duplicate
Delete
Find Duplicates
Get Data
Convert Lead
Manage Subscriptions

3. To add the lead to a newsletter subscription mailing list, select the newsletter from the Available/Newsletters Unsubscribed To list and drag it to the Newsletters Subscribed To list. This will add the lead to the campaign's default target list.

4. To remove the lead from the newsletter subscription mailing list, select the newsletter from the Newsletters Subscribed To list and drag it to the Available/Newsletters Unsubscribed To list. This will add them to the suppression-type unsubscription target list for the newsletter campaign which will prevent the lead from receiving the newsletter. Please note that the lead will not be removed from the campaign's default target list.

Manage Subscriptions

Save ▾

Newsletters Subscribed To   Available/Newsletters Unsubscribed To

January 2013 Campaign   ←   February 2013 Newsletter

5. Click "Save" to preserve your changes.

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

Contacts

Overview

Sugar's Contacts module consists of individual people with whom your organization has a relationship. Contact records are typically related to an account record, and multiple contacts may be associated to a single account. There are various ways you can create contacts in Sugar such as via the Contacts module, importing contacts, converting leads to contacts, etc. Once the contact record is created, you can view and edit information pertaining to the contact via the Contacts detail view. Each contact record may then relate to other Sugar records such as meetings, cases, opportunities, and many others, making the contact record a hub for viewing and continuing your interaction with the individual. This

documentation will cover how to use the Contacts module as well as the various actions and options available from within the module.

Contact Fields

The Contacts module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the [Studio](#) documentation in the Administration guide.

Field	Description
Account Name	The account to which the contact belongs
Assigned To	The Sugar user assigned to the contact
Assistant	The name of the contact's assistant within his or her company
Assistant Phone	The assistant's phone number
Birthdate	The contact's date of birth
Campaign	The campaign, if any, from which the contact originated
Confirm Portal Password	When editing, confirmation of the contact's password for accessing Sugar Portal
Date Created	The date the contact record was created
Date Modified	The date the contact record was last modified
Department	The contact's department within his or her company
Description	A description or other information about the contact
Do Not Call	Indication that the contact should not be called
Email Address	The contact's email address
Fax	The contact's fax number
First Name	The contact's first name
Home	The contact's residence number

Last Name	The contact's last name
Lead Source	The source from which the contact originated
Mobile	The contact's mobile number
Name	When viewing, the contact's full name
Office Phone	The contact's office number
Other Address	The contact's alternate address (e.g. billing or shipping)
Other Phone	The contact's alternate phone number
Picture	An image for the contact (e.g. business card or profile picture)
Portal Active	Indication that the contact is enabled to access Sugar Portal
Portal Application	The portal application name. Only used when integrating a custom portal solution with Sugar.
Portal Name	The contact's user name for accessing Sugar Portal
Portal Password	The contact's password for accessing Sugar Portal
Preferred Language	The contact's preferred language when accessing Sugar Portal
Primary Address	The contact's primary address
Reports To	The contact's manager in his or her company
Salutation	Standard greeting for the contact (e.g. Mr., Ms., Mrs., etc.)
Sync to Outlook	Indication that the contact should be synced to Outlook when using the Sugar Plug-in for Outlook Note: This field must be set on a per-user basis.
Teams	The Sugar team(s) assigned to the contact record
Title	The contact's title within his or her company

Contacts Module Tab

The Contacts module tab is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access the Contacts list view. You may also hover on the tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform important actions within the module. The [Recently Viewed menu](#) displays the list of contacts you last viewed in the module. The [Favorites menu](#) displays the list of contacts you most recently marked as favorites in the module.

The Actions menu allows you to perform the following operations:

Menu Item	Description
[Create Contact](#)	Opens the edit view layout to create a new contact
[Create Contact From vCard](#)	Imports a vCard file from your computer to create a new contact
[View Contacts](#)	Opens the list view layout to search and display contacts
[View Contact Reports](#)	Displays existing reports based on the Contacts module
[Import Contacts](#)	Opens the import wizard to create or update contacts using external data

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

- The top navigation bar may be filtered based on a specific tab grouping (e.g. Activities, Reports, etc.) of which the Contacts module is not a member. Click the More tab (last tab on navigation bar) then hover on "Filter Menu By" to check how the navigation bar is grouped. For more information on tab grouping, please refer to the [User Interface](#) documentation.
- The Contacts module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your

user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Contacts module in the Hide Modules list, simply move it to the Display Modules list and save. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.

- The administrator may have disabled the Contacts module for your entire Sugar instance. Reach out to your Sugar administrator to have the Contacts module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

Creating Contacts

There are various methods for creating contacts in Sugar including via the Contacts module, quick create, vCard, duplication, emails, importing contacts, and converting leads to contacts. The full edit view layout opens when creating the contact directly from the Contacts menu and includes all of the relevant fields for your organization's contacts. The quick create form is a shortened version of the contacts edit view and typically contains fewer fields. When using quick create to make a contact while viewing an existing record of another module, Sugar automatically creates a relationship between both records. For example, if you are viewing an account record (e.g. ABC Company) and create a new contact via the quick create form, the Account Name field in the contact record will automatically populate with "ABC Company", thus creating the relationship. Both the Edit View and Quick Create layouts can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

Creating Via Contacts Module

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

1. Hover on the Contacts module and select "Create Contact".

2. Enter appropriate values for the fields in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.

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

Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also quick create a contact from any Contacts subpanel on related module records.
Use the following steps to create a contact via Quick Create:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Contact" or select "Create" on any Contacts subpanel on a related module's detail view.
   From Quick Create menu:

   From subpanel:

2. Enter appropriate values in the fields in the quick create form. All required fields are marked with a red asterisk and must be completed prior to saving.
3. If additional fields are desired, click the Full Form button to use edit view instead.
4. Once the necessary information is entered, click "Save".

Creating Via vCard

vCards are electronic business cards that are exchanged between applications such as email and web browsers. In addition to allowing contacts to be saved as vCards for use in other software, you can also generate a new Sugar contact from a vCard.
Use the following steps to create a contact in Sugar via vCard:

1. Hover on the Contacts module and select "Create Contact From vCard".

2. Choose the vCard file from your computer and click "Import vCard".

Creating Via Duplication

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

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

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

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

Creating Via Emails

The Emails module enables users to create new contact records from external and imported emails using the Quick Create option. Simply click the Quick Create button above the selected email header then select "Contact".

A pop-up window will open with the quick create form where you can enter relevant values for the new contact. The name, email address, and description fields are populated by default based on the emails subject, body, etc. All required fields are marked with a red asterisk and must be completed prior to saving. Once the necessary information is entered, click "Save". For more information on how to create, send, and manage emails, please refer to the Emails documentation.

Please note that the selected email will be imported, if not already, and automatically related to the new contact. The email record will appear within the

History subpanel of the Contacts detail view.

Importing Contacts

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

Use the following steps to import contacts via the Import Contacts option:

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

2. In Step 1, select the source of the data you are importing. Click "Next".
3. In Step 2, select the import file and choose "Create new records only". Click "Next".
4. In Step 3, confirm the import file properties. Click "Next".
5. In Step 4, confirm the field mappings for the import. Click "Next".
6. In Step 6, view the import results.
   - The Created Records tab will show all of the new contact records.
   - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
   - The Errors tab will show records that were not imported due to errors detected during import.

Converting Leads to Contacts

Sugar enables you to convert lead records to contact records as you determine that they qualify for your organization's definition of a contact (e.g. after an evaluation/qualification process or upon entering into business with the individual). When the lead is converted, a new contact record is created with a relationship to the original lead record. For more information on converting leads, please refer to the [Leads](#) documentation.

Use the following steps to convert leads into contacts:

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

2. Select "Convert Lead" from the Actions menu.

3. Complete the appropriate sections of the Convert Lead page.
4. Click "Save" to convert the lead.

Viewing Contacts

There are various options available for viewing contact records in Sugar including via Contacts list view, Contacts detail view, Contacts Recently Viewed menu, dashlets, and reports. Please note that you will only be able to see contact records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#)documentation in the Administration guide.

Viewing Via List View

The Contacts list view displays all contact records meeting the current search criteria. To access the list view, simply click the Contacts module tab. While list view shows key contact fields, you can click the contact's name to open the record

in detail view. For more information on viewing contacts via list view, please refer to the Contacts List View section .

Viewing Via Detail View

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

Viewing Via Recently Viewed

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

Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets which allow users to get a quick view of various records, activities, reports, etc. You can view contact information in contact-based dashlets such as "My Contacts" as well as in dashlets based on other modules such as "My Calls". Clicking a contact's name from any dashlet will open the contact in detail view. For more information on using dashlets and viewing contact records via dashlets, please refer to the Modules section of the Home documentation.

Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding contacts and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the contact record's detail view by clicking the contact's name in the report results. Please note that you can only directly access contact detail views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the [Reports](#) documentation.

In addition to navigating to the Reports module and finding or building relevant reports, you can use the Contact module tab's View Contact Reports option to see all contact-based reports to which you have access.

Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

Searching Contacts

The Contacts list view includes a Basic and Advanced Search to help you locate

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

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

Basic Search

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

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

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

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Items" and enter a contact name, Sugar will only return contact records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the [list view](#) below the search panel. To see all contact records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to

see contact records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide.

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

Advanced Search

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

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

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

When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select "My

Favorites" and enter in a contact name to search, Sugar will only return contact records with a matching name that you have marked as favorites. When searching by a multiselect or dropdown field (e.g. "Assigned to"), however, Sugar will return records matching any of these selections. Once the search completes, the relevant results will populate in the list view below the search panel. To see all contact records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters.Please note that you will only be able to see contact records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

Administrators can configure what fields appear on the Contacts Advanced Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Global Search

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

To use global search, you need to first enter the keyword into the search box. With Full Text Search enabled, pop-up results will begin appearing once you input three or more characters. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. When Full Text Search is not enabled, results starting with your keyword will appear after clicking the magnifying glass icon or hitting your Return/Enter key. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

Contacts List View

The Contacts list view displays all contact records meeting the current search criteria and to which your user has access. You can view the basic details of each contact within the field columns. Please note that you will only be able to see contact records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide.

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

Pagination

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

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

Name		My Items ☐ My Favorites ☐	Search	Clear	**Advanced Search**	⑦
☐ ▾	Delete ▾				⏮ ◀ (1 - 20 of 174) ▶ ⏭	

Checkbox Selection

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

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

Actions Menu

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

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

Menu Item	Description
Delete	Delete one or more contacts at a time
Email	Email one or more contacts at a time
Mass Update	Mass update one or more contacts at a time
Mail Merge	Perform a mail merge on one or more contacts at a time Note: This option only appears when Mail Merge is enabled at the system level and under the user's profile.
Merge	Merge two or more duplicate contacts

Add to Target List	Add one or more contacts to a target list
Export	Export one or more contacts to a CSV file

Favorite Designation

Users have the option to mark contact records as favorites via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Contacts module tab. In the Contacts list view, the star on the left of each contact's row is yellow once marked to indicate a favorite contact. For more information on marking records as favorites, please refer to the Favoriting Contacts section of this documentation.

More Information

Additional details for each contact can be viewed by clicking the "i" icon to the far right of each list view row. This provides users a quick view of additional contact information in addition to what appears in the display column fields. The resulting pop-up window will show the Primary Address, Mobile, Home, Other Phone, Date Modified, and Description fields by default. The list of fields appearing here may only be configured through a code-level customization.

Column Sorting

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

refer to the [Layout Options](#) section of the Search documentation.

Contacts Detail View

The Contacts detail view displays thorough contact information including all contact fields which are grouped by default into the Overview, More Information, and Other panels. You can also view a contact's related records (Activities, Opportunities, Leads, etc.) which appear in [subpanels](#) beneath the contact fields. The detail view can be reached by clicking a contact record's link from anywhere in the application including from the Contacts list view.

Please note that you will only be able to view a contact record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.
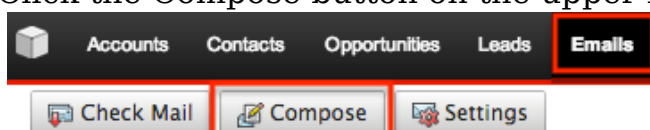
Actions Menu

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

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

Menu Item	Description
[Edit](#)	Edit this contact
[Duplicate](#)	Duplicate this contact

Delete	Delete this contact
Find Duplicates	Locate potential duplicates of this contact
Get Data	Search, view, and merge additional contact data via Hoover's and/or Zoominfo connector
Manage Subscriptions	Manage this contact's newsletter campaign subscriptions
View Change Log	View a record of changes to this contact

Favorite Designation

Users have the option to mark contact records as a favorite via the detail view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Contacts module tab. In the Contacts detail view, the star on the right of the contact's name is yellow once marked to indicate a favorite contact. For more information on how to mark records as favorites, please refer to the Favoriting Contacts section of this documentation.

Next or Previous Record

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

Subpanels

Beneath a contact record's fields are subpanels containing related records from various modules, campaign interaction history for this contact, and the contact's InsideView information.

Related Record Subpanels

The most common type of subpanels displayed on a contact's detail view contain the contact's related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. For example, a contact may be related to only one account but related to multiple opportunities. This means that the related account will be displayed amongst the contact's fields while opportunities will be displayed in a subpanel beneath the fields.

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

Related record subpanels allow the following operations to be performed. Please note that administrators in Sugar can change the subpanel's Action menu to be displayed as separate buttons instead of a dropdown via Admin > System Settings. For more information, please refer to the [System](#) documentation in the Administration guide.

- To view the details of a related record, click the record's name in the subpanel to open it in detail view.
- To relate an existing record to the contact, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the contact, choose "Create" from the subpanel's Action menu, then complete the Quick Create form and click "Save".
- To edit the campaign's related record, choose "Edit" on the far right of the record's row.
- To delete the contact's relationship to a record, choose "Unlink" from the dropdown on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

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

Activities and History Subpanels

The Activities subpanel lists open or upcoming tasks, calls, and meetings that are related to the contact record. Once the activities have taken place or are completed, they will instead appear within the History subpanel. The History subpanel also includes notes and emails associated with the contact record. For more information on the history and activities subpanel, please refer to the User Interface documentation.

Campaigns Subpanel

The Campaigns subpanel contains historical information regarding a contact record's interaction with all Sugar campaigns. When a mass marketing campaign is sent to a contact (or manually marked as sent in the case of non-email campaigns), the related campaign activity information will appear within the Campaigns subpanel. This information mirrors the "View Status" page available from within each individual campaign and shows activities such as when a campaign was sent, when the contact viewed the campaign message, when the contact clicked a tracked link within the campaign, etc. Since this subpanel contains historical campaign interactions for the contact, it cannot be used to

associate a contact with a campaign or otherwise manage a campaign or target list. For more information on associating a contact with a campaign, please refer to the [Adding Contacts to a Target List](#) section of this documentation. For more

information on campaigns, please refer to the [Campaigns](#) documentation.

InsideView Subpanel

The InsideView subpanel, if you are an InsideView user, provides relevant company information, news, and social media insights within your contact's detail view. The InsideView subpanel will appear by default on the detail view. The panel can be minimized by clicking the double arrow next to "InsideView". For more information on viewing contact information via InsideView, please refer to the [User Interface](#) documentation. Administrators in Sugar also have the ability to disable InsideView for the entire instance so that it is not visible to users. For more information on disabling InsideView, please refer to the [Connectors](#) section of the System documentation in the Administration guide.
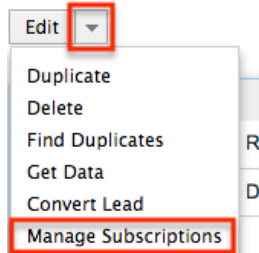

Editing Contacts

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

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

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

Administrators in Sugar may configure both the Contacts edit view and quick create via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

Editing Via Detail View

You can edit contacts via the detail view by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve your changes.

Editing Via List View

You can edit contacts via the list view by clicking the Pencil icon to the left of each contact's name. A pop-up window will open with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve your changes.

Editing Via Dashlets

You can edit contacts by clicking the pencil icon to the far right of any contacts-based dashlet on your Sugar home page. For example, clicking the pencil icon within the My Contacts dashlet will open a pop-up window with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. For more information on dashlets, please refer to the Home documentation.

Editing Via Reports

Sugar reports also allow you to edit a contact record by clicking on the pencil icon next to a contact's name. This opens a pop-up window with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. Please note that you may only directly

edit contacts from Rows and Columns-type or Summation with Details-type reports as Summation-type and Matrix-type reports do not include the pencil icon. For more information on reports, please refer to the [Reports](#) documentation.

Name: Contact Report
Modules: Contacts, Contacts > Account, Contacts > Email Address, Contacts > Assigned to User
Display Columns: Contacts Name, Account Name, Email Address, User Name
Schedule: None
Filters: None

Type: Rows and Col
Teams: Global
Assigned to: Max Je

(1 - 100 of 20

Contacts Name ⬍	Account Name ⬍	Email Address ⬍	User Name ⬍
Adalberto Addy ✎	DD Furniture Inc ✎	section17@example.net	chris ✎

Deleting Contacts

If a contact record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Contacts detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting contact records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

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

Deleting Via Detail View

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

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

   Ms. Jane Smith ☆

   Edit ▾
   Duplicate
   Delete
   Find Duplicates   Ms. Jane Smith

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

Mass Deleting Via List View

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

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

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

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

Exporting Contacts

Sugar's Export option allows users to download all fields for the selected contacts to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Contact data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered contacts back into Sugar. For more information on updating existing records via import, please refer to the Import documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of contact records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Contacts may be exported from the Contacts list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for contacts and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar,

please refer to the [Export](#) documentation.

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

Downloading a Contact's vCard

vCards are electronic business cards that are exchanged through applications such as email and web browsers. In addition to being able to [create a contact from an existing vCard](#) , you can also download a vCard from Sugar in order to transfer the contact's information to another application.

The following steps cover downloading a vCard and saving it as a contact in Microsoft Outlook as an example:

1. Navigate to a contact record's detail view.
2. Click the vCard icon to the right of the contact's name to download the vCard file.

3. Open the downloaded file in your mail or address book application. For this example, double clicking opens the vCard in Outlook.
4. Make any necessary changes to the information, then click "Save & Close" to save this contact in Outlook.

Mass Updating Contacts

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

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

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

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

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

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

Finding Duplicate Contacts

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

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

Use the following steps to locate duplicate contacts using the Find Duplicates option from the Contact detail view:

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

2. Choose "Find Duplicates" from the Actions menu.

Mr. Sam Anderson ☆

Edit ▼

Duplicate
Delete
Find Duplicates   Ir. Sam Anderson

3. Move any fields you wish to use in identifying duplicates to the list on the right by selecting the field and clicking the arrow.

Next Step >   Cancel

Available Fields: Filter Condition:

Department
Mobile
Office Phone
Other Phone   ►   ⊖ First Name: Contains ⇕   Sam
Fax
Email Address
Other Email   ⊖ Last Name: Contains ⇕   Anderson

4. Click "Next Step" to display a list of potential duplicate contact records which match all of the specified filters.

Name ⇕	Title ⇕	Account Name ⇕
☐ ☆ ✎ **Sam Anderson**	Sales Manager	Bay Funding Co
☐ ▼		

Perform Merge   Cancel

Once you determine which contacts of the resulting list are indeed duplicates of your original record, select the duplicates by marking the checkboxes, then click "Perform Merge" to begin a merge with the current record. Instructions for the merge process that follows can be found in the Merging Via Detail View section of this documentation.

Merging Contacts

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

Merging Via Detail View

Use the following steps to merge contacts via the Contacts detail view:

1. Navigate to a contact record's detail view.
2. Use the Find Duplicates option as shown in [Finding Duplicate Contacts](#) to identify duplicate contacts.
3. Possible duplicates will be displayed in the results list. Select the duplicate record(s).

4. Click "Perform Merge" to display the Merge Contacts page. The primary record's field values are displayed on the left while other records' values are in columns to the right. Saving the merge will preserve only the leftmost values for each field into a single contact record.

5. To change which record is considered the primary, click the "Set as primary" double arrows.
6. Review the field values in each column and use the associated double arrows to move the best value for each field to the leftmost column.
7. Click "Save Merge" once the left column contains all fields you wish to appear on the single, merged record.
8. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Ok" to proceed.

Merging Via List View

[Basic](#) and [Advanced Search](#) may be used to identify duplicate contacts by, for example, searching for contacts with similar names or related accounts. Once your search has identified duplicate contacts, you can merge them directly from the

Contacts list view.

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

1. Use the list view's Basic or Advanced Search to identify duplicate contacts.
2. Possible duplicates will be displayed in the list view. Select the duplicate record(s) that you wish to merge.

3. Select "Merge" from the Actions menu to display the Merge Contacts page. The primary record's field values are displayed on the left while other record's values are in columns to the right. Saving the merge will preserve only the leftmost values for each field into a single contact record.

4. To change which record is considered the primary, click the "Set as primary" double arrows.
5. Review the field values in each column and use the associated double arrows to move the best value for each field to the leftmost column.
6. Click "Save Merge" once the left column contains all fields you wish to appear on the single, merged record.
7. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Ok" to proceed.

Favoriting Contacts

Each Sugar user has the option to designate their own favorite contacts which are important or will be viewed often.Once records are marked as favorites, use the My Favorites checkbox in the Contacts Basic or Advanced Search to retrieve your favorites or select from your most recent favorites directly from the Contacts module tab .

Favoriting Via List View

Use the following steps to mark records as favorites via the Contacts list view:

1. Navigate to the Contacts list view by clicking the Contacts module tab.
2. Use the [Basic](#) or [Advanced Search](#) to find the contact records you wish to mark as favorites.
3. Click the star icon on the left of each desired contact's row.
4. To remove the contact as a favorite, click the star again to revert it to white.

Favoriting Via Detail View

Use the following steps to mark records as favorites via the Contacts detail view:

1. Navigate to a contact record's detail view.
2. Click the star icon to the right of the contact's name in the upper left of the detail view to designate it as a favorite.
3. To remove the contact as a favorite, click the star again to revert it to white.

Viewing Contact Change Logs

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

Emailing Contacts

Sugar allows users to compose and send outbound emails to contacts. There are various ways to send outbound mail to contacts including emailing via the Emails module, Emails quick compose, Contacts module, campaigns, and workflows. Please note that administrators in Sugar must first configure the outbound mail server for the system via Admin > Email Settings in order for users to send outbound emails. For more information on setting up the system email settings, please refer to the Email documentation in the Administration guide. Users will also need to have their email settings configured in their user preferences prior to sending outbound email from the Emails module, Emails quick compose, or Contacts module. For more information on setting up your user preferences' email settings, please refer to the Getting Started documentation.

Emailing Via the Emails Module

Use the following steps to compose and send an email to a contact via the Emails module. For more detailed information on sending emails via the Emails module, please refer to the Emails documentation.

1. Navigate to the Emails module by clicking the Emails module tab.
2. Click the Compose button on the upper left of the Emails module.

3. For the "Related To" field, select "Contacts" as the module then type or select the desired contact's name. The email's To field will automatically populate with the name and email address of the selected contact record.
4. Enter a subject and body for the email message then click "Send".

Once the email is sent successfully, the email record will appear in the History subpanel of the contact record.

Emailing Via Quick Compose

The quick compose option allows users to compose emails from various places in Sugar without navigating away from the current page.

While viewing a contact record, you can select "Send Email" from the Quick Create menu on the top right of any Sugar page. Quick creating an email while viewing a contact record's detail view automatically populates the To field with the contact's name and email address as well as relating the email to the contact record.

Users can also use Quick Compose by clicking a contact's email address anywhere it is displayed as a link. Clicking the email address automatically populates the To field with the contact's name and email address as well as relating the email to the contact record.

Quick Compose is also available from the Activities subpanel in a contact's detail view. Choosing "Compose Email" from the Actions menu automatically populates the To field with the contact's name and email address as well as relating the email to the contact record.

Once the email is sent successfully, the email record will appear in the History subpanel of the contact record. For more information on sending emails via quick compose, please refer to the Emails documentation.

Emailing Via Contacts List View

One or more contacts may be emailed at a time from the Contacts list view. For more information on sending emails via the Contacts list view, please refer to the documentation.

Use the following steps to compose and send an email from the Contacts list view:

1. Navigate to the Contacts list view by clicking the Contacts module tab.
2. Use the Basic or Advanced Search to find the contact records you wish to include on the email.
3. Select the desired contacts individually or using the checkbox dropdown's options.
4. Select "Email" from the Actions menu.

5. In the Quick Compose email template, enter in the subject and body of the email message, then click "Send". The To field will be automatically populated with the name and email address of the selected contact record(s).

Once the email is sent successfully, the email record will appear in the History subpanel of the contact record(s).

Emailing Via Campaigns

Sugar's Campaigns module can be used to create email and newsletter campaigns to send mass emails to a relevant set of contacts. Email-type campaigns are mass emails sent to a target list while newsletter-type campaigns are a series of mass emails sent to a consistent or growing target list periodically or on a regular basis. For more information on sending mass emails to contacts via a campaign, please refer to the Campaigns documentation.

Emailing Via Workflows

Sugar's Workflow module enables you to automate tasks, send email alerts, and execute various actions. With each workflow, a set of conditions trigger a combination of actions and email alerts potentially including alerts to contact records. You also can create alert email templates used by workflows to insert relevent data to the automated email notifications. For more information on workflow email notifications, please refer to the Email Alert section of the Workflows documentation.

Adding Contacts to a Target List

A target list consists of a group of individuals or organizations you wish to be included or excluded on a mass marketing campaign. These targets are typically identified based on a set of predetermined criteria such as being a prospect or existing customer, age group, industry, etc. There are various ways to add contacts to a target list in Sugar including using the Add to Target List option from the Contact list view's Actions menu. For more information on target lists and other methods of adding contacts, please refer to the [Target Lists](#) documentation. Due to the PHP memory limitations on the server, t here may be occasions when the application times out while adding contact records to a target list.If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

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

1. Navigate to the Contacts list view by clicking the Contacts module tab.
2. Use the [Basic](#) or [Advanced Search](#) to find the contact records you wish to add to a target list.
3. Select the desired contact records individually or using the [checkbox dropdown's](#) options.
4. Choose "Add to Target List" from the Actions menu.

5. Locate and select the desired target list in the pop-up window or click "Create Target List" to add to a new target list.

In order to view the contacts that have been added, you can navigate to the Target Lists module. Click the target list's name to enter the detail view, and you will see

the contact records within the Contacts subpanel.

Connectors

Connectors in Sugar allow the system to connect existing contact records in Sugar to external applications such as Hoovers and Zoominfo. Users can search, view, and merge additional data for the contact from the specific data source by selecting "Get Data" from the Actions menu of the Contacts detail view. For more information on utilizing the connectors to get data, please refer to the Get Data section of the User Interface documentation. Please note that the Hoovers and Zoominfo connectors are not enabled by default for the Contacts module. Administrators must first enable the connectors via Admin > Connectors in order for the Get Data option to appear in the Actions menu. For more information on enabling connectors, please refer to the Enabling Connectors section of the System documentation in the Administration guide.

Managing Contact Subscriptions

Contacts who receive newsletter-type campaign emails from your Sugar instance are considered subscribers to that newsletter. Users can manage these newsletter subscriptions from the Contacts detail view using the Manage Subscriptions option in the Actions menu. Please note that you can only manage subscriptions for newsletter-type campaigns. A newsletter campaign you have created will have one or more default-type target lists. Contacts are added to these target lists in order to receive your newsletter. The Manage Subscriptions option allows you to add a contact to the default-type or suppression-type target lists of your newsletter campaigns without leaving the Contacts module. For more information on newsletter subscriptions, please refer to the Campaigns documentation.

Use the following steps to manage contact subscriptions via a contact's detail view:

1. Navigate to a contact record's detail view.
2. Select "Manage Subscriptions" from the Actions menu.

3. To add the contact to a newsletter subscription mailing list, select the newsletter from the Available/Newsletters Unsubscribed To list and drag it to the Newsletters Subscribed To list. This will add the contact to the campaign's default target list.
4. To remove the contact from the newsletter subscription mailing list, select the newsletter from the Newsletters Subscribed To list and drag it to the Available/Newsletters Unsubscribed To list. This will add them to the suppression-type unsubscription target list for the newsletter campaign which will prevent the contact from receiving the newsletter. Please note that the contact will not be removed from the campaign's default target list.

5. Click "Save" to preserve your changes.

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Accounts

Overview

Sugar's Accounts module consists of companies with whom your organization has a relationship and is generally seen as the hub for managing and analyzing your business' interactions with each customer. There are various ways you can create accounts in Sugar such as via the Accounts module, duplication, importing accounts, etc. Once the account record is created, you can view and edit information pertaining to the account via the Accounts detail view. Each account record may then relate to other Sugar records such as contacts, meetings, cases, opportunities, and many others as the customer's relationship matures. This documentation will cover how to use the Accounts module as well as the various actions and options available from within the module.

Account Fields

The Accounts module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the [Studio](#) documentation in the Administration guide.

Field	Description
Alternate Phone	The account's secondary phone number
Annual Revenue	The company's annual revenue
Assigned To	The Sugar user assigned to the account
Billing Address	The account's billing address
Campaign	The campaign, if any, from which the account originated
Copy Address From Left	Select the box to copy the account's billing address to the shipping address field
Date Created	The date the account record was created
Date Modified	The date the account record was last modified

Description	A description or other information about the account
Email Address	The account's email address
Employees	The number of employees at the company
Fax	The account's fax number
Industry	The industry type to which the company belongs
Name	When viewing, the account's name
Office Phone	The account's office number
Ownership	Indicate if the company is privately or publicly owned
Member Of	Designate a parent-child relationship between the account and another account in Sugar
Rating	The rating for the company compared to other companies in Sugar
Shipping Address	The account's shipping address
SIC Code	The Standard Industrial Classification (SIC) code for the account
Teams	The Sugar team(s) assigned to the account record
Ticker Symbol	The stock trading symbol for the company
Type	The account type (e.g. customer, investor, etc.)
Website	The website URL associated with the account

Accounts Module Tab

The Accounts module tab is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access the Accounts list view. You may also hover on the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of accounts you last viewed in the module. The Favorites menu displays the list of accounts you most recently marked as favorites in the module.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Account	Opens the edit view layout to create a new account
View Accounts	Opens the list view layout to search and display accounts
View Account Reports	Displays existing reports based on the Accounts module
Import Accounts	Opens the import wizard to create or update accounts using external data

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

- The top navigation bar may be filtered based on a specific tab grouping (e.g. Activities, Reports, etc.) of which the Accounts module is not a member. Click the More tab (last tab on navigation bar) then hover on "Filter Menu By" to check how the navigation bar is grouped. For more information on tab grouping, please refer to the User Interface documentation.
- The Accounts module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Accounts module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Accounts module for your entire Sugar instance. Reach out to your Sugar administrator to have the Accounts module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

Creating Accounts

There are various methods for creating accounts in Sugar including via the Accounts module, quick create, duplication,and importing accounts. The full edit view layout opens when creating the account directly from the Accounts menu and includes all of the relevant fields for your organization's accounts. The quick create form is a shortened version of the accounts edit view and typically contains fewer fields. Both the Edit View and Quick Create layouts can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#) documentation in the Administration guide.

Creating Via Accounts Module

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

1. Hover on the Accounts module and select "Create Account".

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

Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also quick create an account from any Accounts subpanel on related module records.
Use the following steps to create an account via Quick Create:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Account" or select "Create" on any Accounts subpanel on a related module's detail view.
   From Quick Create menu:

   From subpanel:

2. Enter appropriate values in the <u>fields</u> in the quick create form. All required fields are marked with a red asterisk and must be completed prior to saving.
3. If additional fields are desired, click the Full Form button to use edit view instead.
4. Once the necessary information is entered, click "Save".

Creating Via Duplication

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

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

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

Complete Holding ☆

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

Importing Accounts

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

Use the following steps to import accounts via the Import Accounts option:

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

2. In Step 1, select the import file and choose "Create new records only". Click "Next".
3. In Step 2, confirm the import file properties. Click "Next".
4. In Step 3, confirm the field mappings for the import. Click "Next".
5. In Step 5, view the import results.
   ◦ The Created Records tab will show all of the new account records.
   ◦ The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.

Viewing Accounts

There are various options available for viewing account records in Sugar including via Accounts list view, Accounts detail view, Accounts Recently Viewed menu, dashlets, and reports. Please note that you will only be able to see account records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

Viewing Via List View

The Accounts list view displays all account records meeting the current search criteria. To access the list view, simply click the Accounts module tab. While list view shows key account fields, you can click the account's name to open the record in detail view. For more information on viewing accounts via list view, please refer to the Accounts List View section of this documentation.

Viewing Via Detail View

The Accounts detail view displays thorough account information including all account fields followed by subpanels of the account's related records belonging to various modules. The detail view can be reached by clicking an account record's link from anywhere in the application including from the Accounts list view. For more information on viewing accounts via detail view, please refer to the Accounts Detail View section of this documentation.

Viewing Via Recently Viewed

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

Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets which allow users to get a quick view of various records, activities, reports, etc. You can view account information in account-based dashlets such as "My Accounts" as well as in dashlets based on other modules such as "My Calls". Clicking an account's name from any dashlet will open the account in detail view. For more information on using dashlets and viewing account records via dashlets, please refer to the Modules section of the Home documentation.

Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding accounts and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the account record's detail view by clicking the account's name in the report results. Please note that you can only directly access account detail views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation.

In addition to navigating to the Reports module and finding or building relevant reports, you can use the Account module tab's View Account Reports option to see all account-based reports to which you have access.
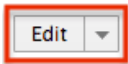
Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

Searching Accounts

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

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

Basic Search

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

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

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

- My Items : Select this box to return only records assigned to you.
- My Favorites : Select this box to return only records you have marked as favorites.

Search Accounts

| Name | | My Items ☐ My Favorites ☐ | Search | Clear | **Advanced Search** |

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

Administrators can configure what fields appear on the Accounts Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Advanced Search

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

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

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

often. For more information, please refer to the [Saved Search](#) section of the Search documentation.

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

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

Global Search

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

To use global search, you need to first enter the keyword into the search box. With Full Text Search enabled, pop-up results will begin appearing once you input three or more characters. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. When Full Text Search is not enabled, results starting with your keyword will appear after clicking the

magnifying glass icon or hitting your Return/Enter key. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

Accounts List View

The Accounts list view displays all account records meeting the current search criteria and to which your user has access. You can view the basic details of each account within the field columns. Please note that you will only be able to see account records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

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

Pagination

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

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

Checkbox Selection

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

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

Actions Menu

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

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

Menu Item	Description
Delete	Delete one or more accounts at a time

Email	Email one or more accounts at a time
Mass Update	Mass update one or more accounts at a time
Mail Merge	Perform a mail merge on one or more accounts at a time Note: This option only appears when Mail Merge is enabled at the system level and under the user's profile.
Merge	Merge two or more duplicate accounts
Add to Target List	Add one or more accounts to a target list
Export	Export one or more accounts to a CSV file

Favorite Designation

Users have the option to mark account records as favorites via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Accounts module tab. In the Accounts list view, the star on the left of each account's row is yellow once marked to indicate a favorite account. For more information on how to mark records as favorites, please refer to the Favoriting Accounts section of this documentation.

More Information

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

Column Sorting

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

Accounts Detail View

The Accounts detail view displays thorough account information including all account fields which are grouped by default into the Overview, More Information, and Other panels. You can also view an account's related records (Activities, Opportunities, Leads, etc.) which appear in subpanels beneath the account fields. The detail view can be reached by clicking an account record's link from anywhere in the application including from the Accounts list view.

Please note that you will only be able to view an account record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Actions Menu

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

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

Menu Item	Description
Edit	Edit this account
Duplicate	Duplicate this account
Delete	Delete this account
Find Duplicates	Locate potential duplicates of this account
Get Data	Search, view, and merge additional company data via Hoover's and/or Zoominfo connector
View Change Log	View a record of changes to this account

Favorite Designation

Users have the option to mark account records as a favorite via the detail view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Accounts module tab. In the Accounts detail view, the star on the right of the account's name is yellow once marked to indicate a favorite account. For more information on how to mark records as favorites, please refer to the Favoriting Accounts section of this documentation.

Copy Address

Users also have the option to copy the account's billing or shipping address to the related contact(s) by clicking the Copy icon in the address field. A pop-up window will open displaying the list of all related contacts to the account. Select the contact record(s) you wish to copy the account's address to, then choose either "Copy to Primary Address" or "Copy to Other Address". The copied address will appear in the primary or other address field of the related contact's detail view.

Next or Previous Record

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

Subpanels

Beneath an account record's fields are subpanels containing related records from various modules, campaign interaction history for this account, and the account's InsideView information.

Related Record Subpanels

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

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

Related record subpanels allow the following operations to be performed. Please note that administrators in Sugar can change the subpanel's Action menu to be displayed as separate buttons instead of a dropdown via Admin > System Settings. For more information, please refer to the [System](#) documentation in the Administration guide.

- To view the details of a related record, click the record's name in the subpanel to open it in detail view.
- To relate an existing record to the account, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the account, choose "Create" from the subpanel's Action menu, then complete the Quick Create form and click "Save".
- To delete the account's relationship to a record, choose "Unlink" from the dropdown on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

Please note that administrators can prevent users from moving subpanels to different locations in the detail view. For more information on preventing rearranging of subpanels, please refer to the [System](#) documentation in the Administration guide. Check with your system administrator if you are not able to rearrange your subpanels.

Activities and History Subpanels

The Activities subpanel lists open or upcoming tasks, calls, and meetings that are related to the account record. Once the activities have taken place or are completed, they will instead appear within the History subpanel. The History subpanel also includes notes and emails associated with the account record. For

more information on the history and activities subpanel, please refer to the User Interface documentation.

Campaigns Subpanel

The Campaigns subpanel contains historical information regarding an account record's interaction with all Sugar campaigns. When a mass marketing campaign is sent to an account (or manually marked as sent in the case of non-email campaigns), the related campaign activity information will appear within the Campaigns subpanel. This information mirrors the "View Status" page available from within each individual campaign and shows activities such as when a campaign was sent, when the recipient viewed the campaign message, when the recipient clicked a tracked link within the campaign, etc. Since this subpanel contains historical campaign interactions for the account, it cannot be used to associate an account with a campaign or otherwise manage a campaign or target list. For more information on associating an account with a campaign, please refer to the Adding Accounts to a Target List section of this documentation. For more information on campaigns, please refer to the Campaigns documentation.

InsideView Subpanel

The InsideView subpanel, if you are an InsideView user, provides relevant company information, news, and social media insights within your account's detail view. The InsideView subpanel will appear by default on the detail view. The panel can be minimized by clicking the double arrow next to "InsideView". For more

information on viewing account information via InsideView, please refer to the [User Interface](#) documentation. Administrators in Sugar also have the ability to disable InsideView for the entire instance so that it is not visible to users. For more information on disabling InsideView, please refer to the [Connectors](#) section of the System documentation in the Administration guide.

LinkedIn and Twitter Connector

The LinkedIn connector allows users in Sugar to view any connections they have to companies through LinkedIn. The Twitter connector allows users to view, reply, retweet, etc. to live Twitter feeds posted for the company. Users can simply click the LinkedIn and Twitter icons to the right of the account's name to view the account specific information if they wish. For more information on utilizing the connectors, please refer to the [Connectors](#) section of the User Interface documentation. Please note that the LinkedIn and Twitter connectors are enabled by default for the Accounts module. Administrators have the ability to disable the connectors via Admin > Connectors if they do not want it viewable by users. For more information on disabling connectors, please refer to the [Connectors](#) section of the System documentation in the Administration guide.

Editing Accounts

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

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

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

Administrators in Sugar may configure both the Accounts edit view and quick create via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

Editing Via Detail View

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

Editing Via List View

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

Editing Via Dashlets

You can edit accounts by clicking the pencil icon to the far right of any accounts-based dashlet on your Sugar home page. For example, clicking the pencil icon within the My Accounts dashlet will open a pop-up window with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. For more information on dashlets, please refer to the [Home](#) documentation.

Editing Via Reports

Sugar reports also allow you to edit an account record by clicking on the pencil icon next to an account's name. This opens a pop-up window with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. Please note that you may only directly edit accounts from Rows and Columns-type or Summation with

Details-type reports as Summation-type and Matrix-type reports do not include the pencil icon. For more information on reports, please refer to the [Reports](#) documentation.

Deleting Accounts

If an account record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Accounts detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting account records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

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

Deleting Via Detail View

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

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

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

Mass Deleting Via List View

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

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

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

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

Exporting Accounts

Sugar's Export option allows users to download all fields for the selected accounts to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Account data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered accounts back into Sugar. For more information on updating existing records via import, please refer to the [Import](#) documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of account records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

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

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

Mass Updating Accounts

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

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

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

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

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

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

Finding Duplicate Accounts

Between multiple users working in Sugar, importing new records, and converting leads, it is possible for duplicate account records to be accidentally input to the system. Before creating a new account record, a good practice is to first check that the account does not already exist in Sugar. You can locate duplicate records for cleanup using Basic and Advanced Search from the Accounts list view. Searching

for accounts with similar names or other information can turn search a powerful, duplicates-finding tool. Sugar also provides a wizard for finding potential duplicates that is available from the Accounts detail view and may be used as shown below. If duplicate account records are detected, you can perform a merge per the [Merging Accounts](#) section of this documentation.

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

Use the following steps to locate duplicate accounts using the Find Duplicates option from the Account detail view:

1. Navigate to an account record's detail view.
2. Choose "Find Duplicates" from the Actions menu.

3. Move any fields you wish to use in identifying duplicates to the list on the right by selecting the field and clicking the arrow.

4. Click "Next Step" to display a list of potential duplicate account records which match all of the specified filters.

Once you determine which accounts of the resulting list are indeed duplicates of

your original record, select the duplicates by marking the checkboxes, then click "Perform Merge" to begin a merge with the current record. Instructions for the merge process that follows can be found in the [Merging Via Detail View](#) section of this documentation.

Merging Accounts

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

Merging Via Detail View

Use the following steps to merge accounts via the Accounts detail view:

1. Navigate to an account record's detail view.
2. Use the Find Duplicates option as shown in [Finding Duplicate Accounts](#) to identify duplicate accounts.
3. Possible duplicates will be displayed in the results list. Select the duplicate record(s).

4. Click "Perform Merge" to display the Merge Accounts page. The primary record's field values are displayed on the left while other records' values are in columns to the right. Saving the merge will preserve only the leftmost values for each field into a single account record.

5. To change which record is considered the primary, click the "Set as primary" double arrows.
6. Review the field values in each column and use the associated double arrows to move the best value for each field to the leftmost column.
7. Click "Save Merge" once the left column contains all fields you wish to appear on the single, merged record.
8. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Ok" to proceed.

Merging Via List View

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

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

1. Use the list view's Basicor Advanced Search to identify duplicate accounts.
2. Possible duplicates will be displayed in the list view. Select the duplicate record(s) that you wish to merge.

3. Select "Merge" from the Actions menu to display the Merge Accounts page. The primary record's field values are displayed on the left while other record's values are in columns to the right. Saving the merge will preserve only the leftmost values for each field into a single account record.

4. To change which record is considered the primary, click the "Set as primary" double arrows.
5. Review the field values in each column and use the associated double arrows to move the best value for each field to the leftmost column.
6. Click "Save Merge" once the left column contains all fields you wish to appear on the single, merged record.
7. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Ok" to proceed.

Favoriting Accounts

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

Favoriting Via List View

Use the following steps to mark records as favorites via the Accounts list view:

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

Favoriting Via Detail View

Use the following steps to mark records as favorites via the Accounts detail view:

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

Viewing Account Change Logs

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

Emailing Accounts

Sugar allows users to compose and send outbound emails to accounts. There are various ways to send outbound mail to accounts including emailing via the Emails module, Emails quick compose, Accounts module, campaigns, and workflows. Please note that administrators in Sugar must first configure the outbound mail server for the system via Admin > Email Settings in order for users to send outbound emails. For more information on setting up the system email settings, please refer to the Emails documentation in the Administration guide. Users will also need to have their email settings configured in their user preferences prior to sending outbound email from the Emails module, Emails quick compose, or Accounts module. For more information on setting up your user preferences' email settings, please refer to the Getting Started documentation.

Emailing Via the Emails Module

Use the following steps to compose and send an email to an account via the Emails module. For more detailed information on sending emails via the Emails module, please refer to the Emails documentation.

1. Navigate to the Emails module by clicking the Emails module tab.
2. Click the Compose button on the upper left of the Emails module.

3. For the "Related To" field, select "Accounts" as the module then type or select the desired account's name. The email's To field will automatically populate with the name and email address of the selected account record.
4. Enter a subject and body for the email message then click "Send".

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

Emailing Via Quick Compose

The quick compose option allows users to compose emails from various places in Sugar without navigating away from the current page.

While viewing an account record, you can select "Send Email" from the Quick Create menu on the top right of any Sugar page. Quick creating an email while viewing an account record's detail view automatically populates the To field with the account's name and email address as well as relating the email to the account record.

Users can also use Quick Compose by clicking an account's email address anywhere it is displayed as a link. Clicking the email address automatically populates the To field with the account's name and email address as well as relating the email to the account record.

Quick Compose is also available from the Activities subpanel in an account's detail view. Choosing "Compose Email" from the Actions menu automatically populates the To field with the account's name and email address as well as relating the email to the account record.

Once the email is sent successfully, the email record will appear in the History subpanel of the account record. For more information on sending emails via quick compose, please refer to the [Emails](#) documentation.

Emailing Via Accounts List View

One or more accounts may be emailed at a time from the Accounts list view. For more information on sending emails via the Accounts list view, please refer to the documentation.

Use the following steps to compose and send an email from the Accounts list view:

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the [Basic](#) or [Advanced Search](#) to find the Account records you wish to include on the email.
3. Select the desired accounts individually or using the [checkbox dropdown's](#) options.
4. Select "Email" from the Actions menu.

5. In the Quick Compose email template, enter in the subject and body of the email message, then click "Send".
   The To field will be automatically populated with the name and email address of the selected account record(s).

Once the email is sent successfully, the email record will appear in the History

subpanel of the account record(s).

Emailing Via Campaigns

Sugar's Campaigns module can be used to create email and newsletter campaigns to send mass emails to a relevant set of accounts. Email-type campaigns are mass emails sent to a target list while newsletter-type campaigns are a series of mass emails sent to a consistent or growing target list periodically or on a regular basis. For more information on sending mass emails to accounts via a campaign, please refer to the Campaigns documentation.

Emailing Via Workflows

Sugar's Workflow module enables you to automate tasks, send email alerts, and execute various actions. With each workflow, a set of conditions trigger a combination of actions and email alerts potentially including alerts to account records. You also can create alert email templates used by workflows to insert relevent data to the automated email notifications. For more information on workflow email notifications, please refer to the Email Alert section of the Workflows documentation.

Adding Accounts to a Target List

A target list consists of a group of individuals or organizations you wish to be included or excluded on a mass marketing campaign. These targets are typically identified based on a set of predetermined criteria such as being a prospect or existing customer, age group, industry, etc. There are various ways to add accounts to a target list in Sugar including using the Add to Target List option from the Account list view's Actions menu. For more information on target lists and other methods of adding accounts, please refer to the Target Lists documentation. Due to the PHP memory limitations on the server, there may be occasions when the application times out while adding account records to a target list. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

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

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the Basic or Advanced Search to find the Account records you wish to add to a target list.
3. Select the desired account records individually or using the checkbox dropdown's options.
4. Choose "Add to Target List" from the Actions menu.

5. Locate and select the desired target list in the pop-up window or click "Create Target List" to add to a new target list.

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

Connectors

Connectors in Sugar allow the system to connect existing account records in Sugar to external applications such as Hoovers and Zoominfo. Users can search, view, and merge additional data for the account from the specific data source by selecting "Get Data" from the Actions menu of the Accounts detail view. For more information on utilizing the connectors to get data, please refer to the [Get Data](#) section of the User Interface documentation. Please note that the Zoominfo connector is not enabled by default for the Accounts module. Administrators must first enable the connector via Admin > Connectors in order to search and view data from Zoominfo via the Get Data option. For more information on enabling connectors, please refer to the [Enabling Connectors](#) section of the System documentation in the Administration guide.

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Opportunities

Overview

Sugar's Opportunities module allows you to track individual sales from start to finish. Each opportunity record represents a prospective sale and includes relevant sale data as well as relating to other important records such as quotes, contacts, etc. An opportunity will typically progress through several Sales Stages until it is marked either "Closed Won" or "Closed Lost".

Opportunities can be leveraged even further by using Sugar's Forecasting module to understand and predict sales trends as well as focus work to achieve sales quotas. For more information on the Forecasts module, please refer to the [Forecasts](#) documentation.

Opportunity Fields

The Opportunities module contains a number of stock fields which come out-of-the-box with Sugar. The following definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the [Studio](#) documentation in the Administration guide.

Field	Description
Account Name	The account to which the opportunity belongs
Assigned to	The Sugar user assigned to the opportunity
Campaign	The campaign, if any, from which the opportunity originated Note: This is an optional field as not all opportunities will have a campaign.
Converted Amount	The amount of the opportunity converted to and displayed in the system's default currency or the user's preferred currency when the Show Preferred Currency option is enabled on the viewing user's profile Note: This field is only available in the list view. For more information on the Converted Amount field, please see [Transaction Amount Field Vs. Converted Amount Field](#)
Currency	The currency used to define the transaction amount
Date Created	The date the opportunity record was created
Date Modified	The date the opportunity record was last modified
Description	A description or other information about the opportunity
Expected Close Date	The opportunity's expected or actual close date
Lead Source	The source (e.g. Trade Show) from which the opportunity originated
Next Step	The succeeding stage of the opportunity's sales cycle
Opportunity Name	The name of the opportunity
Probability (%)	The opportunity's current probability of being won Note: This is a system-generated value

	based on the selected Sales Stage.
Sales Stage	The opportunity's current sales stage (e.g. Prospecting, Qualification, etc.)
Teams	The Sugar team(s) assigned to the opportunity record
Transaction Amount	The transactional amount of the opportunity which may use any currency configured within Sugar Note: For more information on the Transaction Amount field, please see [Transaction Amount Field Vs. Converted Amount Field](#)
Type	The type (e.g. new business, existing business) of opportunity

Sales Stages

A sales stage identifies the current stage (e.g. Prospecting, Qualification, etc.) that the opportunity is in during the sales cycle. When you select a sales stage in the opportunity record, the system automatically populates the corresponding probability value (e.g. 10, 20, etc.) in the Probability (%) field. These probability values are a useful tool as it helps calculate and predict your sales forecast for a specified time period. For more information on the Forecasts module, please refer to the [Forecasts](#) documentation. Administrators have the ability to configure the sales stage and probability values for each sales stage via Admin > Dropdown Editor. For more information on configuring the sales stages and probability values, please refer to the [Developer Tools](#) documentation in the Administration guide.

Please note that the below values are only guidelines for defining your sales stage and you can skip one or more stages based on your organization's needs.

Sales Stage Value	Probability (%)	Description
Prospecting	10	Sales representative is reviewing and qualifying the opportunity Note: This is the first stage of the sales process, which indicates that the opportunity with this

		prospect is new.
Qualification	20	Sales representative is interacting with the prospect to determine if a sales opportunity exists
Needs Analysis	25	Sales representative understands that the prospect is interested in the product(s)/service(s) and is identifying the prospect's business problems
Value Proposition	30	Sales representative is mapping the company's products and/or services to the prospect's business problems and describes the value of the solution
Id. Decision Makers	40	Sales representative identifies the decision makers necessary to close this opportunity after determining there is a match between the prospect's business problems and the company's products and/or services
Perception Analysis	50	Sales representative is analyzing the prospect's perceived value of the company's solution to prepare the appropriate combination of products and services for a sales quote
Proposal/Price Quote	65	Sales representative is delivering the proposal (i.e. price quote) to the prospect
Negotiation/Review	80	Sales representative is reviewing and negotiating the proposal with the

		prospect
Closed Won	100	Sales representative has won this opportunity and the client can be billed
Closed Lost	0	Sales representative has lost this opportunity

Opportunities Module Tab

The Opportunities module tab is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access the Opportunities list view. You may also hover on the tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of opportunities you last viewed in the module. The Favorites menu displays the list of opportunities you most recently marked as favorites in the module.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Opportunity	Opens the edit view layout to create a new opportunity
View Opportunities	Opens the list view layout to search and display opportunities
View Opportunity Reports	Displays existing reports based on the Opportunities module
Import Opportunities	Opens the import wizard to create or update opportunities using external data

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

- The top navigation bar may be filtered based on a specific tab grouping (e.g. Activities, Reports, etc.) of which the Opportunities module is not a member. Click the More tab (last tab on navigation bar) then hover on "Filter Menu By" to check how the navigation bar is grouped. For more information on tab grouping, please refer to the User Interface documentation.
- The Opportunities module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Opportunities module in the Hide Modules list, simply move it to the Display Modules list and save. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Opportunities module for your entire Sugar instance. Reach out to your Sugar administrator to have the Opportunities module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

Creating Opportunities

There are various methods for creating opportunities in Sugar including via the Opportunities module, Quotes module, quick create, duplication, emails, importing opportunities, and lead conversion. The full edit view layout opens when creating the opportunity directly from the Opportunities menu and includes all of the relevant fields for your organization's opportunities. The quick create form is a shortened version of the opportunities edit view and typically contains fewer fields. When using quick create to make an opportunity while viewing an existing record of another module, Sugar automatically creates a relationship between both records. For example, if you are viewing an account record (e.g. ABC Company) and create a new opportunity via the quick create form, the Account Name field in the opportunity record will automatically populate with "ABC Company", thus creating the relationship. Both the Edit View and Quick Create layouts can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

Creating Via Opportunities Module

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

1. Hover on the Opportunities module and select "Create Opportunity".

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

Creating Via Quotes Module

As you interact with your client and present the quote for your products and services, you can easily create an opportunity from the Quotes detail view to better track your sales. The displayed Opportunity detail view is pre-populated with the original quote's values to display the opportunity name, transaction amount, account name, and expected close date. By default, the sales stage is set to "Proposal/Price Quote", the probability is "65%", the type is "New Business", and the lead source is "Self Generated". You can edit the opportunity record accordingly if you wish to change any of these default values. Please note that the opportunity record will automatically be associated to the original quote. For more information on creating an opportunity from a quote, please refer to the [Creating Opportunities from Quotes](#) section of the Quotes documentation.

Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also quick create an opportunity from any Opportunities subpanel on related module records.
Use the following steps to create an opportunity via Quick Create:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Opportunity" or select "Create" on any Opportunities subpanel on a related module's detail view.

From Quick Create menu:

From subpanel:

2. Enter appropriate values in the [fields](#) in the quick create form. All required fields are marked with a red asterisk and must be completed prior to saving.
3. If additional fields are desired, click the Full Form button to use edit view instead.
4. Once the necessary information is entered, click "Save".

Creating Via Duplication

You can also create a new opportunity by duplicating an existing opportunity record. The duplicate option is useful if the opportunity you are creating has similar information to an existing opportunity. Please note that existing subpanel relationships for the original opportunity record will not carry over to the duplicated opportunity record.

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

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

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

Creating Via Emails

The Emails module enables users to create new opportunity records from external and imported emails using the Quick Create option. Simply click the Quick Create button above the selected email header then select "Opportunity".

A pop-up window will open with the quick create form where you can enter relevant values for the new opportunity. The Opportunity Name and Description fields are populated by default based on the emails subject and body. All required fields are marked with a red asterisk and must be completed prior to saving. Once the necessary information is entered, click "Save". For more information on how to create, send, and manage emails, please refer to the [Emails](#) documentation.

Please note that the selected email will be imported, if not already, and automatically related to the new opportunity. The email record will appear within the History subpanel of the Opportunities detail view.

Importing Opportunities

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

Use the following steps to import opportunities via the Import Opportunities option:

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

2. In Step 1, select the import file and choose "Create new records only". Click "Next".
3. In Step 2, confirm the import file properties. Click "Next".
4. In Step 3, confirm the field mappings for the import. Click "Next".
5. In Step 5, view the import results.
   - The Created Records tab will show all of the new opportunity records.
   - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
   - The Errors tab will show records that were not imported due to errors detected during import.

Creating via Lead Conversion

Sugar enables you to create a new opportunity record during the lead conversion process. Please note that opportunities may or may not be available for creation during lead conversion depending on the options configured by the administrator via Admin > Studio. Administrators also have the ability to configure what fields appear on the Create Opportunity section of the convert layout page via Admin > Studio. For more information on configuring the convert lead layout, please refer to the Studio documentation in the Administration guide.

Use the following steps to create an opportunity during lead conversion:

1. Navigate to a lead record's detail view.
2. Select "Convert Lead" from the Actions menu.
3. Select the Create Opportunity checkbox.

4. Enter the relevant information for the opportunity then click "Save".

Viewing Opportunities

There are various options available for viewing opportunity records in Sugar including via Opportunities list view, Opportunities detail view, Opportunities Recently Viewed menu, d ashlets, and reports.Please note that you will only be able to see opportunity records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

Viewing Via List View

The Opportunities list view displays all opportunity records meeting the current search criteria. To access the list view, you can simply click the Opportunities module tab or hover on the tab then select "View Opportunities". While list view shows key opportunity fields, you can click the opportunity's name to open the record in detail view. For more information on viewing opportunities via list view, please refer to the Opportunities List View section.

Viewing Via Detail View

The Opportunities detail view displays thorough opportunity information including all opportunity fields followed by subpanels of the opportunity's related records

belonging to various modules. The detail view can be reached by clicking an opportunity record's link from anywhere in the application including from the Opportunities list view. For more information on viewing opportunities via detail view, please refer to the [Opportunities Detail View](#) section.

Viewing Via Recently Viewed

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

Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets which allow users to get a quick view of various records, activities, reports, etc. You can view opportunity information in opportunity-based dashlets such as "My Top Open Opportunities" as well as in dashlets based on other modules such as "My Calls". Clicking an opportunity's name from any dashlet will open the opportunity in detail view. For more information on using dashlets and viewing opportunity records via dashlets, please refer to the [Modules](#) section of the Home documentation.

Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding opportunities and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the opportunity record's detail view by clicking the

opportunity's name in the report results. Please note that you can only directly access opportunity detail views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the [Reports](#) documentation.

In addition to navigating to the Reports module and finding or building relevant reports, you can use the Opportunities module tab's View Opportunity Reports option to see all opportunity-based reports to which you have access.

Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

Viewing Via Forecasts

Sugar's Forecasts module incorporates opportunity records to build forecasting worksheets and predict sales. Forecasts are based on the monetary value of the opportunities in Sugar. Users can work towards sales quotas at the individual, team, and sales organization level.Before users can access the Forecasts module to begin building forecasting worksheets, a user with administrator access must configure the Forecasts module with the organization's desired Time Periods, Ranges, and Scenarios. For more information on setting up the Forecasts module, please refer to the [Forecast Configuration](#) documentation in the Administration Guide.

Based on the chosen filters (include, exclude, etc.), you will see all or some of your assigned opportunities for the currently selected time period. The Forecast column displays an automatic category indicating whether or not the opportunity's

amounts are included in the totals for the specified time period . You can work directly with your opportunity records by in-lineediting their probabilities and amounts from the Forecasts module or by clicking the Name field to open a record in the Opportunities module where you can make additional edits. For more information on editing and managing forecasts, please refer to the [Forecasts](#) documentation.

Time Periods: Q2 2013 ⇕ 04/01/2013 06/30/2013

Forecast Worksheet for: Max Jensen (Direct) **Quota:** $500   [Save Worksheet] [Reset Worksheet] [View Chart]

|◁ ◁ (1 - 4 of 4) ▷ ▷|

Opportunity ⇕	Amount ⇕	Probability ⇕	Weighted Amount ⇕	Est. Best Case	Est. Likely Case	Est. Worst Case
ⓘ 24/7 Couriers - 1000 units	$75,000	60	$45,000	45000	30000	15000
ⓘ 5D Investments - 1000 units	$60,000	10	$6,000	6000	5500	3000
ⓘ Arts & Crafts Inc - 1000 units	$50,000	10	$5,000	5000	5000	4000
ⓘ RRR Advertising Inc. - 1000 units	$50,000	40	$20,000	20000	17000	10000
Totals:	$235,000		$76,000	76000	57500	32000

Searching Opportunities

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

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

Basic Search

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

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

- **Search :** Click the Search button or press your Return/Enter key to perform the search.
- **Clear :** Click the Clear button to clear all criteria from the searchable fields.
- **My Items :** Select this box to return only records assigned to you.
- **My Favorites :** Select this box to return only records you have marked as favorites.
- **Open Items :** Select this box to return only records with an open sales stage (e.g. Prospecting, Proposal/Price Quote, etc.).

Schedulers

Job Name		Search	Clear

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

Administrators can configure what fields appear on the Opportunities Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Advanced Search

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

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

- **Search :** Click the Search button or press your Return/Enter key to perform

the search.

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

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

Administrators can configure what fields appear on the Opportunities Advanced Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Global Search

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

To use global search, you need to first enter the keyword (e.g. Opportunity Name) into the search box. With Full Text Search enabled, pop-up results will begin appearing once you input three or more characters. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. When Full Text Search is not enabled, results starting with your keyword will appear after clicking the magnifying glass icon or hitting your Return/Enter key. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results. For more information on configuring your Global Search, please refer to the Search documentation.Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

Opportunities List View

The Opportunities list view displays all opportunity records meeting the current search criteria and to which your user has access. You can view the basic details of each opportunity within the field columns. Please note that you will only be able to see opportunity records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

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

the Administration guide.

Pagination

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

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

Checkbox Selection

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

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

Actions Menu

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

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

Menu Item	Description
Delete	Delete one or more opportunities at a time
Mass Update	Mass update two or more opportunities at a time
Merge	Merge two or more duplicate opportunities
Export	Export one or more opportunities to a CSV file

Favorite Designation

Users have the option to mark opportunity records as favorites via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Opportunities module tab. In the Opportunities list view, the star on the left of each opportunity's row is yellow once marked to indicate a favorite opportunity. For more information on marking records as favorites, please refer to the Favoriting Opportunities section of this documentation.

More Information

Additional details for each opportunity can be viewed by clicking the "i" icon to the far right of each list view row. This provides users a quick view of additional opportunity information in addition to what appears in the display column fields. The resulting pop-up window will show the Lead Source, Probability, Next Step, Type, and Description fields by default. The list of fields appearing here may only be configured through a code-level customization.

Column Sorting

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

Transaction Amount Field Vs. Converted Amount Field

The stock Opportunities list view contains two fields, Transaction Amount and Converted Amount, that differ in functionality. When the viewing user's Show Preferred Currency option is selected in their user profile, the Converted Amount field will be displayed in the user's preferred currency. When it is unchecked, the Converted Amount field will be displayed in the system default currency. For information about setting a user's Preferred Currency and Show Preferred Currency options, please refer to the User Profile documentation.

The primary differences between these fields and options are as follows:

Field Name	Value Displayed	Sortable in List View	Method to Update Value
Transaction Amount	Transactional amount; the currency and value in which the opportunity was last saved	No; since this field may include values using different currencies, numerical sorting would not result in a valid ordering of the comparative amounts	Updated by editing the opportunity record
Converted Amount (system default currency)	Transaction Amount converted to the system default currency based on the system-defined conversion rate	Yes; since all possible values use a single currency, sorting is allowed	Updated by a scheduled process when the relevant exchange rate is modified via Admin > Currencies. For more information on how currency changes affect the Converted Amount value please see [Updating Currency Rates](#)
Converted Amount (user's preferred currency)	Transaction Amount converted to the viewing user's preferred currency as specified in their user profile based on the system-defined conversion rate	Yes; since all possible values use a single currency, sorting is allowed	Updated by modifying the relevant exchange rate via Admin > Currencies. For more information on how currency changes affect the Converted Amount value please see [Updating Currency Rates](#)

Opportunities Detail View

The Opportunities detail view displays thorough opportunity information including all opportunity fields which are grouped by default into two separate panels. You can also view an opportunity's related records (Activities, Contacts, Leads, etc.) which appear in [subpanels](#) beneath the opportunity fields. The detail view can be

reached by clicking an opportunity record's link from anywhere in the application including from the Opportunities list view.

Please note that you will only be able to view an opportunity record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Actions Menu

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

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

Menu Item	Description
Edit	Edit this opportunity
Duplicate	Duplicate this opportunity
Delete	Delete this opportunity
Find Duplicates	Locate potential duplicates of this opportunity
View Change Log	View a record of changes to this opportunity

Favorite Designation

Users have the option to mark opportunity records as a favorite via the detail view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Opportunities module tab. In the Opportunities detail view, the star on the right of the opportunity's name is yellow once marked to indicate a favorite opportunity. For more information on how to mark records as favorites, please refer to the [Favoriting Opportunities](#) section of this documentation.

24/7 Couriers - 1000 units ⭐

Edit ▾

Opportunity Name: 24/7 Couriers - 1000 units

Next or Previous Record

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

24/7 Couriers - 1000 units ☆

Edit ▾   ◁ (1 of 53) ▷

Opportunity Name: 24/7 Couriers - 1000 units   Account Name: 24/7 Couriers

Subpanels

Beneath an opportunity record's fields are subpanels containing related records from various modules and the opportunity's InsideView information.

Related Record Subpanels

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

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

Related record subpanels allow the following operations to be performed. Please note that administrators in Sugar can change the subpanel's Action menu to be displayed as separate buttons instead of a dropdown via Admin > System Settings. For more information, please refer to the [System](#) documentation in the Administration guide.

- To view the details of a related record, click the record's name in the subpanel to open it in detail view.
- To relate an existing record to the opportunity, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the opportunity, choose "Create" from the subpanel's Action menu, then complete the Quick Create form and click "Save".
- To delete the opportunity's relationship to a record, choose "Unlink" from the dropdown on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

Please note that administrators can prevent users from moving subpanels to different locations in the detail view. For more information on preventing rearranging of subpanels, please refer to the [System](#) documentation in the Administration guide. Check with your system administrator if you are not able to rearrange your subpanels.

Contacts Subpanel

The Contacts subpanel for opportunities allows users to select a role (e.g. Primary Decision Maker, Business Evaluator, etc.) for each related contact to help you classify how each individual will ultimately factor into the buying decision. To

select a role, simply click "Edit" on the far right of the contact record's row in the subpanel and the role selection form will display. Please note that unlike the other subpanels (e.g. Leads, Quotes, etc.), the edit option for contacts does not open the actual edit view layout for the module. Select the appropriate role for the contact then click "Save" and the chosen role will display in the Contacts subpanel of the opportunity record.

Activities and History Subpanels

The Activities subpanel lists open or upcoming tasks, calls, and meetings that are related to the opportunity record. Once the activities have taken place or are completed, they will instead appear within the History subpanel. The History subpanel also includes notes and emails associated with the opportunity record. For more information on the history and activities subpanel, please refer to the User Interface documentation.

InsideView Subpanel

The InsideView subpanel, if you are an InsideView user, provides relevant company information, news, and social media insights within your opportunity's detail view. The InsideView subpanel will appear by default on the detail view. The panel can be minimized by clicking the double arrow next to "InsideView". For more information on viewing opportunity information via InsideView, please refer to the User Interface documentation. Administrators in Sugar also have the ability to disable InsideView for the entire instance so that it is not visible to users. For

more information on disabling InsideView, please refer to the [Connectors](#) section of the System documentation in the Administration guide.

Editing Opportunities

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

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

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

Administrators in Sugar may configure both the Opportunities edit view and quick create via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

Editing Via Detail View

You can edit opportunities via the detail view by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve your changes.

Editing Via List View

You can edit opportunities via the list view by clicking the Pencil icon to the left of each opportunity's name. A pop-up window will open with the quick create form which is a shortened version of the edit view layout. I f additional fields are desired, click the Full Form button to use edit view instead. Update the necessary fields, then click "Save" to preserve your changes.

Editing Via Dashlets

You can edit opportunities by clicking the pencil icon to the far right of any opportunities-based dashlet on your Sugar home page. For example, clicking the pencil icon within the My Top Open Opportunities dashlet will open a pop-up window with the quick create form which is a shortened version of the edit view

layout. If additional fields are desired, click the Full Form button to use edit view instead. Update the necessary fields, then click "Save" to preserve the changes. For more information on dashlets, please refer to the [Home] documentation.

Editing Via Reports

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

Please note that your ability to access and edit reports may be restricted by a role. For more information on roles, please refer to the [Role Management] documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

Deleting Opportunities

If an opportunity record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Opportunities detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting opportunity records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

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

Deleting Via Detail View

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

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

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

Mass Deleting Via List View

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

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

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

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

Exporting Opportunities

Sugar's Export option allows users to download all fields for the selected opportunities to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Opportunity data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered opportunities back into Sugar. For more information on updating existing records via import, please refer to the Import documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of opportunity records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

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

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

Mass Updating Opportunities

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

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

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

1. Navigate to the Opportunities list view by clicking the Opportunities module tab.

2. Use the list view's [Basic](#) or [Advanced Search](#) to find opportunities you wish to modify.
3. Select the desired opportunities individually or using the[checkbox dropdown's](#) options.
4. Choose "Mass Update" from the Actions menu.

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

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

Finding Duplicate Opportunities

Between multiple users working in Sugar, importing new records, and converting leads, it is possible for duplicate opportunity records to be accidentally input to the system. Before creating a new opportunity record, a good practice is to first check that the opportunity does not already exist in Sugar. You can locate duplicate records for cleanup using [Basic](#) and [Advanced Search](#) from the Opportunities list view.Searching for opportunities with similar names, related accounts, or other information can turn search into a powerful, duplicates-finding tool. Sugar also provides a wizard for finding potential duplicates that is available from the Opportunities detail view and may be used as shown below. If duplicate

opportunity records are detected, you can perform a merge per the [Merging Opportunities](#) section of this documentation.

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

Use the following steps to locate duplicate opportunities using the Find Duplicates option from the Opportunity detail view:

1. Navigate to an opportunity record's detail view.
2. Choose "Find Duplicates" from the Actions menu.

   5D Investments - 1000 units ☆

   Edit ▼
   Duplicate
   Delete   ity Name: 5D Investments - 1000 units
   Find Duplicates   (USD $): 10,000.00

3. Move any fields you wish to use in identifying duplicates to the list on the right by selecting the field and clicking the arrow.

   Next Step >   Cancel
   Available Fields: Filter Condition:
   Type
   Lead Source
   Next Step
   Sales Stage
   Probability (%)   ▶ ⊖ Opportunity Name: Contains ⬍ 5D Investments – 10

4. Click "Next Step" to display a list of potential duplicate opportunity records which match all of the specified filters.

Name ⇕	Account Name ⇕
☐ ☆ ✎ 5D Investments - 1000 units	5D Investments
☐ ▾	

   Perform Merge   Cancel

Once you determine which opportunities of the resulting list are indeed duplicates of your original record, select the duplicates by marking the checkboxes, then click "Perform Merge" to begin a merge with the current record. Instructions for the merge process that follows can be found in the [Merging Via Detail View](#) section of this documentation.

Merging Opportunities

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

Merging Via Detail View

Use the following steps to merge opportunities via the Opportunities detail view:

1. Navigate to an opportunity record's detail view.
2. Use the Find Duplicates option as shown in [Finding Duplicate Opportunities](#) to identify duplicate opportunities.
3. Possible duplicates will be displayed in the results list. Select the duplicate record(s).

4. Click "Perform Merge" to display the Merge Opportunities page. The primary record's field values are displayed on the left while other records' values are in columns to the right. Saving the merge will preserve only the leftmost values for each field into a single opportunity record.

5. To change which record is considered the primary, click the "Set as primary" double arrows.
6. Review the field values in each column and use the associated double arrows

to move the best value for each field to the leftmost column.

7. Click "Save Merge" once the left column contains all fields you wish to appear on the single, merged record.
8. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Ok" to proceed.

Merging Via List View

Basic and Advanced Search may be used to identify duplicate opportunities by, for example, searching for opportunities with similar names or related accounts. Once your search has identified duplicate opportunities, you can merge them directly from the Opportunities list view.

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

1. Use the list view's Basic or Advanced Search to identify duplicate opportunities.
2. Possible duplicates will be displayed in the list view. Select the duplicate record(s) that you wish to merge.

3. Select "Merge" from the Actions menu to display the Merge Opportunities page. The primary record's field values are displayed on the left while other record's values are in columns to the right. Saving the merge will preserve only the leftmost values for each field into a single opportunity record.

4. To change which record is considered the primary, click the "Set as primary" double arrows.
5. Review the field values in each column and use the associated double arrows to move the best value for each field to the leftmost column.

6. Click "Save Merge" once the left column contains all fields you wish to appear on the single, merged record.
7. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Ok" to proceed.

Favoriting Opportunities

Each Sugar user has the option to designate their own favorite opportunities which are important or will be viewed often. Once records are marked as favorites, use the My Favorites checkbox in the Opportunities Basic or Advanced Search to retrieve your favorites or select from your most recent favorites directly from the .

Favoriting Via List View

Use the following steps to mark records as favorites via the Opportunities list view:

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

Name ⇕	Account Name ⇕	Sales Stage ⇕	Amount ⇕
⭐ ✎ X-Sell Holdings - 1000 units	X-Sell Holdings	Prospecting	$10,000.00
⭐ ✎ Waverly Trading House - 1000 units	Waverly Trading House	Perception Analysis	$25,000.00

Favoriting Via Detail View

Use the following steps to mark records as favorites via the Opportunities detail view:

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

Viewing Opportunity Change Logs

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

Updating Currency Rates

When saving an opportunity in a currency that differs from the system-defined default currency, Sugar will store the conversion rate for that currency at the record level. This conversion rate is used to calculate the Converted Amount when the field is set to use the system default currency (as opposed to the user's preferred currency which is explained below). To keep amounts historically accurate, the conversion rate will only update on an opportunity provided the sales stage is not set to "Closed Won" or "Closed Lost". If the opportunity is in any other sales stage, the conversion rate will update under the following scenarios:

- The opportunity undergoes a save event (e.g. mass update, manual save, etc.) and the record's currency has a different conversion rate defined in Admin > Currencies than is currently saved in the opportunity.
- An administrator updates the currency exchange rate under Admin > Currencies. This will trigger a scheduled job which updates all opportunities saved with that currency to the new rate.

When the viewing user's profile has the Show Preferred Currency option selected, the Converted Amount field displays the Transactional Amount in the user's

preferred currency. In this case, the conversion rate used to calculate the Converted Amount's value is drawn directly from the conversion rate at the system level rather than any conversion rate stored on the record. This means that the value will always use the current conversion rate regardless of the opportunity's sales stage. For this reason, the Converted Amount field should not be considered historically accurate for closed opportunities when it is using the user's preferred currency. For information about setting a user's Preferred Currency and Show Preferred Currency options, please refer to the [User Profile](#) documentation.

For more information about currency exchange rates, please refer to the [Currencies](#) documentation in the Administration guide.

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Forecasts

Overview

Sugar's Forecasts module incorporates opportunity records to build forecasting worksheets and predict sales. Users can work towards sales quotas at the individual, team, and sales organization level.

Before users can access the Forecasts module to begin building forecasting worksheets, a user with administrator access must configure the Forecasts module with the organization's desired Time Periods, Ranges, and Scenarios. For more information on setting up the Forecasts module, please refer to the [Forecast Configuration](#) documentation in the Administration Guide.

Sales representatives use the Forecasts module to work with their assigned opportunities as the current time period progresses. These users will commit total predictions for their personal sales based on the opportunities they expect to close. For instructions specific to a sales representative's use of the module, please refer to the [Sales Representative](#) section of this documentation.

Sales managers work with their own opportunity records similarly to other sales representatives. In addition, they aggregate their reportee's committed forecast amounts to predict their total team's sales and work towards the team's quota for each time period. For instructions specific to a sales manager's use of the module, please refer to the [Sales Managers](#) section of this documentation.

Additional insights are offered by the elements of the expandable Intelligence Pane including analysis for an individual's opportunities worksheet and analysis for a manager's team worksheets. For more information, please refer to the [sales](#)

[representative Intelligence Pane](#) and the [sales manager Intelligence Pane](#) sections of this documentation.

Forecast Fields

The Forecasts module contains the following fields which enable users to work with opportunity records to forecast sales for a given time period:

Field	Description
Forecast	"Included", "Excluded", or "Upside" (optional) based on the opportunity's initial probability and the user's edits; controls whether the opportunity is counted in the forecast's totals and allows for filtering; can be edited in-line from the Forecasts module
Name	The opportunity's name; can be edited from the Opportunities module
Expected Close	The opportunity's expected date of completion; used to aggregate opportunities to the relevant time period; can be edited from the Opportunities module
Stage	The opportunity's current sales stage; can be edited from the Opportunities module
Probability	The opportunity's current probability of being won; can be edited in-line from the Forecasts module
Likely Case	The opportunity's Transaction Amount field; can be edited in-line from the Forecasts module
Best Case	(Optional) The opportunity's most optimistic total amount; can be edited in-line from the Forecasts module
Worst Case	(Optional) The opportunity's least optimistic total amount; can be edited in-line from the Forecasts module

Forecasts Module Tab

The Forecasts module tab is typically located under the More tab on the navigation bar at the top of any Sugar screen to the right of the home cube icon. Depending on your settings, you may have to click "Show More" in order to see the Forecasts module tab. Click the tab to access the Forecasts module. A user with administrator access must first configure the Forecasts module before it can be accessed and used. For more information on setting up the Forecasts module, please refer to the [Forecast Configuration](#) documentation in the Administration guide.

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

- The top navigation bar may be filtered based on a specific tab grouping (i.e. Activities, Reports, etc.) of which the Forecasts module is not a member. Click the More tab (last tab on navigation bar) then hover on "Filter Menu By" to check how the navigation bar is grouped. For more information on tab grouping, please refer to the [User Interface](#) documentation.
- The Forecasts module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Forecasts module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the [Layout Options](#) section of the Getting Started documentation.
- The administrator may have disabled the Forecasts module for your entire Sugar instance. Reach out to your Sugar administrator to have the Forecasts module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the [Developer Tools](#) documentation in the Administration guide.

Forecast Actions

Forecast actions are available at the top of the Forecasts module page and allow users to perform the following operations:

Menu Item	Description
[Save Draft](#)	Saves changes to the user's opportunities worksheet but does not make these changes available to the user's manager
[Commit](#)	Saves changes to the current worksheet and pushes these changes to the user's manager's team worksheet or, in the

	case of a manager committing a personal opportunities worksheet, to his or her own team worksheet
Export CSV	Exports the rows of the current forecasts worksheet
Settings	For users with administrator access, opens the Forecast Configurations wizard
Print	Prints everything currently displayed on your Forecasts page including the worksheet and, if displayed, elements of the Intelligence Pane

Sales Representatives

Sales representatives use the Forecasts module to work with their assigned opportunities as the current time period progresses. These users will commit total predictions for their personal sales based on the opportunities they expect to close.

When you access the Forecasts module as a sales representative, you will see your name at the top left of the screen. Sales representatives who do not have any reportees will only be able to see and work with his or her own opportunities. Below your name, you will see a time period selection, summary and commit history, filter, and opportunities worksheet. On the right side of each page is an expandable Intelligence Pane which offers additional insight into your forecasting worksheet.

Time Periods

Below your name, you will see the current time period for which you are forecasting opportunities to meet a quota. The length and start date of this time period depends on the Time Periods configuration set up by your administrator. Clicking the arrow to the right of the current time period allows you to choose a future or past time period, the availability of which is also determined by the administrator's Time Periods configuration. Select a past or future time period to work with opportunities and forecast for those periods.

Summary & Commit History

To the right below the Time Period selection, you will see a summary of your current forecasting numbers for the time period currently in view. The large numbers are your current opportunities worksheet's Likely, Best, and Worst Case predictions. The smaller numbers show your most recent commit's Likely, Best, and Worst Case predictions. Any red or green arrows next to the large numbers show whether you worksheet's current (uncommitted) numbers are higher or lower than your most recent commit. Please note that you may or may not see a Best Case and Worst Case depending on your administrator's Scenarios configuration.

To the left of these summary numbers, you will see the date and time of your most recent commit. There will be no date and time shown if you have not yet committed for this time period. By clicking the arrow to the right of the latest commit date, a dark grey panel will appear showing a history of your commits for this time period along with the changes for each forecasting number from the previous commit.

Filters

Below the summary and commit history, you will see a filter bar which controls what kinds of opportunities are displayed. By default, the "Include" filter will be

active, meaning that only the opportunities with a probability falling within the Include range specified during the administrator's [Ranges](#) configuration will be displayed. To add additional filters, click the arrow to the right of the Filters bar and choose additional ranges. Please note the Upside range may or may not be available depending on the administrator's [Ranges](#) configuration. When the Upside range is not available, the Forecast column will display checkbox icons rather than words with the checked box representing "Include" and the unchecked box representing "Exclude". To remove ranges from the filter, click the "x" for each filter name. Removing all filters will display all of your assigned opportunities.

Opportunities & Totals

Based on the chosen filters, you will see all or some of your assigned opportunities for the currently selected time period listed below the Filters bar. The Forecast column displays an automatic category indicating whether or not the opportunity's amounts are included in the totals for this time period; this designation can be [changed manually](#). You can work directly with your opportunity records by in-line from the Forecasts module or by clicking the Name field to open a record in the Opportunities module where you can make additional edits.

Forecast	Name	Expected Close	Stage	Probability	Likely Case	Best Case	Worst Case
Exclude	Hansell - 200 Widgets	03/01/2013	Closed Lost	0	$10,000.00	$10,000.00	$10,000.00
Include	Brackstone - 400 Widgets	03/19/2013	Closed Won	100	$19,000.00	$19,000.00	$19,000.00
Exclude	Beretti - 375 Widgets	03/08/2013	Id. Decision Makers	40	$18,750.00	$18,750.00	$15,500.00
Include	Sonara - 550 Widgets	03/19/2013	Value Proposition	30	$27,500.00	$30,500.00	$18,500.00
				Included Total	$46,500.00	$49,500.00	$37,500.00
				Overall Total	$75,250.00	$78,250.00	$63,000.00

At the bottom of the opportunities list, "Included Total" provides the total amounts for all of your opportunities within this time period marked as "Include" in the

Forecast column. The "Overall Total" shows the total amounts regardless of each opportunity's designation in the Forecast column.

Note: If an administrator configures the Opportunities module's dropdown options for the Sales Stage field to remove "Closed Won" and "Closed Lost", the Forecasting module will sum all opportunities when calculating totals.

Editing Forecast Inclusion

The first time an opportunity is loaded to a opportunities worksheet, Sugar will assign it a category of either "Include", "Exclude", or "Upside" (optional) based on the [Ranges](#) configured by your administrator. Opportunities with a higher probability of being won are typically assigned to the Include range while those with a lower probability of being won are designated for the Exclude range. If your administrator has chosen to use the Upside range, this will usually consist of opportunities with a middle-level probability. If the administrator has chosen to not use the Upside range, the Forecast column will display checkbox icons rather than words with the checked box representing "Include" and the unchecked box representing "Exclude".

You may wish to alter the category automatically assigned to your opportunities by these adminstrator-configured ranges especially as each opportunity moves forward in the sales process and becomes more likely to be won. To do this, simply click on the opportunity's current category or checkbox in the Forecast column and choose the desired category from the dropdown menu or click the checkbox to be checked or unchecked.

Changing a opportunity's Forecast column to "Include" will cause its Likely, Best, and Worst Case fields to be added to your totals while choosing "Exclude" will remove the opportunity's numbers from your totals. Changing which opportunities are included on your worksheet requires you to [save a draft](#) or [commit](#) in order to preserved.

Note: Opportunities in a Closed Won stage will be included in the opportunities worksheet and cannot have their Forecast column altered. Opportunities in a Closed Lost stage will be excluded from the opportunities worksheet and cannot have their Forecast column altered.

Editing Opportunity Fields

In addition to editing the inclusion, you can make in-line changes to each opportunity's fields including Probability, Likely Case, Best Case, and Worst Case. To do so, simply click any field which shows a pencil icon when being hovered over, and enter the new amount. Keep in mind that your worksheet may or may not include "Best Case" and "Worst Case" amounts depending on your administrator's

Clicking outside the text box or pressing Enter/Return will save your change to the line and update the worksheet's totals, summary, and Intelligence Pane. Clicking the Save Draft or Commit button will also update the opportunity records themselves and make your changes visible when viewing the opportunity in other places in Sugar. Saving a draft or committing is also required to preserve these changes to your opportunities worksheet and, in the case of committing, make the changes visible in your manager's Forecasting module.

Note: You will not be able to edit any fields for opportunities in a Closed Lost or Closed Won stage from your worksheet, but they may be edited from the Opportunities module.

Currency Support

If you use a currency different from your Sugar instance's default currency, your opportunity Likely, Best, and Worst Case amounts will be displayed in the system's default currency in the Forecasting module. Clicking to edit these amount values will, however, display and allow for editing in your chosen currency.

Intelligence Pane

To the right of the opportunities worksheet you will find an expandable Intelligence Pane which provides additional insights for planning and forecasting. If the pane is hidden, click the double-arrow button to expand it. Clicking the button again will hide it when you wish to see your worksheet at full width.

Projected Table

The Projected table appears in the top of the Intelligence Pane and gives a breakdown of how your opportunities match up to your quota as well as insight into your current pipeline. Keep in mind that your Projected table may or may not

include "Best Case" and "Worst Case" amounts depending on your administrator's

Projected		
Quota		**$45,000.00**
Likely above Quota	103%	$1,500.00
Best above Quota	110%	$4,500.00
Worst below Quota	83%	$7,500.00
Closed		**$19,000.00**
Likely above Closed	244%	$27,500.00
Best above Closed	260%	$30,500.00
Worst above Closed	197%	$18,500.00

Pipeline Opportunities	Pipeline Revenue	Pipeline Size
2	$46,250.00	x1

The projected table's values are calculated based on the most recent updates to your opportunities worksheet even if the changes have not yet been saved as a draft or committed. The values take all of your opportunities into account regardless of any filters currently being used in your worksheet. Their meanings are as follows:

Field	Description
Quota	Your personal quota for this sales time period as assigned by your manager
Likely above/below Quota	The difference between your included opportunities' Likely Case amounts and your quota as well as the corresponding percentage
Best above/below Quota	(Optional) The difference between your included opportunities' Best Case amounts and your quota as well as the corresponding percentage
Worst above/below Quota	(Optional) The difference between your included opportunities' Worst Case amounts and your quota as well as the corresponding percentage
Closed	The total amount of your Closed Won opportunities
Likely above Closed	The difference between your included

	opportunities' Likely Case amounts and your Closed Won total as well as the corresponding percentage
Best above Closed	(Optional) The difference between your included opportunities' Best Case amounts and your Closed Won total as well as the corresponding percentage
Worst above Closed	(Optional) The difference between your included opportunities' Worst Case amounts and your Closed Won total as well as the corresponding percentage
Pipeline Opportunities	The number of your in-progress included and excluded opportunities which are not yet in a Closed Won or Closed Lost stage
Pipeline Revenue	The total Likely Case amounts of your in-progress included and excluded opportunities which are not yet in a Closed Won or Closed Lost stage
Pipeline Size	The ratio of your in-process opportunities' total to your "Included" opportunities' total; a progressive gauge of how much more business is available for you to bring in for this time period: a higher number indicates many more opportunities are available to be pursued and included on your forecast while a lower number indicates you are nearing the end of your available opportunities

Chart

The bottom of the Intelligence Pane provides a configurable chart showing different cuts of your forecasting data over the course of the selected time period. Each opportunity's Expected Close Date field determines in which sub-period it appears. Only the opportunities currently appearing on your worksheet will appear in your chart meaning that the chart is also respecting your current filters. Throughout all chart configurations, the dotted black line represents your quota for the given time period and can be hovered over to view the quota amount.

Click the gear icon to configure what is displayed in the chart.

When "Likely" is chosen, each purple point represents the total Likely Case amounts for all opportunities regardless of stage or inclusion in the forecast for that month and any previous months falling within the time period. Choosing "Best" or "Worst" shows the same points using the opportunities' Best Case or Worst Case amounts instead. A purple line connects these points showing the change in your possible cumulative opportunity amounts. Please note that you may or may not see "Best" and "Worst" as options depending on your administrator's Scenarios configuration.

Choosing "Included in Forecast" in the chart configuration will show bars representing the Likely Case amounts for your opportunities with expected close dates in each sub-period color coded by whether the opportunities are included in or excluded from your opportunities worksheet.

Choosing "Sales Stage" in the chart configuration will show bars representing the Likely Case amounts for your opportunities with expected close dates in each sub-period color coded by the opportunities' sales stage.

Choosing "Probability" in the chart configuration will show bars representing the Likely Case amounts for your opportunities with expected close dates in each sub-period color coded by the opportunities' probabilities.

Note: Changes to your opportunities worksheet will need to be saved as a draft or committed before they will be reflected in the chart, however current filters in your worksheet will control what opportunities are included in the chart.

Sales Managers

Sales managers work with their own opportunity records similarly to other sales

representatives. In addition, they aggregate their reportee's committed forecast amounts to predict their total team's sales and work towards the team's quota for the each time period.

When you access the Forecasts module as a sales manager, you will see your name at the top left of the page along with an arrow which allows you to drill down into your personal opportunities worksheet, your team worksheet, and your reportee's opportunities worksheets hierarchically. While working with your personal opportunities worksheet works similarly to how a regular sales representatives works with their opportunities, you will also have options such as time period selection, summary and commit history, and filters when working with your team worksheet and your reportees' forecasting data. On the right side of each page is an expandable intelligence pane which offers additional insight into your forecasting worksheet.

Forecast Drilldown

Because sales managers are able to see and work with their reportee's opportunities in addition to their own, these users will see an arrow next to their name at the top left of the Forecasts module. This allows them to drill into team forecasting data and individual sales representatives' opportunities. By default, Aaron will enter the Forecasts module viewing his team worksheet which includes the total committed amounts and quotas for each immediate reportee and himself.

Own Opportunities

As a manager, Aaron can see and work with his own opportunities by selecting "Opportunities (Aaron Johnson)" from the menu next to his name or from the Name column in his team worksheet below.

While working with his own opportunities, he will have the same options on his opportunities worksheet as a regular sales representative has. For more information on working with a manager's opportunities worksheet, please refer to the Opportunities & Totals section of this documentation. Aaron will need to

commit his new opportunities or changes to his opportunities on his opportunities worksheet before the amounts will be reflected on his team worksheet.

Reportee's Opportunities

Since Aaron is Ellen's manager, Aaron also has the ability to work with Ellen's committed forecast and opportunities. He can navigate to her committed opportunities worksheet by selecting "Ellen Smith" from the menu next to his name or from the Name column in his team worksheet below.

While viewing his reportee's opportunities worksheet, Aaron will not be able to edit any of the opportunities' amounts or probabilities. He is able to filter for various ranges, change the time period, and view Ellen's summary and commit history for each time period.

Team Worksheet

Aaron can return to his team worksheet by choosing his own name from the Drilldown menu.

While viewing his team worksheet, he has the ability to set each team member's quota as well as to set adjusted Likely, Best, and Worst Case amounts. Please note that your worksheets may or may not include "Best Case" and "Worst Case" amounts depending on your administrator's Scenarios configuration.To edit an adjusted amount or quota, click on the number, enter a new value, and click outside the text box or press Return/Enter. Clicking "Save Draft" will preserve these changes in the worksheet but will not push the changes to other Sugar users. Upon clicking "Commit", these adjusted amounts will be pushed to Aaron's

manager thus appearing in Joy's worksheet as his committed amounts. Any changes to quotas will also be pushed to his reportee's worksheets.

Likely Case ⇕	Likely (Adjusted) ⇕	Best Case ⇕	Best (Adjusted) ⇕	Worst Case ⇕	Worst (Adjusted) ⇕	⇕
$40,000.00	$ 0.00	$40,000.00	$0.00	$30,000.00	$0.00	ⓘ
$46,500.00	$46,500.00	$49,500.00	$49,500.00	$37,500.00	$37,500.00	ⓘ
$86,500.00	$46,500.00	$89,500.00	$49,500.00	$67,500.00	$37,500.00	

From the team worksheet, managers will see an "i" icon on the far right of each row where there are newly committed changes. Clicking the "i" opens the most recent commit history for that team member.

Note: Although it is possible for Aaron to set or alter his own personal quota, it is recommended that intermediate managers not make changes to their personal quota. Rather, Aaron's manager, Joy, should set the quota for his entire team from her team worksheet.

Management Hierarchy

The ability to drill into a reportee's team worksheet and opportunities continues up the management chain. Joy is Aaron's manager and views her own team worksheet by default when first opening the Forecasts module. She is also able to drill into her own opportunities by clicking "Opportunities (Joy Miller)", Aaron's team worksheet by clicking his name, or her other reportee's team worksheet.

Joy Miller ▾

📁 Joy Miller
  👤 Opportunities (Joy Miller)
  📁 Aaron Johnson
  📁 Hannah Matthews

Time Period
Q1 (01/01/2013 - 0

When Joy navigates to her reportee Aaron's team worksheet, Aaron's name now appears and his team worksheet is displayed in read-only mode. Joy can further drill down to see the opportunities worksheets of Aaron's team's members in read-only mode. This drilling can continue recursively down through the management chain as needed. Clicking "Parent" will move up one level of hierarchy, bringing Joy back to her own team worksheet.

Aaron Johnson ▾

↑ Parent
📁 Aaron Johnson
  👤 Aaron Johnson
  👤 Ellen Smith

Time Period
Q1 (01/01/2013 - 03/31/201
Latest Commit: 03/05/2013

Time Periods

Below the currently selected drilldown name, you will see the time period for which you are forecasting to meet the time period's quota for your team. The length and start date of this time period depends on the Time Periods configuration set up by your administrator. At every level of drilldown, sales managers can click the arrow to the right of the current time period and choose a future or past time period, the availability of which is also determined by the administrator's Time Periods configuration. Select a past or future time period to work with opportunities and forecast for those periods.

Summary & Commit History

To the right below the Time Period selection, you will see a summary of the current forecasting numbers for the time period and drilldown level currently in view. The large numbers are the forecasting worksheet's Likely, Best, and Worst Case predictions. The smaller numbers show the most recent commit's Likely, Best, and Worst Case predictions. Any red or green arrows next to the large numbers on a manager's personal opportunities worksheet or own team worksheet show whether your worksheet's current (uncommitted) numbers are higher or lower than the most recent commit. Please note that you may or may not see a Best Case and Worst Case depending on your administrator's Scenarios configuration.

To the left of these summary numbers, you will see the date and time of the most recent commit. On a manager's personal worksheet and own team's worksheet, there will be no date and time shown if you have not yet committed for this time period. By clicking the arrow to the right of the latest commit date, a dark grey panel will appear showing a history of the commits for the worksheet currently in view for this time period along with the changes for each forecasting number from the previous commit.

Filters

Below the summary and commit history of each opportunities worksheet, managers will see a filter bar which controls what kinds of opportunities are displayed. By default, the "Include" filter will be active, meaning that only the opportunities with a probability falling within the Include range specified during the administrator's [Ranges](#) configuration will be displayed. To add additional filters, click the arrow to the right of the Filters bar and choose additional ranges. Please note the Upside range may or may not be available depending on the administrator's [Ranges](#) configuration. When the Upside range is not available, the Forecast column will display checkbox icons rather than words with the checked box representing "Include" and the unchecked box representing "Exclude". To remove ranges from the filter, click the "x" for each filter name. Removing all filters will display all of your assigned opportunities. Please note that when viewing your reportee's opportunity worksheets, only the opportunities they have committed as included will be visible.

Intelligence Pane

To the right of the forecasting worksheet you will find an expandable Intelligence Pane which provides additional insights for planning and forecasting. If the pane is hidden, click the double-arrow button to expand it. Clicking the button again will hide it when you wish to see your worksheets at full width.

Projected Table

The Projected table appears in the top of the Intelligence Pane and gives a

breakdown of how the current drilldown's worksheet totals match up to that worksheet's quota as well as insight into the pipeline relevant to that worksheet. Keep in mind that your Projected table may or may not include "Best Case" and "Worst Case" amounts depending on your administrator's Scenariosconfiguration.

Projected		
Quota		**$45,000.00**
Likely above Quota	103%	$1,500.00
Best above Quota	110%	$4,500.00
Worst below Quota	83%	$7,500.00
Closed		**$19,000.00**
Likely above Closed	244%	$27,500.00
Best above Closed	260%	$30,500.00
Worst above Closed	197%	$18,500.00

Pipeline Opportunities	Pipeline Revenue	Pipeline Size
2	$46,250.00	x1

When viewing your own team worksheet and own opportunities worksheet, the Projected table's values are calculated based on the most recent updates even if the changes have not yet been saved as a draft or committed. The exception to this is changes to your or your reportee's quotas - these changes must be committed prior to appearing in the Projected table. The values take all of your opportunities into account regardless of any filters currently being used in your worksheet. Their meanings are as follows:

Field	Description
Quota	The worksheet's quota for this sales time period
Likely above/below Quota	The difference between the worksheet's included opportunities' Likely Case amounts and the worksheet's quota as well as the corresponding percentage
Best above/below Quota	(Optional) The difference between the worksheet's included opportunities' Best Case amounts and the worksheet's quota as well as the corresponding percentage
Worst above/below Quota	(Optional) The difference between the worksheet's included opportunities'

	Worst Case amounts and the worksheet's quota as well as the corresponding percentage
Closed	The total amount of the worksheet's Closed Won opportunities
Likely above Closed	The difference between the worksheet's included opportunities' Likely Case amounts and the worksheet's Closed Won total as well as the corresponding percentage
Best above Closed	(Optional) The difference between the worksheet's included opportunities' Best Case amounts and the worksheet's Closed Won total as well as the corresponding percentage
Worst above Closed	(Optional) The difference between the worksheet's included opportunities' Worst Case amounts and the worksheet's Closed Won total as well as the corresponding percentage
Pipeline Opportunities	The number of the worksheet's in-progress included and excluded opportunities which are not yet in a Closed Won or Closed Lost stage
Pipeline Revenue	The total Likely Case amounts of the worksheet's in-progress included and excluded opportunities which are not yet in a Closed Won or Closed Lost stage
Pipeline Size	The ratio of the worksheet's in-process opportunities' total to the "Included" opportunities' total; a progressive gauge of how much more business is available to be brought in for this time period: a higher number indicates many more opportunities are available to be pursued and included on the forecast while a lower number indicates nearing the end of the available opportunities

Chart

The bottom of the Intelligence Pane provides a configurable chart showing different cuts of your team members' forecasting data. Throughout all chart configurations, the dotted black line represents your quota for the given time period and can be hovered over to view the quota amount.

While viewing your or a reportee's opportunities worksheet, the charts will display the relevant opportunities over the course of the selected time period. In these views, the charts function in the same way as they do for support representatives without reportees. For more information on the meanings and configuration of the chart while viewing your or a reportee's opportunities worksheet, please refer to the [Chart](#)section within the Sales Representative section of this documentation.

While viewing your or a reportee's team worksheet, the charts will display the current worksheet's totals in bars grouped according to user. Throughout all chart configurations, the dotted black line represents the worksheet's quota for the given time period and can be hovered over to view the quota amount.

Click the gear icon to configure what is displayed in the chart.

When "Likely" is chosen, each green bar represents the total committed Likely Case amount for each user within the current team worksheet. Each red bar represents the total adjusted Likely Case amount for each user. The users are ordered from left to right by their adjusted Likely Case amounts in decreasing order. The green dots show the cumulative Likely Case total of the team built user-by-user from left to right with the rightmost point representing the total Likely Case amount for the entire team. The red dots do the same using the adjusted Likely Case team total.

Choosing "Best" shows similar chart elements except that the Best Case and adjusted Best Case amounts are used. Choosing "Worst" does the same with Worst Case and adjusted Worst Case amounts. Please note that you may or may not see "Best" and "Worst" as options depending on your administrator's [Scenarios](#) configuration.

Note: Changes to the forecasting worksheet will need to be saved as a draft or committed before they will be reflected in the chart.

Saving Forecast Drafts

Whenever new information is added or changes are made to your current forecasting worksheet, the Save Draft button will become activated. Click this button to save your changes to the current worksheet without submitting these changes to your manager. This provides an opportunity to work with your forecast data before pushing more finalized amounts up the management chain. Clicking "Save Draft" will also cause any changes to your personal opportunities' amounts and/or probability to alter the opportunity record itself, making these new numbers visible on the opportunity in other areas of Sugar.

Committing Forecasts

Whenever new information is added or changes are made to your current forecasting worksheet, the Commit button will become activated. Click this button

to save your changes to the current worksheet and to submit these changes to your manager or to the team worksheet if you are a manager working on your personal opportunities worksheet. Clicking "Commit" will also cause any changes to your personal opportunities' amounts and/or probability to alter the opportunity record itself, making these new numbers visible on the opportunity in other areas of Sugar.

For sales managers, changes to your reportees' quotas will not appear in their Forecasts module you perform a commit. Changes to your and your reportee's quotas will also not be reflected in the Projected table of the Intelligence Pane until you perform a commit.

Exporting Forecasts

The Export option is available on every forecasting page and exports every line of the current worksheet. Sugar will export all opportunities belonging to an opportunities worksheet without regard to any filters currently being used to hide opportunities. The resulting CSV file can be used in other programs such as Microsoft Excel to view and manipulate your forecasting data. To export your current worksheet, click "Export CSV" in the Actions menu.

Configuring Forecasts

Users with administrator access will have a Settings option available within the Forecasts module. Choosing "Settings" will open the Forecast Configuration wizard which is also available by navigating to Admin > Forecasts. For more information on configuring the Forecasts module, please refer to the [Forecast Configuration](#) documentation in the Administration Guide.

Printing Forecasts

The Print option is available on every forecasting worksheet and prints everything currently displayed on the page. If any filters are being used in the worksheet, only

the displayed rows will be printed. Likewise, the Projected table and Chart will only be printed if the Intelligence Pane is currently visible. To print your current page, select "Print" from the dropdown Actions menu.

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Quotes

Overview

Sugar's Quotes module consists of quotes which specify the quantity and the price per unit for products or services that your organization is selling to clients. You can select a product directly from the product catalog or manually enter a product that is not in the catalog during quote creation. There are various ways you can create quotes in Sugar such as via the Quotes module and duplication. Once created, you can generate the quote in PDF format (i.e. Quote or Invoice) and send it to your clients. This documentation will go over the basics of the Quotes module as well as the various options available in performing the actions related to the module.

Quote Fields

The Quotes module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the [Studio](#) documentation in the Administration guide.

Field	Description
Actual Close	The date the quote order shipped
Actual Close Date	The date the quote is closed
Assigned To	The Sugar user assigned to the quote
Billing Account Name	The account to which the quote is billed
Billing Address	The billing address of the account

	paying for the product or service
Billing Contact Name	The contact associated with the Account to whom the quote is billed
Copy Address From Left	Select the box to copy the account's billing address to the shipping address field
Converted Amount	The amount of the quote converted to and displayed in the system's default currency or the user's preferred currency when the Show Preferred Currency option is enabled on the viewing user's profile Note: This field is only available in the list view. For more information on the Converted Amount field, please see [Transaction Amount Field Vs. Converted Amount Field](#)
Date Created	The date the quote record was created
Date Modified	The date the quote record was last modified
Description	A description or other information about the quote
Discount	The discounted amount (if applicable) for the quote
Discount Total	The total discount for the quote
Discounted Subtotal	The discounted subtotal for the quote
Display Grand Total	Indicate if the grand total should be displayed
Display Line Numbers	Indicate if the line numbers should be displayed
Opportunity Name	The opportunity name associated with the quote
Order Stage	The current order stage (e.g. Pending, Confirmed, etc.) of the quote
Original P.O. Date	The date of the original purchase order
Payment Terms	The time period within which the client must pay for the product or service
Purchase Order Num	The purchase order number of the quote
Quote Number	The system-generated quote number

Quote Stage	The current stage of the quote's life cycle (e.g. Draft, Confirmed, etc.)
Quote Subject	Information or detail about the product or service for which you are creating the quote
Quote Type	The quote type
Shipping	The shipping amount for the quote
Shipping Account Name	The account to which the products will be delivered
Shipping Address	Address to which the products will be delivered
Shipping Contact Name	Contact associated with the Account to whom the products will be delivered
Subtotal	The subtotal for the quote
Teams	The Sugar team(s) assigned to the quote record
Tax	The tax rate for the quote
Total	The total amount of the quote
Transaction Amount	The transactional amount of the quote which may use any currency configured within Sugar Note: For more information on the Transaction Amount field, please see [Transaction Amount Field Vs. Converted Amount Field](#)
Valid Until	The date until which this quote is valid

Quote Stages

The quote stage defines the current stage (e.g. Draft, Confirmed, etc.) of your quote's life cycle. There are eight quote stages which come out-of-the-box with Sugar and users with administrator or developer access have the ability to modify the quote stages via Admin < Dropdown Editor. For more information on modifying the quote stage, please refer to the [Developer Tools](#) documentation in the Administration guide. The below definitions are suggested meanings for each quote stage, but the stage's can be leveraged differently to best meet your organization's needs.

Quote Stage	Description

Draft	The draft version of the quote is currently being created for the client
Negotiation	Communicated with the client and modifying the details of the quote
Delivered	The updated quote is delivered to the client
On Hold	Awaiting input on quote
Confirmed	The quote is approved for sale
Closed Accepted	Client accepts the terms of the quote and agrees to proceed with the sale
Closed Lost	Client does not agree to the terms of the quote and the sale is lost
Closed Dead	Possible lack of communication from the client and the sale is lost

Quotes Module Tab

The Quotes module tab is typically located under the More tab of the navigation bar at the top of any Sugar screen. Sugar normally displays the top six modules shown in the Display Modules list of your user preferences, so the remaining displayed modules are grouped under the More tab. For more information on displayed modules for the navigation bar, please refer to the [Layout Options](#) section of the Getting Started documentation. Click the tab to access the Quotes list view. You may also hover on the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The [Recently Viewed menu](#) displays the list of quotes you last viewed in the module. The [Favorites Menu](#) displays the list of quotes you most recently marked as favorites in the module.

The Actions menu allows you to perform the following operations:

Menu Item	Description
[Create Quote](#)	Opens the edit view layout to create a new quote

View Quotes	Opens the list view layout to search and display quotes
View Quote Reports	Displays existing reports based on the Quotes module

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

- The top navigation bar may be filtered based on a specific tab grouping (e.g. Activities, Reports, etc.) of which the Quotes module is not a member. Click the More tab (last tab on navigation bar) then hover on "Filter Menu By" to check how the navigation bar is grouped. For more information on tab grouping, please refer to the User Interface documentation.
- The Quotes module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Quotes module in the Hide Modules list, simply move it to the Display Modules list and save. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Quotes module for your entire Sugar instance. Reach out to your Sugar administrator to have the Quotes module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

Creating Quotes

There are various methods for creating quotes in Sugar including via the Quotes module and duplication. The full edit view layout opens when creating the quote directly from the Quotes menu and includes all of the relevant fields for your organization's quotes. The Edit View layout can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

Creating Via Quotes Module

One of the most common methods of quote creation is via the Create Quote option in the Quotes module tab. This opens up the edit view layout which allows you to enter in all the relevant information (e.g. Basic Information, Line Items, etc.) for the quote. Once the product details are entered in the quote's line item(s), Sugar will automatically calculate and display the subtotal, discount (if applicable), tax, shipping, and total for each group as well as a grand total for the entire quote.

Basic Information

The first part of creating a quote is to complete the basic information sections (e.g. Overview, Bill to, Address Information). Enter the appropriate values for the [fields](#)

Adding Groups

The Line Items section allows users to add products from the product catalog and arrange them in groups. Prior to adding the groups and products, you can define the currency, tax rate, shipping provider, etc. if different from the default value selected. Please note that users with administrator or developer access have the ability to configure the Currency, Tax Rate, and Shipping Provider fields via Admin > Currency, Admin > Tax Rates, and Admin > Shipping Providers. For more information on configuring these fields, please refer to the [System](#) as well as the [Products and Quotes](#) documentations. The Display Grand Total and Display Line Number checkbox is marked by default, but you can uncheck it if you do not wish to have the grand total or line numbers displayed on the quote.

You can add multiple groups (e.g. chairs, tables, etc.) to your quote to arrange similar products and/or services together for better organization. For example, you can add a group called "Chairs" then add the different types of chairs that the client is purchasing under this group.

Use the following steps to add a new group to your quote:

1. Scroll to the Line Items panel and click the Add Group button.

2. Enter in a group name then click the [Add Row](#) button to add products to this group.
   - By default, "Draft" is selected as the group stage, but you can change this accordingly.

3. To delete a group, click the Delete Group button.

Adding Rows

Once you create a group, use the Add Row feature to add products to the group. You have the option of selecting a product from the product catalog or manually entering a new product, not in the catalog. When you select the product from the catalog, the system automatically populates the manufacturer's number, tax class, cost, list, etc. You cannot modify the line item information for selected products as the value is pulled directly from the product catalog. Please note that system administrators must first create and add products via Admin > Product Catalog in

order for users to select it when adding line items. For more information on adding and modifying products in the product catalog, please refer to the [Product Catalog](#) section of the Product and Quotes documentation.New products entered in the quote can have the manufacturer number, tax class, and pricing information manually entered. Please note that products you manually enter into the quote will not be added to the product catalog as only administrators have the ability to create them.

The product(s) added to each quote line item will create a new record in the Products module when the quote is saved. For more information on creating product records, please refer to the [Products](#) documentation.

Use the following steps to add a row and select a product from the Product Catalog:

1. Click "Add Row" in the Group section.

2. Click the arrow next to the Product field to select from the Product Catalog list.

3. Locate and select the desired product in the pop-up window to add to your group.
   - You can also use the Search panel to search for a product by name and category.

The selected product will be added to the group with the populated line items (grayed out). You can modify the quantity and unit price as well as enter in a discount (if applicable) if you wish. Please note that you can input the discount in absolute price or mark the checkbox if you would like to indicate the discount as a percentage of the unit price. For a description of the line item fields (e.g. Cost, List, etc.), please refer to the Product Catalog Fields section in the Products and Quotes documentation. Please note that any products that should not be included in the quote can be easily removed by clicking "Remove Row" to the far right of

each product row.

Use the following steps to add a row and manually enter a product in the group:

1. Click "Add Row" in the Group section.
2. Manually enter in the product name along with the manufacturer number, tax class, cost, etc. to add to your group.
   - For a description of the line item fields (e.g. Cost, List, etc.), please refer to the Product Catalog Fieldssection in the Products and Quotes documentation.

Note: Products that are manually entered into quotes will not be added to your product catalog, but will be added as new product records in the Products module.

Adding Comments

Users have the option to enter comments for individual products as well as add comments as a line item in the group. Please note that all comments entered will appear on both the Quote and Invoice PDF documents.

Use the open text box below each product to enter any product-related information.

To add a comment for the group, click the Add Comment button and the comment box will be added as a line item. You can remove any group comments that are not needed by clicking "Remove Comment" to the right of the comment box.

Rearranging Line Items

Users also have the ability to rearrange quote line items (e.g. rows and comments) by placing them in different positions within the group per their personal preference.

The following steps cover moving the Recliner line item to the Ottoman line item location as an example:

1. Click the double vertical bar icon to the left of the Recliner line item row.

2. Now, click the double vertical bar icon to the left of the Ottoman line item row.

Once you click the second double vertical bar icon, the Recliner line item will swap positions with the Ottoman line item and display in the second row. Please note that you can also rearrange any comment line item rows by following the same steps above.

Creating Via Duplication

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

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

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

Mirrors for Waverly Trading House ⭐

Edit ▼
Duplicate
Delete
Create Opportunity from Quote · Waverly Trading House

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

Create

Save   Cancel

⌃ Overview

Quote Subject: *   Mirrors for Waverly Trading H
Quote Number:
Purchase Order Num: 3940021

Viewing Quotes

There are various options available for viewing quote records in Sugar including via Quotes list view, Quotes detail view, Quotes Recently Viewed menu, dashlets, and reports. Please note that you will only be able to see quote records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide.

Viewing Via List View

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

Viewing Via Detail View

The Quotes detail view displays thorough quote information including all quote

fields followed by subpanels of the quote's related records belonging to various modules. The detail view can be reached by clicking a quote record's link from anywhere in the application including from the Quotes list view. For more information on viewing quotes via detail view, please refer to the Quotes Detail View section of this documentation.

Viewing Via Recently Viewed

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

Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets which allow users to get a quick view of various records, activities, reports, etc. You can view quote information in quote-based dashlets such as "My Quotes" as well as in dashlets based on other modules such as "My Calls". Clicking a quote's name from any dashlet will open the quote in detail view. For more information on using dashlets and viewing quote records via dashlets, please refer to the Modules section of the Home documentation.

Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding quotes and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you

will be able to view the quote record's detail view by clicking the quote's name in the report results. Please note that you can only directly access quote detail views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the [Reports](#) documentation.

Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide.Check with your system administrator if you cannot access the Reports module.

Searching Quotes

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

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

Basic Search

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

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

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Items : Select this box to return only records assigned to you.
- My Favorites : Select this box to return only records you have marked as favorites.
- Open Items : Select this box to return only records with an open stage (e.g. Draft, Negotiation, etc.).

Search Quotes

| Quote Subject | | My Items ☐ My Favorites ☐ Open Items ☐ | Search | Clear | **Advanced Search** |

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

Administrators can configure what fields appear on the Quotes Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Advanced Search

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

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

- Search : Click the Search button or press your Return/Enter key to perform the search.

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

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

Administrators can configure what fields appear on the Quotes Advanced Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with

version 6.5.0, Full Text Search may be used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.

To use global search, you need to first enter the keyword into the search box. With Full Text Search enabled, pop-up results will begin appearing once you input three or more characters. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. When Full Text Search is not enabled, results starting with your keyword will appear after clicking the magnifying glass icon or hitting your Return/Enter key. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

Quotes List View

The Quotes list view displays all quote records meeting the current search criteria to which your user has access. You can view the basic details of each quote within the field columns. Please note that you will only be able to see quote records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

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

Pagination

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

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

Checkbox Selection

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

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

Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform

various actions on the currently selected records.

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

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

Favorite Designation

Users have the option to mark quote records as favorites via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Quotes module tab. In the Quotes list view, the star on the left of each quote's row is yellow once marked to indicate a favorite quote. For more information on how to mark records as favorites, please refer to the Favoriting Quotes section of this documentation.

More Information

Additional details for each quote can be viewed by clicking the "i" icon to the far right of each list view row. This provides users a quick view of additional quote information in addition to what appears in the display column fields. The resulting pop-up window will show the Purchase Order Number, Original P.O. Date, Billing Address, Shipping Address, Subtotal, Tax, Shipping, Total, and Description fields by default. The list of fields appearing here may only be configured through a code-level customization.

Column Sorting

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

Transaction Amount Field Vs. Converted Amount Field

The stock Quotes list view contains two fields, Transaction Amount and Converted Amount, that differ in functionality. When the viewing user's Show Preferred Currency option is selected in their user profile, the Converted Amount field will be displayed in the user's preferred currency. When it is unchecked, the Converted Amount field will be displayed in the system default currency. For information about setting a user's Preferred Currency and Show Preferred Currency options, please refer to the [User Profile](#) documentation.

The primary differences between these fields and options are as follows:

Field Name	Value Displayed	Sortable in List View	Method to Update Value
Transaction Amount	Transactional amount; the currency and value in which the quote was last saved	No; since this field may include values using different currencies, numerical sorting would not result in a valid ordering of the comparative amounts	Updated by editing the quote record
Converted Amount (system default	Transaction Amount converted	Yes; since all possible values use	Updated by a scheduled process

currency)	to the system default currency based on the system-defined conversion rate	a single currency, sorting is allowed	when the relevant exchange rate is modified via Admin > Currencies. For more information on how currency changes affect the Converted Amount value please see [Updating Currency Rates](#)
Converted Amount (user's preferred currency)	Transaction Amount converted to the viewing user's preferred currency as specified in their user profile based on the system-defined conversion rate	Yes; since all possible values use a single currency, sorting is allowed	Updated by modifying the relevant exchange rate via Admin > Currencies. For more information on how currency changes affect the Converted Amount value please see [Updating Currency Rates](#)

Quotes Detail View

The Quotes detail view displays thorough quote information including all quote fields which are grouped by default into the Overview, Bill to, Address Information, and Other panels. The Line Items panel displays as well to show the details of products being purchased arranged by groups. You can also view a quote's related records (Activities, History, Documents) which appear in [subpanels](#) beneath the quote fields. The detail view can be reached by clicking a quote record's link from anywhere in the application including from the Quotes list view.

Please note that you will only be able to view a quote record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Actions Menu

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

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

Menu Item	Description
Edit	Edit this quote
Duplicate	Duplicate this quote
Delete	Delete this quote
Create Opportunity from Quote	Use this quote information to create an opportunity record
Download PDF	Download this quote in PDF format
Email PDF	Email this quote as a PDF attachment
View Change Log	View a record of changes to this quote

Favorite Designation

Users have the option to mark quote records as a favorite via the detail view as well as the list view. This allows users to designate records that are important or will be viewed often as they can easily be accessed via search or from the Quotes module tab. In the Quotes detail view, the star on the right of the quote's name is yellow once marked to indicate a favorite quote. For more information on how to mark records as favorites, please refer to the Favoriting Quotes section of this documentation.

Next or Previous Record

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

Subpanels

Beneath a quote record's fields are subpanels containing related records from various modules.

Related Record Subpanels

The most common type of subpanel displayed on a quote's detail view contain the quote's related records belonging to the Documents module. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. For example, multiple quotes may be related to an opportunity, which means that the related opportunity will be displayed in a relate field in the quote's Overview panel.

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

Related record subpanels allow the following operations to be performed. Please note that administrators in Sugar can change the subpanel's Action menu to be displayed as separate buttons instead of a dropdown via Admin > System Settings. For more information, please refer to the System documentation in the Administration guide.

- To view the details of a related record, click the record's name in the

subpanel to open it in detail view.

- To relate an existing record to the quote, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the quote, choose "Create" from the subpanel's Action menu, then complete the Quick Create form and click "Save".
- To delete the quote's relationship to a record, choose "Unlink" from the dropdown on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

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

Activities and History Subpanel

The Activities subpanel lists open or upcoming tasks, calls, and meetings that are related to the quote record. Once the activities have taken place or are completed, they will instead appear within the History subpanel. The History subpanel also includes notes and emails associated with the quote record. For more information on the history and activities subpanel, please refer to the User Interface documentation.

Editing Quotes

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

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

Please note that your ability to edit quotes in Sugar may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator

if you do not see the Edit options.

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

Editing Via Detail View

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

Computers for Waverly Trading House ☆

| Edit ▾ |

⌃ Overview

Quote Subject: Computers for Waverly Trading House

Editing Via List View

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

Number ⇕	Subject ⇕	Account Name ⇕
✐ 1	**Computers for Waverly Trading House**	Waverly Trading House

Editing Via Dashlets

You can edit quotes by clicking the pencil icon to the far right of any quotes-based dashlet on your Sugar home page. For example, clicking the pencil icon within the My Quotes dashlet will open a pop-up window with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. For more information on dashlets, please refer to the [Home](#) documentation.

Editing Via Reports

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

Deleting Quotes

If a quote record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Quotes detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting quote records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

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

Deleting Via Detail View

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

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

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

Mass Deleting Via List View

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

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

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

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

Exporting Quotes

Sugar's Export option allows users to download all fields for the selected quotes to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Quote data with other software such as Microsoft Excel. Due to

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

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

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

Mass Updating Quotes

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

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

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

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

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

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

Favoriting Quotes

Each Sugar user has the option to designate their own favorite quotes which are important or will be viewed often so that they can easily be accessed via search or from the Quotes module tab. Once records are marked as favorites, use the My Favorites checkbox in the Quotes [Basic](#) or [Advanced Search](#) to retrieve your favorites or select from your most recent favorites directly from the [Quotes module tab](#) .

Favoriting Via List View

Use the following steps to mark records as favorites via the Quotes list view:

1. Navigate to the Quotes list view by clicking the Quotes module tab.
2. Use the [Basic](#) or [Advanced Search](#) to find the Quote records you wish to mark as favorites.
3. Mark the star icon on the left of each desired quote's row.
4. To remove the quote as a favorite, click the star again to revert it to white.

Favoriting Via Detail View

Use the following steps to mark records as favorites via the Quotes detail view:

1. Navigate to a quote record's detail view.
2. Click the star icon to the right of the quote's name in the upper left of the detail view to designate it as a favorite.
3. To remove the quote as a favorite, click the star again to revert it to white.

Creating Opportunities from Quotes

Each opportunity record in Sugar represents a prospective sale and includes relevant sales data as well as relating to other important records such as quotes, contacts, etc. As you interact with your client and present the quote for your products and services, you can create an opportunity from the Quotes detail view to better track your sales. The displayed Opportunity detail view is pre-populated with the original quote's values to reflect the opportunity name, opportunity amount, account name, expected close date, best case, and worst case. Any other fields populated will be based off the default values as they are defined in Studio for the Opportunities module. Please note that the opportunity record will automatically be associated to the quote .

Use the following steps to create an opportunity from a quote:

1. Navigate to a quote record's detail view.
2. Select "Create Opportunity from Quote" from the Actions menu.

3. The newly created Opportunity record will be pre-populated with some of the original quote's values and linked to the quote record.
   - You may update the record if you wish by clicking "Edit" then saving the changes.

Downloading Quotes as PDFs

Users have the option to download the quotes as PDF's via the Quotes detail view. The two formats available when downloading the quote to PDF is "Quote" and "Invoice". The Download PDF option enables you to easily download the quote onto your machine and email or mail it to your client outside of the Sugar application. Both PDF formats list the details (e.g. quantity, product name, etc.) of the items or services for purchase as well as the associated price (e.g. list price, unit price, tax, total, etc.). When the quote is initially created in the system, you can download it as a Quote PDF file and send it to the client for review. Once the client approves the quote's terms and agrees to purchase your product or service, you can generate an invoice for payment.

Use the following steps to download a quote as PDF:

1. Navigate to a quote record's detail view.
2. Hover on the Download PDF option in the Actions menu and choose either "Quote" or "Invoice".

Mirrors for Waverly Trading House ☆

Edit ▼
Duplicate
Delete
Create Opportunity from Quote   r Waverly Trading House
Download PDF   Quote
Email PDF   Invoice
View Change Log

3. Open the downloaded file and save it to your machine.
   Quote:

SUGARCRM

10050 N Wolfe Rd.
SW2-130
Cupertino, CA 95014

Quote	
Quote number:	3
Sales Person:	Max Jensen
Valid until:	05/30/2013

Bill To	Ship To
Waverly Trading House	Waverly Trading House
48920 San Carlos Ave	48920 San Carlos Ave
New York, NY, 35772	New York, NY, 35772
USA	USA

Reflective Mirrors

Quantity	Part Number	Product	List Price	Unit Price	Ext. Price	Discount:
2	186990XYZ987	Reflective Mirror Widget	$1,325.00	$1,600.00	$3,200.00	$0.00

Subtotal:	$3,200.00
Discount:	$0.00
Discounted Subtotal:	$3,200.00
Tax:	$264.00
Shipping:	$0.00
Total	$3,464.00

Grand Total

Currency:	USD	Subtotal:	$3,200.00
		Discount:	0.00
		Discounted Subtotal:	$3,200.00
Tax Rate:	8.25%	Tax:	$264.00
Shipping Provider:		Shipping:	$0.00
		Total	$3,464.00

Invoice:

Emailing Quotes as PDFs

Users also have the option to email quotes to clients in PDF format (i.e. Quote or Invoice) using Sugar's email client. The Email PDF option generates and attaches the PDF document of the quote to be emailed to the client. Both the Quote and Invoice formats list the details (e.g. quantity, product name, etc.) of the items or services for purchase as well as the associated price (e.g. list price, unit price, tax, total, etc.). Normally, the quote will be sent to the client to approve the quote's terms then the invoice is sent once they agree to purchase your product or service.

Please note that administrators in Sugar must first configure the outbound mail server for the system via Admin > Email Settings in order for users to send outbound emails. For more information on setting up the system email settings, please refer to the Emails documentation in the Administration guide. Users will also need to have their email settings configured in their user preferences prior to sending outbound email from the Emails module. For more information on setting up your user preferences' email settings, please refer to the Getting Started documentation.

Use the following steps to email a quote as PDF:

1. Navigate to a quote record's detail view.
2. Hover on the Email PDF option in the Actions menu and choose either "Quote" or "Invoice".

3. The compose email option will open in the Emails module.
   - The email's To field will automatically populate with the email address of the selected account or contact (if related).
   - You can update the Subject field if you wish and enter a body for the email message.
   - Please note that the Quote or Invoice PDF document will automatically be attached to the email. To view the attached PDF document, click the left arrow on the upper right corner of the Compose window.

4. Click "Send" to send the quote or invoice to the client.

Once the email is sent successfully, the email record will appear in the History subpanel of the quote, account, and contact (if related) record. For more information on sending emails from Sugar, please refer to the Emails documentation.

Viewing Quote Change Logs

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

Updating Currency Rates

When saving a quote in a currency that differs from the system-defined default currency, Sugar will store the conversion rate for that currency at the record level. This conversion rate is used to calculate the Converted Amount when the field is set to use the system default currency (as opposed to the user's preferred currency which is explained below). To keep amounts historically accurate, the conversion rate will only update on a quote provided the quote stage is not set to "Closed Accepted", "Closed Lost", or "Closed Dead". If the quote is in any other stage, the conversion rate will update under the following scenarios:

- The quote undergoes a save event (e.g. mass update, manual save, etc.) and the record's currency has a different conversion rate defined in Admin > Currencies than is currently saved in the quote.
- An administrator updates the currency exchange rate under Admin > Currencies. This will trigger a scheduled job which updates all quotes saved with that currency to the new rate.

When the viewing user's profile has the Show Preferred Currency option selected, the Converted Amount field displays the Transactional Amount in the user's preferred currency. In this case, the conversion rate used to calculate the Converted Amount's value is drawn directly from the conversion rate at the system level rather than any conversion rate stored on the record. This means that the value will always use the current conversion rate regardless of the opportunity's sales stage. For this reason, the Converted Amount field should not be considered historically accurate for closed quotes when it is using the user's preferred

currency. For information about setting a user's Preferred Currency and Show Preferred Currency options, please refer to the [User Profile](#) documentation.

For more information about currency exchange rates, please refer to the [Currencies](#) documentation in the Administration guide.

Last Modified: 09/22/2016 06:00pm

Products

Overview

Sugar's Products module consists of all products that have already been sold or are in the process of being sold to clients. The list of products sold by your organization is housed in Admin > Product Catalog and administrators have the ability to add new products as necessary. When creating products, you have the option to either select products from the catalog or create new products via the Products module. There are various ways you can create products in Sugar such as via the Products module, Quotes module, duplication, importing products, etc. Once the product record is created, you can view and edit information pertaining to the product via the Products detail view. This documentation will cover how to use the Products module as well as the various actions and options available from within the module.

Product Fields

The Products module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the [Studio](#) documentation in the Administration guide.

Field	Description
Account Name	The account to which the product belongs
Asset Number	The product's internal inventory number
Book Value	The book value of the product upon order
Book Value Date	The date on which the product was

	ordered
Category	The category to which the product belongs

Note: For more information on creating product categories, please refer to the documentation in the Administration guide. |
Contact Name	The contact to which the product belongs
Cost	The actual cost of the product displayed in the transactional currency
Currency	The currency type (e.g. US Dollars) in which the account will pay for the product
Date Created	The date the product record was created
Date Modified	The date the product record was last modified
Description	A description or other information about the product
Discount in %	Indication that the offered discount rate is a percentage value
Discount Rate	Discount amount offered on the product, if applicable
Discount Total	The total discount offered on the product
List	The List Price converted to and displayed in the system's default currency or the user's preferred currency when the Show Preferred Currency option is enabled on the viewing user's profile

Note: This field is only available in the list view. For more information about the List field, please see About the List and Price Fields |
| List Price | The quoted list price of the product displayed in the transactional currency |
| Manufacturer | The manufacturer for the product |

	Note: For more information on creating and managing manufacturers, please refer to the Products and Quotes documentation in the Administration guide.
Mft Part Number	The manufacturer's part number for the product
Modified by Name	The Sugar user who last modified the product record
Price	The Unit Price converted to and displayed in the system's default currency or the user's preferred currency when the Show Preferred Currency option is enabled on the viewing user's profile

Note: This field is only available in the list view. For more information about the List field, please see About the List and Price Fields |
Pricing Factor	The variable pricing factor depending on the pricing formula
Pricing Formula	The pricing formula for the product
Product URL	The web address of product if available online
Product	The product's name as selected from the product catalog list or manually entered as new

Note: For more information on creating and managing the product catalog, please refer to the Products and Quotes |
Purchased	The actual purchase date of the product
Quantity	The number of products purchased
Quote Name	The quote to which the product belongs
Serial Number	The serial number for the product
Status	The current status of the product
Support Contact	The name of user responsible for providing product support
Support Desc	Brief description or other information regarding the support provided

Support Expires	The date when product support ends
Support Starts	The date when product support starts
Support Term	The term (e.g. six months, one year, etc.) in which support will be provided for the product
Support Title	The title of the support representative providing product support
Tax Class	Tax classification (e.g. taxable, non-taxable) for the product
Teams	The Sugar team(s) assigned to the product record
Type	The specified product type Note: For more information on creating product types, please refer to the Products and Quotes documentation in the Administration guide.
Unit Price	The unit price of the product displayed in the transactional currency
Vendor Part Number	The vendor's part number for the product
Weight	The weight of the product

Products Module Tab

The Products module tab is typically located under the More tab of the navigation bar at the top of any Sugar screen. Sugar normally displays the top six modules shown in the Display Modules list of your user preferences, so the remaining displayed modules are grouped under the More tab. For more information on displayed modules for the navigation bar, please refer to the Layout Options section of the Getting Started documentation. Click the tab to access the Products list view. You may also hover on the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of products you last viewed in the module. The Favorites Menu displays the list of products you most recently marked as favorites in the module.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Product	Opens the edit view layout to create a new product
View Products	Opens the list view layout to search and display products
Import Products	Opens the import wizard to create or update products using external data

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

- The top navigation bar may be filtered based on a specific tab grouping (e.g. Activities, Reports, etc.) of which the Products module is not a member. Click the More tab (last tab on navigation bar) then hover on "Filter Menu By" to check how the navigation bar is grouped. For more information on tab grouping, please refer to the User Interface documentation.
- The Products module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Products module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Products module for your entire Sugar instance. Reach out to your Sugar administrator to have the Products module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

Creating Products

There are various methods for creating products in Sugar including via the Products module, Quotes module, quick create, duplication, and importing products. The full edit view layout opens when creating the product directly from

the Products menu and includes all of the relevant fields for your organization's products. Please note that administrators have the ability to create and manage items from the product catalog, product category, product type, and manufacturer list via Admin > Products and Quotes. For more information on how to create and manage these product fields, please refer to the [Products and Quotes](#) documentation in the Administration guide. The quick create form is a shortened version of the products edit view and typically contains fewer fields. Both the Edit View and Quick Create layouts can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#) documentation in the Administration guide.

Creating Via Products Module

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

1. Hover on the Products module and select "Create Product".

2. Enter appropriate values for the [fields](#) in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
   - You can either select an existing product from the product catalog or enter a new product in the Product field. Please note that new products you create via the Products module will not be added to the product catalog.
3. Once the necessary information is entered, click "Save".

Creating Via Quotes Module

The Quotes edit view layout allows you to select products from the product catalog

to add as line items when creating the quote. You can also manually enter new products that are not available in the product catalog to your quote. The product added to each quote line item creates a new record in the Products module when the quote is saved. For more information on adding products to quote line items, please refer to the Creating Quotes section of the Quotes documentation.

Creating Via Quick Create

You can quick create a product from any Products subpanel on related module records. Please note that administrators have the ability to disable subpanels for the entire instance via Admin > Display Modules and Subpanels. Reach out to your Sugar administrator to have the Products subpanel displayed if it is not available. For more information on displaying and hiding subpanels throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

Use the following steps to create a product via Quick Create:

1. Select "Create" on any Products subpanel on a related module's detail view.

2. Enter appropriate values in the fields in the quick create form. All required fields are marked with a red asterisk and must be completed prior to saving.
3. If additional fields are desired, click the Full Form button to use edit view instead.
4. Once the necessary information is entered, click "Save".

Creating Via Duplication

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

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

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

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

Importing Products

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

Use the following steps to import products via the Import Products option:

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

2. In Step 1, select the import file and choose "Create new records only". Click "Next".
3. In Step 2, confirm the import file properties. Click "Next".
4. In Step 3, confirm the field mappings for the import. Click "Next".
5. In Step 5, view the import results.
    - The Created Records tab will show all of the new product records.
    - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
    - The Errors tab will show records that were not imported due to errors detected during import.

Viewing Products

There are various options available for viewing product records in Sugar including via Products list view, Products detail view, Products Recently Viewed menu, dashlets, and reports. Please note that you will only be able to see product records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide.

Viewing Via List View

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

Viewing Via Detail View

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

Viewing Via Recently Viewed

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

Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets which allow users to get a quick view of various records, activities, reports, etc. You can view product information in dashlets based on other modules such as "My Notes". Clicking a product's name from any dashlet will open the product in detail view. For more information on using dashlets and viewing product records via dashlets, please refer to the [Modules](#) section of the Home documentation.

Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding products and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the product record's detail view by clicking the product's name in the report results. Please note that you can only directly access product detail views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the [Reports](#) documentation.

Name: Products Reports
Modules: Products, Products > Account
Display Columns: Product, Cost, Account Name
Schedule: None
Filters: None

Type: Rows and Columns Repo
Teams: Global
Assigned to: Administrator

		(1 - 3 of 3)
Product ⇕	Cost ⇕	Account Name ⇕
TK 1000 Desktop ✎	$500.00	DD Furniture Inc ✎
TK m30 Desktop ✎	$1,300.00	Tracker Com LP ✎

Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

Searching Products

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

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

Basic Search

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

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

- Search : Click the Search button or press your Return/Enter key to perform

the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Favorites : Select this box to return only records you have marked as favorites.

Search Products

| Product | | My Favorites ☐ | Search | Clear | Advanced Search |

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Favorites" and enter a product name, Sugar will only return product records with a matching name that you have marked as favorites. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all product records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see product records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

Administrators can configure what fields appear on the Products Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Advanced Search

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

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

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

- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the [Saved Search](#) section of the Search documentation.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select "My Favorites" and enter in a product name to search, Sugar will only return product records with a matching name that you have marked as favorites. When searching by a multiselect or dropdown field (e.g. "Type"), however, Sugar will return records matching any of these selections. Once the search completes, the relevant results will populate in the [list view](#) below the search panel.

To see all product records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see product records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide.

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

Products List View

The Products list view displays all product records meeting the current search criteria and to which your user has access. You can view the basic details of each product within the field columns. Please note that you will only be able to see product records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

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

Pagination

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

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

Checkbox Selection

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

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

Actions Menu

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

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

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

Favorite Designation

Users have the option to mark product records as favorites via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Products module tab. In the Products list view, the star on the left of each product's row is yellow once marked to indicate a favorite product. For more information on how to mark records as favorites, please refer to the Favoriting Products section of this documentation.

Column Sorting

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

About the List and Price Fields

The stock Products list view contains two fields, List and Price, that are based on the List Price and Unit Price fields. Both List Price and Unit Price are displayed in the transactional values of the product.

When the viewing user's Show Preferred Currency option is selected in their user profile, the List and Price fields will convert the transactional values to the user's preferred currency. In this situation, the List and Price field values will update immediately to reflect the current conversion rates.

When it is unchecked, the List and Price fields will be displayed in the system default currency. In this situation, the List and Price field values are updated according to changes in the conversion rate by a scheduled process when the relevant exchange rate is modified via Admin > Currencies. For information about setting a user's Preferred Currency and Show Preferred Currency options, please refer to the [User Profile](#) documentation.

For more information on how currency changes affect these value please see

[Updating Currency Rates](#).

Products Detail View

The Products detail view displays thorough product information including all product fields. You can also view a product's related records (e.g. Documents) which appear in [subpanels](#) beneath the product fields. The detail view can be reached by clicking a product record's link from anywhere in the application including from the Products list view.

Please note that you will only be able to view a product record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Actions Menu

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

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

Menu Item	Description
[Edit](#)	Edit this product
[Duplicate](#)	Duplicate this product
[Delete](#)	Delete this product
[View Change Log](#)	View a record of changes to this product

Favorite Designation

Users have the option to mark product records as a favorite via the detail view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Products module tab. In the Products detail view, the star on the right of the product's name is yellow once marked to indicate a favorite product. For more information on how to mark records as favorites, please refer to the [Favoriting Products](#) section of this documentation.

Next or Previous Record

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

Subpanels

Beneath a product record's fields are subpanels containing related records from various modules and the product's notes.

Related Record Subpanels

The most common type of subpanel displayed on a product's detail view contain the product's related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a

subpanel. For example, m ultiple documents may be related to a product, so the documents will be displayed in a subpanel beneath the fields.

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

Related record subpanels allow the following operations to be performed. Please note that administrators in Sugar can change the subpanel's Action menu to be displayed as separate buttons instead of a dropdown via Admin > System Settings. For more information, please refer to the [System](#) documentation in the Administration guide.

- To view the details of a related record, click the record's name in the subpanel to open it in detail view.
- To relate an existing record to the product, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the product, choose "Create" from the subpanel's Action menu, then complete the Quick Create form and click "Save". Please note that for the Notes subpanel the full edit view layout will open to create the note.
- To delete the product's relationship to a record, choose "Unlink" from the dropdown on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

Please note that administrators can prevent users from moving subpanels to different locations in the detail view. For more information on preventing rearranging of subpanels, please refer to the [System](#) documentation in the Administration guide. Check with your system administrator if you are not able to rearrange your subpanels.

Related Products Subpanel

The Related Products subpanel allows users to relate similar products to the product record to keep track of it in the system. Simply click "Select" from the subpanel's Action menu and the products pop-up window will open. You can search and select the desired product(s) in the pop-up window to relate to the current product record. The related product(s) will appear in the Related Products subpanel of the product record.

Notes Subpanel

The Notes subpanel allows users to create new note records to relate to the product. To create the note, simply click "Create" from the subpanel's Action menu and the notes full edit view layout will open. Enter in all the relevant information for the note then click "Save". The note will automatically be related to the product and will appear in the Notes subpanel of the product record.

Editing Products

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

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

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

Editing Via Detail View

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

Editing Via List View

You can edit products via the list view by clicking the Pencil icon to the left of each product's name. A pop-up window will open with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve your changes.

Editing Via Reports

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

Name: Lead Report
Modules: Leads, Leads > Email Address, Leads > Assigned to User
Display Columns: Leads Name, Email Address, User Name
Schedule: None
Filters: None

Type: Rows and C
Teams: Global
Assigned to: Max

	(1 - 100
Leads Name ⇕	**Email Address** ⇕	**User Name** ⇕
Raphael Ahumada 🖉	sales.phone.the@example.com	sally

Deleting Products

If a product record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Products detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting product records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

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

Deleting Via Detail View

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

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

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

Mass Deleting Via List View

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

1. Navigate to the Products list view by clicking the Products module tab.
2. Use the Basicor Advanced Searchto find the Product records you wish to delete.
3. Select the desired product records individually or using the checkbox dropdown'soptions.
4. Choose "Delete" from the Actions menu.

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

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

Exporting Products

Sugar's Export option allows users to download all fields for the selected products to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Product data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered products back into Sugar. For more information on updating existing records via import, please refer to the Import documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of product records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

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

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

Mass Updating Products

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

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

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

1. Navigate to the Products list view by clicking the Products module tab.
2. Use the list view's Basicor Advanced Search to identify products you wish to modify.
3. Select the desired products individually or using thecheckbox dropdown's options.
4. Choose "Mass Update" from the Actions menu.

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

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

Favoriting Products

Each Sugar user has the option to designate their own favorite products which are important or will be viewed often so that they can easily be accessed via search or from the Products module tab. Once records are marked as favorites, use the My Favorites checkbox in the Products [Basic](#)or [Advanced Search](#)to retrieve your favorites or select from your most recent favorites directly from the [Products module tab](#).

Favoriting Via List View

Use the following steps to mark records as favorites via the Products list view:

1. Navigate to the Products list view by clicking the Products module tab.
2. Use the [Basic](#)or [Advanced Search](#) to find the Product records you wish to mark as favorites.
3. Mark the star icon on the left of each desired product's row.
4. To remove the product as a favorite, click the star again to revert it to white.

Favoriting Via Detail View

Use the following steps to mark records as favorites via the Products detail view:

1. Navigate to a product record's detail view.
2. Click the star icon to the right of the product's name in the upper left of the detail view to designate it as a favorite.
3. To remove the product as a favorite, click the star again to revert it to white.

Viewing Product Change Logs

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

Updating Currency Rates

When saving a product in a currency that differs from the system-defined default currency, Sugar will store the conversion rate for that currency at the record level. This conversion rate is used to calculate the Price and List fields when they are set to use the system default currency (as opposed to the user's preferred currency which is explained below). To keep amounts historically accurate, the conversion rate will only update on a product provided the status is not set to "Shipped". If the product is in any other sales stage, the conversion rate will update under the following scenarios:

- The product undergoes a save event (e.g. mass update, manual save, etc.) and the record's currency has a different conversion rate defined in Admin > Currencies than is currently saved in the product.
- An administrator updates the currency exchange rate under Admin > Currencies. This will trigger a scheduled job which updates all products saved with that currency to the new rate.

When the viewing user's profile has the Show Preferred Currency option selected, the Price and List fields display in the user's preferred currency. In this case, the conversion rate is drawn directly from the conversion rate at the system level rather than any conversion rate stored on the record. This means that the value will always use the current conversion rate regardless of the product's status. For this reason, the Price and List fields should not be considered historically accurate for closed business when it is using the user's preferred currency. For information about setting a user's Preferred Currency and Show Preferred Currency options, please refer to the User Profile documentation.

For more information about currency exchange rates, please refer to the Currencies documentation in the Administration guide.

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Contracts

Overview

Sugar's Contracts module consists of individual business arrangements your organization has with vendors, customers, or association. There are various ways you can create contracts in Sugar such as via the Contracts module, importing contracts, duplication, etc. Once the contract record is created, you can view and edit information pertaining to the contract via the Contracts detail view. Each contract record may then relate to other Sugar records such as opportunities, documents, quotes, and many others. This documentation will cover how to use the Contracts module as well as the various actions and options available from within the module.
Note: This module is hidden by default. The administrator must display it for your use.

Contract Fields

The Contracts module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the [Studio](#) documentation in the Administration guide.

Field	Description
Account Name	The account to which the contract belongs
Assigned To	The Sugar user assigned to the contract
Company Signed Date	Date on which your organization signed the contract
Contract Name	The name or designation of the contract
Contract Term	Calculation of days between the start and end date of the contract
Contract Value	The value of the contract for the specified currency
Currency	The currency used to represent the contract value
Customer Signed Date	Date on which the account signed this contract
Date Created	The date the contract record was created

Date Modified	The date the contract record was last modified
Description	A description or other information about the contract
End Date	Date on which this contract expires
Expiration Notice	Date and time to send a reminder to the assigned user indicating that this contract will expire shortly Note : Assignment notifications must be turned on and the "Process Workflow Tasks" scheduler must be running.
Opportunity Name	The opportunity if any, from which the contract originated or is related to
Reference Code	The internal designation used to refer to this contract
Start Date	Date on which this contract takes effect
Status	The current status of the contract (e.g. Not Started, In Progress, Signed)
Teams	The Sugar team(s) assigned to the contract record
Type	The type assigned to the contract Note : Types are created in Admin > Contract Types and come with no options by default.

Contracts Module Tab

The Contracts module tab is typically located under the More tab on the navigation bar at the top of any Sugar screen to the right of the home cube icon. Depending on your settings, you may have to click "Show More" in order to see the Knowledge Base module tab. Click the tab to access the Contracts list view. You may also hover on the tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform important actions within the module. The

The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Contract	Opens the edit view layout to create a new contract
View Contracts	Opens the list view layout to search and display contracts
Import Contracts	Opens the import wizard to create or update contracts using external data

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

- The top navigation bar may be filtered based on a specific tab grouping (e.g. Activities, Reports, etc.) of which the Contracts module is not a member. Click the More tab (last tab on navigation bar) then hover on "Filter Menu By" to check how the navigation bar is grouped. For more information on tab grouping, please refer to the User Interface documentation.
- The Contracts module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Contracts module in the Hide Modules list, simply move it to the Display Modules list and save. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Contracts module for your entire Sugar instance. Reach out to your Sugar administrator to have the Contracts module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

Creating Contracts

There are various methods for creating contracts in Sugar including via the Contracts module, quick create, duplication, and importing contracts. The full edit

view layout opens when creating the contract directly from the Contracts menu and includes all of the relevant fields for your organization's contracts. The quick create form is a shortened version of the contracts edit view and typically contains fewer fields. When using quick create to make a contract while viewing an existing record of another module, Sugar automatically creates a relationship between both records. For example, if you are viewing an account record (e.g. ABC Company) and create a new contract via the quick create form, the Account Name field in the contract record will automatically populate with "ABC Company", thus creating the relationship. Both the Edit View and Quick Create layouts can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#) documentation in the Administration guide.

Creating Via Contracts Module

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

Use the following steps to create a contract via the Contracts module:

1. Hover on the Contracts module and select "Create Contract".

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

Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also quick create a contract from any Contracts subpanel on related module records.
Note : Quick create for the Contracts module is disabled by default, but can be enabled through Admin > Configure Navigation Bar Quick Create. For more information on how to enable modules to be used for Quick Create, please refer to the Developer Tools documentation in the Administration guide.

Use the following steps to create a contract via Quick Create:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Contract". If you do not see the "Create Contract" option, please click "Show More" to see more Quick Create options. You can also select "Create" on any Contracts subpanel on a related module's detail view.
   From Quick Create menu:

   From subpanel:

2. Enter appropriate values in the fields in the quick create form. All required fields are marked with a red asterisk and must be completed prior to saving.
3. If additional fields are desired, click the Full Form button to use edit view instead.
4. Once the necessary information is entered, click "Save".

Creating Via Duplication

You can also create a new contract by duplicating an existing contract record. The duplicate option is useful if the contract you are creating has similar information to an existing contract.
Use the following steps to create a contract by duplicating an existing record:

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

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

Importing Contracts

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

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

2. In Step 1, select the source of the data you are importing. Click "Next".
3. In Step 2, select the import file and choose "Create new records only". Click "Next".
4. In Step 3, confirm the import file properties. Click "Next".
5. In Step 4, confirm the field mappings for the import. Click "Next".
6. In Step 6, view the import results.
   - The Created Records tab will show all of the new contract records.
   - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
   - The Errors tab will show records that were not imported due to errors detected during import.

Viewing Contracts

There are various options available for viewing contract records in Sugar including via Contracts list view, Contracts detail view, Contracts Recently Viewed menu, dashlets, and reports. Please note that you will only be able to see contract records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentations in the Administration guide.

Viewing Via List View

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

Viewing Via Detail View

The Contracts detail view displays thorough contract information including all contract fields followed by subpanels of the contract's related records belonging to various modules. The detail view can be reached by clicking a contract record's link from anywhere in the application including from the Contracts list view. For

more information on viewing contracts via detail view, please refer to the
[Contracts Detail View](#) section.

Viewing Via Recently Viewed

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

Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets which allow users to get a
quick view of various records, activities, reports, etc. You can view contract
information in dashlets based on other modules such as "My Notes". Clicking a
contract's name from any dashlet will open the contract in detail view. For more
information on using dashlets and viewing contract records via dashlets, please
refer to the Dashlets section of the Home documentation.

Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to
gather key data regarding contracts and their related records. In addition to only
displaying desired fields and relationships, reports can also incorporate complex
filters to only display specific subsets of your records. Once the report is run, you
will be able to view the contract record's detail view by clicking the contract's
name in the report results. Please note that you can only directly access contract
detail views with Rows and Columns-type and Summation with Details-type reports

as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation.

Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Users documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

Searching Contracts

The Contracts list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Contracts list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.
For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.
The buttons and checkboxes available in Basic Search panel have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform

the search.

- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Items : Select this box to return only records assigned to you.
- My Favorites : Select this box to return only records you have marked as favorites.

Schedulers

Job Name		Search	Clear

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

Advanced Search

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

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Favorites : Select this box to return only records you have marked as favorites.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the [Layout Options](#) section of

the Search documentation.

- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the [Saved Search](#) section of the Search documentation.

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

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

Global Search

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

To use global search, you need to first enter the keyword into the search box. With Full Text Search enabled, pop-up results will begin appearing once you input three or more characters. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. When Full Text Search is not enabled, results starting with your keyword will appear after clicking the

magnifying glass icon or hitting your Return/Enter key. For more information on using and configuring Global Search, please refer to the [Global Search](#) section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results. For more information on configuring your Global Search, please refer to the [Search](#) documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the [Studio](#) documentation as well as the [Search](#) section of the System documentation in the Administration guide.

Contracts List View

The Contracts list view displays all contract records meeting the current search criteria and to which your user has access. You can view the basic details of each contract within the field columns. Please note that you will only be able to see contract records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentations in the Administration guide. You have the option to change what fields are displayed in list view by configuring your layout options in the Contracts Advanced Search. For more information on configuring your list view, please refer to the [Layout Options](#) section of the Search documentation. Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Pagination

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

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

Checkbox Selection

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

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

Actions Menu

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

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

Menu Item	Description
Delete	Delete one or more contracts at a time

Mass Update	Mass update one or more contracts at a time
Export	Export one or more contracts to a CSV file

Favorite Designation

Users have the option to mark contract records as favorites via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Contracts module tab. In the Contracts list view, the star on the left of each contract's row is yellow once marked to indicate a favorite contract. For more information on marking records as favorites, please refer to the Favoriting Contracts section of this documentation.

More Information

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

Column Sorting

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

Contracts Detail View

The Contracts detail view displays thorough contract information including all contract fields which are grouped by default into the Overview and Other panels. You can also view a contract's related records (Documents, Notes, Contacts, etc.) which appear in subpanels beneath the contract fields. The detail view can be reached by clicking a contract record's link from anywhere in the application including from the Contracts list view.

Please note that you will only be able to view a contract record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentations in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the

[Studio](#) documentation in the Administration guide.

Actions Menu

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

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

Menu Item	Description
[Edit](#)	Edit this contract
[Duplicate](#)	Duplicate this contract
[Delete](#)	Delete this contract
[View Change Log](#)	View a record of changes to this contract

Favorite Designation

Users have the option to mark contract records as a favorite via the detail view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Contracts module tab. In the Contracts detail view, the star on the right of the contract's name is yellow once marked to indicate a favorite contract. For more information on how to mark records as favorites, please refer to the [Favoriting Contracts](#) section of this documentation.

2013 Yearly Support ⭐

Edit ▾

⌃ Overview

Contract Name: 2013 Yearly Support

Next or Previous Record

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

Prune Database on 1st of Month ⭐

Edit ▾   ⟨ (2 of 12) ⟩

Related Record Subpanels

The most common type of subpanels displayed on a contract's detail view contain the contract's related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. For example, a contract may be related to only one account but related to multiple contacts. This means that the related account will be displayed amongst the contract's fields while contacts will be displayed in a subpanel beneath the fields.
Users with administrator or developer access have the ability to change the fields (e.g. Name, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.
Related record subpanels allow the following operations to be performed. Please note that administrators in Sugar can change the subpanel's Action menu to be displayed as separate buttons instead of a dropdown via Admin > System Settings. For more information, please refer to the System documentation in the Administration guide.

- To view the details of a related record, click the record's name in the subpanel to open it in detail view.
- To relate an existing record to the contract, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the contract, choose "Create" from the subpanel's Action menu, then complete the Quick Create form and click "Save".
- To edit a related record, choose "Edit" on the far right of the record's row.
- To delete the contract's relationship to a record, choose "Unlink" from the dropdown on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

Please note that administrators can prevent users from moving subpanels to different locations in the detail view. For more information on preventing rearranging of subpanels, please refer to the [System](#) documentation in the Administration guide. Check with your system administrator if you are not able to rearrange your subpanels.

Signing Documents

The documents subpanel gives users the ability to create and select documents to be attached to the contract record. Template documents give users the ability to perform additional actions on the document through the contracts module. This feature is best used for a standard contract or agreement document that the organization will have to sign. Once the contract is signed by the organization, users can click "Sign" on the related document record.

This prompts the user to create a new document record for the signed contract, which will be related to the template document as well as the contract record. You will now see both documents, the original contract template and the signed contract, in the documents subpanel of the contract record.

Name ⬍	File:	Category ⬍	Source ⬍	Status ⬍	Publish Date ⬍			
Max Holdings Signed Yearly Subscription Contract.docx	Max Holdings Signed Yearly Subscription Contract.docx	Sales	Sugar	Active	04/01/2013	⚡ Get latest	edit	▼
Yearly Subscription Contract Form.docx	Yearly Subscription Contract Form.docx	Sales	Sugar	Active	04/01/2013	🖼 Sign	edit	▼

Once a document related to a contract gets revised you have the option of pulling the latest revision to be linked to the contract. Otherwise the version of the document that existed when linked to the contract will remain linked. Click "Get Latest" to link the most recent version of the document to the contract.

Source ⬍	Status ⬍	Publish Date ⬍			
Sugar	Active	04/01/2013	⚡ Get latest	edit	▼
Sugar	Active	04/01/2013	🖼 Sign	edit	▼

Editing Contracts

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

Process Workflow Tasks » Edit

Save   Cancel

Job Name: *   Process Workflow Tasks

Job: Process Workflow Tasks

Advanced Options: ☐

Interval: *   Every 1   ☑ Every Day   ☑ Thursday
         Minutes   ☑ Monday   ☑ Friday
            ☑ Tuesday   ☑ Saturday
            ☑ Wednesday   ☑ Sunday

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

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

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

Editing Via Detail View

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

Prune Database on 1st of Month ⭐

Edit ▾

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

Editing Via List View

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

Scheduler ⇕	Interval
☐ ☆ ✎ **Run Full-text Index**	As often as possible.

Editing Via Reports

Sugar reports also allow you to edit a contract record by clicking on the pencil icon next to a contract's name. This opens a pop-up window with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes.

Name: Accounts Report
Modules: Accounts, Accounts > Email Address
Display Columns: Name, Email Address
Schedule: None
Filters: None

Type: Rows and Columns Re;
Teams: Global
Assigned to: Max Jensen

|◀ ◀ (1 - 42 of 42) ▶

Name ⇕	Email Address ⇕
Evermore Company ✎	evermore@example.com

Please note that you may only directly edit contracts from Rows and Columns-type or Summation with Details-type reports as Summation-type and Matrix-type reports do not include the pencil icon. For more information on reports, please refer to the [Reports](#) documentation.

Deleting Contracts

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

wish to also delete any related records to avoid orphaned records.

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

Deleting Via Detail View

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

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

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

Mass Deleting Via List View

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

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

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

Due to PHP memory limitations on the server, there may be occasions when the application times out while deleting a large number of contract records. If you

encounter an error when performing this action, we recommend selecting the records in smaller batches.

Exporting Contracts

Sugar's Export option allows users to download all fields for the selected contracts to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Contract data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered contracts back into Sugar. For more information on updating existing records via import, please refer to the Import documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of contract records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

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

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

Mass Updating Contracts

Mass Updating allows users to make the same change to multiple contract records at once from the Contracts list view. Users with administrator or developer access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information

on configuring mass update, please refer to the Studio documentation in the Administration guide. Due to the PHP memory limitations on the server, there may be occasions when the application times out while mass updating a large number of contract records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

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

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

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

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

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

Favoriting Contracts

Each Sugar user has the option to designate their own favorite contracts which are important or will be viewed often. Once records are marked as favorites, use the My Favorites checkbox in the Contracts [Basic](#) or [Advanced Search](#) to retrieve your favorites or select from your most recent favorites directly from the [Contracts module tab](#) .

Favoriting Via List View

Use the following steps to mark records as favorites via the Contracts list view:

1. Navigate to the Contracts list view by clicking the Contracts module tab.
2. Use the [Basic](#) or [Advanced Search](#) to find the contract records you wish to mark as favorites.
3. Click the star icon on the left of each desired contract's row.
4. To remove the contract as a favorite, click the star again to revert it to white.

Favoriting Via Detail View

Use the following steps to mark records as favorites via the Contracts detail view:

1. Navigate to a contract record's detail view.
2. Click the star icon to the right of the contract's name in the upper left of the detail view to designate it as a favorite.
3. To remove the contract as a favorite, click the star again to revert it to white.

Prune Database on 1st of Month ⭐

Edit ▾

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

Viewing Contract Change Logs

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

One Year Subscription ⭐

Edit ▾
Duplicate
Delete
View Change Log   ame: One Year Subscription
    Reference Code:
    Account Name: Max Holdings Ltd

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

Documents

Overview

Sugar's Documents module gives your users a way to access and update company-specific files. These files can range from internal policies to customer-distributed content. There are various ways you can create documents in Sugar such as via the Documents module and via the quick create menu. Once the document record is created, you can view and edit information pertaining to the document via the Documents detail view. Each document record may then relate to other Sugar records such as accounts, cases, opportunities, and many others. This documentation will cover how to use the Documents module as well as the various

actions and options available from within the module.

Document Fields

The Documents module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the [Studio](#) documentation in the Administration guide.

Field	Description
Assigned To	The Sugar user assigned to the document
Category	Primary category for locating documents
Description	A description or other information about the document
Document Name	The name or designation of the Document (Defaults to the filename of the Document)
Document Type	The type of the Document (e.g. NDA, Mail Merge, License Agreement, etc.)
Exiration Date	The date the Document expires
File Name	Click "Choose File" to navigate to the location to upload a Document
Publish Date	The date the Document is published (Defaults to today)
Related Document	A Document record that is related to this Document
Related Document Revision	The Related Document's current revision
Revision	The most recent revision number for the Document Note: The Revision field becomes read-only after the initial save.
Source	Where the Document is stored (i.e Sugar, Google, IBM SmartCloud, etc.)
Status	The current status of the document (e.g. Active, Draft, Expired, etc.)

Sub Category	Secondary category for locating documents
Teams	The Sugar team(s) assigned to the document record
Template	Classifies a Document as a template or not

Documents Module Tab

The Documents module tab is typically located under the More tab on the navigation bar at the top of any Sugar screen to the right of the home cube icon. Depending on your settings, you may have to click "Show More" in order to see the Documents module tab. Click the tab to access the Documents list view. You may also hover on the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The

The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Document	Opens the edit view layout to create a new document
View Documents	Opens the list view layout to search and display documents
Mail Merge	Opens up the Mail Merge wizard Note : Only shows when Mail Merge is enabled in Admin > System.

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

- The top navigation bar may be filtered based on a specific tab grouping (e.g. Activities, Reports, etc.) of which the Documents module is not a member. Click the More tab (last tab on navigation bar) then hover on "Filter Menu By" to check how the navigation bar is grouped. For more information on tab grouping, please refer to the User Interface documentation in the Application guide.

- The Documents module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Documents module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the [Layout Options](#) section of the Getting Started documentation in the Application guide.

- The administrator may have disabled the Documents module for your entire Sugar instance. Reach out to your Sugar administrator to have the Documents module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the [Developer Tools](#) documentation in the Administration guide.

Creating Documents

There are various methods for creating documents in Sugar including via the Documents module, quick create, and via duplication. The full edit view layout opens when creating the document directly from the Documents menu and includes all of the relevant fields for your organization's documents. The quick create form is a shortened version of the documents edit view and typically contains fewer fields. Both the Edit View and Quick Create layouts can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#) documentation in the Administration guide.

Creating Via Documents Module

You can create a library of documents and graphics that you can share with other users and contacts, ranging from marketing collateral to contracts. You can also create templates for frequently used documents. One of the most common methods of document creation is via the Create Document option in the Documents module tab. This opens up the edit view layout which allows you to enter in all the relevant information for the document.

Use the following steps to create a document via the Documents module:

1. Hover on the documents module and select "Create Document".

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

Creating Via Google Docs

Sugar has the ability to create documents in the system that are linked to external sources, the most popular of these is Google Docs, or Google Drive.
Use the following steps to create a document linked to Google Docs via the Documents module:

1. Hover on the documents module and select "Create Document".

2. Select "Google Docs" from the Source dropdown to reveal the External Source selector.

Note : If Google Docs is not an option in the Source dropdown, then you most likely need to connect your Sugar account to your Google Id through your user profile. For more information on how to connect to your Google Id in Sugar, please refer to the [Google Docs Integration](#) section in this documentation.

3. Click "Choose File" to navigate to a file on your local computer. The selected file will be uploaded to Google Docs. Not all file extensions are currently supported for uploading to Google Docs. The following file extensions are currently allowed:

File	Description

CSV	Comma Separated Values
DOC	Microsoft Word 97-2004
DOCX	Microsoft Word
HTML	Web Text File
HTM	Web Text File
JPG	Image File
ODS	OpenDocument Spreadsheet
ODT	OpenDocument Text
PDF	Portable Document Format
PNG	Image File
PPT	Microsoft PowerPoint Presentation
PPS	Microsoft PowerPoint Slideshow
RTF	Rich Text Format
SXW	OpenOffice.org XML
TAB	Tab Separated Values
TXT	Plain Text
TEXT	Plain Text
TSV	Tab Separated Values
XLS	Microsoft Excel 97-2004 Workbook
XLSX	Microsoft Excel Workbook

Alternatively click "File on External Source" to reveal the external source selector.

Click the arrow button to launch the selector. This window will show the 20 most recently modified documents in your Google Drive.
Note : This will only show documents owned by you in your Google Drive, and will show documents through all folders in your drive.
Use the Search box to find a specific document. Select a document by clicking on the document's file name.

Enter appropriate values for the remaining <u>fields</u> in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.

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

Note : Documents that link to an external account (i.e. Google Docs, IBM Smart Cloud) cannot be used as attachments in emails composed through the Sugar Email Client.

Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also quick create a document from any Documents subpanel on related module records.

Use the following steps to create a document via Quick Create:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Document". If you do not see the "Create Document" option, please click "Show More" to see more Quick Create options. You can also select "Create" on any Documents subpanel on a related module's detail view.
   From Quick Create menu:

From subpanel:

2. Enter appropriate values in the [fields](#) in the quick create form. All required fields are marked with a red asterisk and must be completed prior to saving.
3. If additional fields are desired, click the Full Form button to use edit view instead.
4. Once the necessary information is entered, click "Save".

Creating Via Duplication

You can also create a new document by duplicating an existing document record. The duplicate option is useful if the document you are creating has similar information to an existing document. Related records on the original document will not be related to the newly created document, but the last revision of the original document will copy over to the new document with the change log contents : "Document Created".
Use the following steps to create a document by duplicating an existing record:

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

Template-Expense Report

Edit ▾
Duplicate
Delete
File Name: Template-Expense Report

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

Template-Expense Report » Edit

Save   Cancel

⌃ Overview
Source: ⓘ   Google Docs ⬍
File Name: *   Template-Expense Report
Document Name: *   Template–Expense Report 2014

Note : The Source and File Name fields can not be modified when duplicating a document.

Viewing Documents

There are various options available for viewing document records in Sugar including via Documents list view, Documents detail view, Documents Recently Viewed menu, dashlets, and reports. Please note that you will only be able to see document records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentations in the Administration guide.

Viewing Via List View

The Documents list view displays all document records meeting the current search criteria. To access the list view, simply click the documents module tab. While list view shows key document fields, you can click the document's name to open the record in detail view. For more information on viewing documents via list view, please refer to the Documents List View section of this documentation.

Viewing Via Detail View

The Documents detail view displays thorough document information including all document fields followed by subpanels of the document's related records belonging to various modules. The detail view can be reached by clicking a document record's link from anywhere in the application including from the Documents list view. For more information on viewing documents via detail view, please refer to the Documents Detail View section of this documentation.

Viewing Via Recently Viewed

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

Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets which allow users to get a quick view of various records, activities, reports, etc. You can view document information in document-based dashlets such as "My documents". Clicking a document's name from any dashlet will open the document in detail view. For more information on using dashlets and viewing document records via dashlets, please refer to the Modules section of the Home documentation in the Application guide.

Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding documents and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the document record's detail view by clicking the document's name in the report results. Please note that you can only directly access document detail views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation in the Application guide.

Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

Searching Documents

The Documents list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Documents list view below. Global Search allows users to search for information across their entire Sugar

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

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

Basic Search

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

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

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

Schedulers

| Job Name | | Search | Clear |

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Favorites" and enter a document name, Sugar will only return document records with a matching name that you have marked as favorites. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all document records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see document records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentations in the Administration guide.

Administrators can configure what fields appear on the Documents Basic Search via Admin > Studio. For more information on editing layouts, please refer to the

Studio documentation in the Administration guide.

Advanced Search

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

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

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

Global Search

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

To use global search, you need to first enter the keyword into the search box. With Full Text Search enabled, pop-up results will begin appearing once you input three or more characters. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. When Full Text Search is not enabled, results starting with your keyword will appear after clicking the magnifying glass icon or hitting your Return/Enter key. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation in the Application guide.
Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results. For more information on configuring your Global Search, please refer to the Search documentation in the Application guide. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Studio documentation as well as the Search section of the System documentation in the Administration guide.

Documents List View

The Documents list view displays all document records meeting the current search criteria and to which your user has access. You can view the basic details of each document within the field columns. Please note that you will only be able to see document records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentations in the Administration guide. You have the option to change what fields are displayed in list view by configuring your layout options in the Documents Advanced Search. For more information on configuring your list view, please refer to the Layout Options section of the Search documentation in the Application guide. Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Pagination

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

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

Checkbox Selection

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

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

Actions Menu

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

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

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

Favorite Designation

Users have the option to mark document records as favorites via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Documents module tab. In the Documents list view, the star on the left of each document's row is yellow once marked to indicate a favorite document. For more information on how to mark records as favorites, please refer to the Favoriting Documents section of this documentation.

Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time. You can also set a default order-by column using the layout options in

Advanced Search. For more information on setting a default column sort, please refer to the Layout Options section of the Search documentation in the Application guide.

Documents Detail View

The Documents detail view displays thorough document information including all document fields which are grouped by default into the Overview and Revision Details panels. You can also view a document's related records (Document Revisions, Related Contracts, Accounts, etc.) which appear in subpanels beneath the document fields. The detail view can be reached by clicking a document record's link from anywhere in the application including from the Documents list view.

Please note that you will only be able to view a document record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentations in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Actions Menu

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

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

Menu Item	Description
Edit	Edit this document
Duplicate	Duplicate this document
Delete	Delete this document

Next or Previous Record

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

Subpanels

Beneath a document record's fields are subpanels containing related records from various modules, document revision history, and the document's related Contract records.

Related Records Subpanels

The most common type of subpanels displayed on a document's detail view contains the document's related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. For example, a document may be related to only one other document but related to multiple accounts. This means that the related document will be displayed amongst the document's fields while accounts will be displayed in a subpanel beneath the fields.

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

Related record subpanels allow the following operations to be performed. Please note that administrators in Sugar can change the subpanel's Action menu to be displayed as separate buttons instead of a dropdown via Admin > System Settings. For more information, please refer to the [System](#) documentation in the Administration guide.

- To view the details of a related record, click the record's name in the subpanel to open it in detail view.
- To relate an existing record to the document, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the document, choose "Create" from the subpanel's Action menu, then complete the Quick Create form and click "Save".
- To delete the document's relationship to a record, choose "unlink" from the dropdown on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

Please note that administrators can prevent users from moving subpanels to different locations in the detail view. For more information on preventing rearranging of subpanels, please refer to the [System](#) documentation in the Administration guide. Check with your system administrator if you are not able to rearrange your subpanels.

Document Revisions Subpanel

The Document Revisions subpanel lists the document revisions for this document record. The revisions are sorted in descending order on the revision number by default. Each revision retains the copy of the document loaded on that revision. This provides you with the ability to look back at the history of the document to compare revisions.

Note : This does not work as expected with External Documents (i.e. Google Docs, IBM Smart Cloud) as the document is not stored in Sugar for these document sources, but only a link to the document. To retain change history, either utilize Google Doc's change features, or select a different document for every revision. You can click the Create button on this subpanel to create a new revision of the document you are currently viewing. The revision number is automatically populated with the current highest revision number plus one, but can be modified. However, once the new Document is saved, this field becomes read-only for all users.

Note : If you skip numbers, it will not go back and fill in the missing numbers.

You may also populate an optional Change Log field with a short description of the change being made for this revision. Click "Save" to complete the revision record.

Editing Documents

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

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

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

Administrators in Sugar may configure both the Documents edit view and quick create via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

Editing Via Detail View

You can edit documents via the Detail View by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve the changes made.

Editing Via List View

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

Editing Via Dashlets

You can edit documents by clicking the pencil icon to the far right of any documents-based dashlet on your Sugar home page. For example, clicking the pencil icon within the My Documents dashlet will open a pop-up window with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. For more information

on dashlets, please refer to the [Home](#) documentation in the Application guide.

Editing Via Reports

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

Deleting Documents

If a document record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Documents detail view or list view. Deleting via the detail view allows you to delete a single record while the list

view allows for mass deleting multiple records at once. Deleting document records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records. Document revision records will be deleted when deleting the parent document record. Please note that your ability to delete documents in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

Deleting Via Detail View

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

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

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

Mass Deleting Via List View

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

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

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

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

Exporting Document Records

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

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

Please note that your ability to export documents from Sugar may be restricted by

a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

Downloading Documents

Exporting a document from Sugar will only export the document record with the metadata about the document, but the document itself will not be included in the export. In order to download a document from the documents module, simply click on the File Name link in the list view or the detail view and the document will be downloaded to your computer. If the document is linked to an external source (i.e. Google Docs, IBM Smart Cloud), then the file name link will open directly to the doc inside a new window or tab.

Mass Updating Documents

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

updating a large number of contact records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches. Please note that your ability to mass update documents may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

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

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

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

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

Favoriting Documents

Each Sugar user has the option to designate their own favorite documents which are important or will be viewed often so that they can easily be accessed via search or from the documents module tab. Once records are marked as favorites, use the My Favorites checkbox in the Documents [Basic](#) or [Advanced Search](#) to retrieve your favorites or select from your most recent favorites directly from the [Documents Module Tab](#) .

Favoriting Via List View

Use the following steps to mark records as favorites via the Documents list view:

1. Navigate to the Documents list view by clicking the Documents module tab.
2. Use the [Basic](#) or [Advanced Search](#) to find the Document records you wish to mark as favorites.
3. Mark the star icon on the left of each desired document's row.
4. To remove the document as a favorite, click the star again to revert it to white.

Google Docs Integration

Sugar comes with Google Docs (Google Drive) integration by default. In order to be able to create a document in Sugar from a Google Doc in your Google Drive you will first need to link your Google Account with your profile in sugar.
For more information regarding setting up external accounts in your user profile, please refer to the [External Accounts Tab](#) section in the Getting Started document in the Application guide.

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Calendar

Overview

Sugar's Calendar module allows users to easily schedule, view, and manage their activities (e.g. calls, meetings, tasks) in one place. The calendar will show your calls, meetings, and tasks provided you are an invitee on the call or meeting, or the task is assigned to you. You can also view other user's scheduled activities via the shared calendar option. This documentation will cover how to use the Calendar module as well as the various actions and options available from within the module.

Calendar Module Tab

The Calendar module tab is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access your calendar. You may also hover on the tab to display the Actions menu, which allows you to perform important actions within the module.

The Actions menu allows you to perform the following options:

Menu Item	Description
Schedule Meeting	Schedule a new meeting via the Meetings edit view
Schedule Call	Schedule a new call via the Calls edit view
Create Task	Create a new task via the Tasks edit view
Today	View the current day on the calendar

Calendar Actions

When viewing your calendar, there are several options across the top of the calendar to help you navigate the calendar and increase the functionality available.

These buttons are accessible from any calendar screen, with some notable exceptions. Most of the buttons are used to change the view of the calendar to show a specific time period, or jump to a specific period. The buttons are defined as follows:

Options	Description
Day	View the current day on the calendar
Week	View the current week on the calendar
Month	View the current month on the calendar
Year	View the current year on the calendar
Shared	View the shared calendar for other users in Sugar
User List	Select which users will show on the shared calendar Note: This option is only available when viewing the Shared calendar
Calendar Icon	Click the calendar icon to quickly jump to a specific date Note: This option is not available when using the year view
Settings	Change the settings on the calendar as described in Viewing Via Calendar

Creating Activities

There are various methods for creating the different activities available in Sugar, including via the calendar itself, the Calendar module's actions menu, the individual activity's module, or via quick create. The full edit view layout opens when creating the activity from the actions menu or directly from the individual module. The quick create form is a shortened version of the edit view and typically contains fewer fields. When using quick create to make an activity while viewing an existing record of another module, Sugar automatically creates a relationship between both records. For example, if you are viewing a contact record and create a new meeting via the quick create form, the contact will automatically be set as an invitee. Both the Edit View and Quick Create layouts can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

Note: When creating a recurring meeting or call , the record must be created on the calendar or from the full form edit view of the module. The standard quick create form does not include the recurring functionality.

Creating Via Calendar Grid

The calendar allows you to create meetings and calls easily by clicking on the specific date or time when your activity will occur. Clicking on a the calendar will bring up a quick create form where you can dictate if this activity will be a call or a meeting, and the start date and time will be automatically populated with the time slot that you clicked.

Use the following steps to create an activity via the calendar grid:

1. Navigate to the calendar by clicking on the Calendar module tab.
2. Click the time slot that your activity will start to open the quick create form.

3. Select if the activity will be a meeting or a call using the radio buttons at the top of the page.

4. Enter appropriate values for the fields in the Details tab. All required fields are marked with a red asterisk and must be completed prior to saving. Email and popup reminders can be configured from this tab. You can also add invitees to meetings and calls from the Invitees tab, or set them to be recurring from the Recurrence tab.

5. If additional fields are desired, click the Full Form button to use the edit view instead.
6. Once the necessary information is entered, click Save or, if you would like an invitation email to go out to the invitees where they can accept or deny the call or meeting, click Save & Send Invites.

Creating Via Actions Menu

One of the ways to create an activity is via the create options in the Calendar module tab . This opens up the edit view layout which allows you to enter in all the relevant information for the activity.

Use the following steps to create an activity via the Calendar module tab:

1. Hover on the Calendar module and select one of the actions for the type of activity you are creating.

2. Enter appropriate values for the fields in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving. You can also add invitees to meetings and calls, or set them to be recurring . Email and popup reminders can also be configured from this page.
3. Once the necessary information is entered, click one of the save or close options:

Option	Description

Save	Creates the activity record with the given values in the fields
Save & Send Invites	Creates the activity record with the given values in the fields and sends a call or meeting invitation to the listed invitees where they can accept or deny the call or meeting
Close and Create New	Creates the activity record with the given values in the fields, except for the status field which will update to be either "Held" or "Completed", depending on the activity module

Creating Via Activities Modules

Calls, meetings, and tasks will show on the calendar when created from the activity's module. The activity will show on your calendar if you are listed as an invitee on the call or meeting, or if you are the assigned user on the task. Activities can be created directly from the Calls , Meetings , or Tasks modules.

Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also quick create an activity from any Activities subpanel on related module records. The recurring meeting or call functionality is not available in the quick create form. Please use the full form option if you would like to create a recurring event.

Note: It is suggested that if you are going to be relating the activity to any other record in Sugar, it is best practice to create the activity while on the related record's detail view, which will automatically relate the two records.
Use the following steps to create an activity via Quick Create:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Log Call", "Schedule Meeting", or "Create Task" or select "Log Call", "Schedule Meeting", or "Create Task" on any Activities subpanel on a related module's detail view.
   From Quick Create menu:

From subpanel:

2. Enter appropriate values in the fields in the quick create form. All required fields are marked with a red asterisk and must be completed prior to saving.
3. If additional fields are desired, click the Full Form button to use edit view instead. Email and popup reminders can be configured from full form. You can also add invitees to meetings and calls from the full form, or set the call or meeting to be recurring .
4. Once the necessary information is entered, click "Save". If you navigated to the full form, once the necessary information is entered, click Save or, if you would like an invitation email to go out to the invitees where they can accept or deny the call or meeting, click Save & Send Invites.

Adding Reminders

Sugar includes the ability to remind users when they have a call or meeting that is scheduled to begin in a given amount of time. Reminders can be presented to users by a popup window that will appear within your Sugar window or by an email being sent to all of the invitees. By default, reminders have to be manually added to calls and meetings upon creating or editing the activity. Users can update their default reminders to be specific times for each type of reminder through User Preferences .

Adding Email Reminders

Email reminders are scheduled upon creation of or while editing a call or meeting record. The email reminders are emailed to all invitees, including non-Sugar users. Select the "Email all invitees" checkbox in the create activity form and set the time for the reminder email to be sent out by selecting one the options in the dropdown list.

The email that is received by recipients will contain the subject of the call or meeting, the start date and time, and who created the record.

Adding Popup Reminders

Popup reminders are scheduled upon creation of or while editing a call or meeting record. The popup reminders appear for any users listed as invitees, as long as they are logged in to Sugar when the reminder is set to trigger. Select the "Popup" checkbox in the create activity form and set the time for the reminder to appear by selecting one the options in the dropdown list.

The popup that is received by recipients will contain the subject of the call or meeting, the start date and time, and the location of the activity. Click "OK" to open the meeting or call record, or "Cancel" to stay on your current page.

Adding Invitees

Users have the option of adding additional invitees (i.e. Contacts, Leads, Users) to calls and meetings via the Add Invitees or Create an Invitee option in the Calls or Meetings edit or quick create view. Please note that the user creating the call or meeting as well as the contact or lead selected in the Related To field will automatically be added as invitees to the call or meeting. You can simply remove yourself or an attendee from the call by choosing the remove button the Scheduling panel or "Unlink" from the Invitees panel. For more information on removing invitees, please refer to the [Calls] or [Meetings] documentation.

Adding Via Add Invitees

Use the following steps to add attendees via the Add Invitees panel:

1. Navigate to Invitees panel and perform a search to find the attendee you wish to add.
   - The search results will appear below the Add Invitees panel.

2. To add the invitee, click "Add" to the far right of the record's name.
   - Please note that the icons to the left of the record's name indicate if it is a Contact (Rolodex Card icon), Lead (Magnifying Glass icon), or User (People icon) record.

The added invitee(s) will appear in the Scheduling panel in the Calls and Meetings edit view as well as the Invitees subpanel in the detail view. For more information on viewing attendees via the Invitees subpanels, please refer to the Invitees Subpanels section of the Calls and Meetings documentation.

Adding Via Create an Invitee

Use the following steps to add attendees via the Create an Invitee option:

1. Navigate to the Create an Invitee section and click either the As Contact or As Lead button.

2. Enter in the relevant information (e.g. First Name, Last Name, etc.) for the contact or lead then click "Create & Add".
   Note: The created contact or lead record will be added and appear in the corresponding module (Contact or Lead) as well.

The contact or lead will appear as an invitee in the Scheduling panel in the Calls or Meetings edit view as well as the Invitees subpanel in the detail view. For more information on viewing attendees via the Invitees subpanels, please refer to the Invitees Subpanels section of the Calls and Meetings documentation.

Setting Meetings and Calls to Recur

Meetings and calls can be set be recurring events so that users do not have to create individual meeting or call records for regularly occurring events. Recurrences can be set up to occur daily, weekly, monthly, or yearly. When a recurring meeting or call is configured, individual meeting records are created in Sugar, so when viewing the Meetings or Calls list view, all recurrences will show.

Note: Recurring meetings and calls must be created on the calendar or from the full form edit view of the module. The standard quick create form does not include the recurring functionality.

Use the following steps to set a meeting or call to recur from the calendar:

1. Navigate to the Recurrence tab of the calendar creation view.
2. Select the type of recurrence for the call or meeting, either daily, weekly, monthly, or yearly.

3. Select how often you would like the event to recur, and if it will end after a given amount of occurrences, or if it will end by a specific day.
   Note: If the recurrence is weekly, you will be presented with an option to decide which day or days of the week the recurrence should occur.

Use the following steps to set a meeting or call to recur from the edit view:

1. Navigate to the Recurrence panel of the edit view.
2. Select the type of recurrence for the call or meeting, either daily, weekly, monthly, or yearly.

3. Select how often you would like the event to recur, and if it will end after a given amount of occurrences, or if it will end by a specific day.
   Note: If the recurrence is weekly, you will be presented with an option to decide which day or days of the week the recurrence should occur.

Viewing Via Calendar

The Calendar module allows users to schedule, view, and manage various activities (Calls, Meetings, Tasks) in Sugar. The Calendar module can be accessed by clicking the Calendar module tab . The three activity types are color coded as:

Module	Color
Calls	Red
Meetings	Blue
Task	Green

You can click the cell of an existing call or meeting to view the details via the Quick Create form. You can also click the "i" icon to the far right of the call record cell for a quick view of additional details (e.g. Subject, Start Date & Time, Duration, Related to, etc.) of any activity without opening up the record.

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

The Calendar module defaults to the week view and can be viewed as a day, week, month, or year view using the buttons at the top of the page. The week view can be changed to have a different day of the week using the Calendar Options in your user profile. To edit this, click on the First Day of Week dropdown list under the

User Preference's Advanced tab. For more information on the user profile, please refer to the [User Preferences](#) documentation in this guide.

When viewing the day, week, or month view of the calendar, you can jump to a specific date using the calendar popup in the top right of the screen. Select any date within the same month or use the left or right arrows to navigate to previous or upcoming months. You can also jump to today's date with the Today button in the popup calendar, or jump to a specific month or year by clicking on the displayed month in the popup calendar. Alternately, you can jump to the next day, week, month, or year, depending on your current view, using the next and previous buttons at the top and bottom of the calendar view. For more information on using the next and previous buttons, please review the [Next or Previous Calendar View](#) section of this documentation.

The look and feel of the calendar can also be changed via the Settings option to the right of the calendar popup. The settings allow you to perform the following actions:

- Display time slots in Day and Week views : When this option is enabled, activities are displayed in their specified time cells when viewing a day or week via the calendar. If this option is disabled, all activities will appear as a list. This option is enabled by default.
- Start Time : The value set in this field represents the first time cell displayed on your day or week calendar view (e.g. 09:00 am).
  - Note: This option is disabled and hidden if "Display time slots in Day and Week views" is disabled.
- End Time : The value set in this field represents the last time cell displayed on

your day or week calendar view (e.g. 05:00 pm).
  - Note: This option is disabled and hidden if "Display time slots in Day and Week views" is disabled.
- Show Calls : When this option is set to "Yes", scheduled calls are also displayed in the calendar view. If you do not wish to see calls in the calendar view, set this option to "No". This option is set to "Yes" by default.
- Show Tasks : When this option is set to "Yes", scheduled tasks are also displayed in the calendar view. If you do not wish to see tasks in the calendar view, set this option to "No". This option is set to "Yes" by default.
- Show Completed Meetings, Calls and Tasks : When this option is set to "Yes", completed meetings, calls, and tasks are also displayed in the calendar view. If you do not wish to see completed activities in the calendar view, set this option to "No". This option is set to "Yes" by default.

After all settings have been changed, click Apply to update the calendar with your changes.

The calendar can also be viewed on the home page in a dashlet. To add the calendar to your home dashboard, click on the Add Sugar Dashlets button and select "My Calendar" in the modules tab. Once added to your dashboard, the calendar dashlet can be configured to show either your weekly or daily schedule. For more information on dashlets, please review the User Interface documentation.

Viewing Shared Calendar

The Calendar module allows you to view not just your own activities, but you can also view the calendar of other Sugar users using the Shared Calendar. The calendar will show the selected user in a weekly view on one page. Using the shared calendar, users will also have the option to create activities for other users directly from the calendar. For more information on using the shared calendar, please review the Shared Calendar section of this documentation.

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

Moving Scheduled Activities

The Sugar calendar allows for the start time and duration of meetings and calls to be edited from the calendar, instead of having to directly edit the activity record through the module. The records that appear on the calendar can be dragged and dropped to new locations to change the start date and time.

Note: All occurrences of recurring meetings and calls cannot be modified by

dragging one record of the series.

In addition, the activities can be dragged from the bottom of the box to be able to change the duration of the activity. To do this, simply hover over the activity's box to make the two lines appear at the bottom. Click those two lines and drag to your new duration.

Note: Changing the meeting details with drag-and-drop does not send a system-generated update to the meeting invitees.

More Information

Additional details for each activity can be viewed by clicking the "i" icon on the far right of each activity block on the calendar. This provides users a quick view of additional information in addition to what appears on the block. The popup window can also be used to access the record. Click the Pencil button to view the edit view for the record, the Eyeball button to view the detail view of the record, or the "X" button to close the popup window.

The resulting popup window will show the following fields by default:

Module	Fields
Calls	Start Date & Time Duration Related to Description (abbreviated)
Meetings	Start Date & Time Duration Related to Description (abbreviated)
Tasks	Start Date & Time Due Date & Time Priority Status Description (abbreviated)

Note: The list of fields appearing here may only be configured through a code-level customization.

Next or Previous Calendar View

On the four corners of the Calendar, there are buttons that allow you to page

through the given time frame in groups at a time, either the next or previous day, week, month, or year. The timeframe will change depending on which calendar you are viewing. When viewing the shared calendar , these buttons will always paginate by the week.

Editing Activities

Activities on the calendar can be edited directly from the calendar instead of having to access the record throughout the individual modules. Dragging and dropping activity cells within the calendar can make changes to the start date and time and the duration. For more information about moving activities from within the calendar, please refer to the Moving Scheduled Activities section of this documentation. You can make other changes to existing activity records via the quick create or edit view forms. Use the following steps to edit an activity via the calendar:

1. Navigate to the calendar by clicking on the Calendar module tab.
2. Locate the activity you would like to edit and click on the cell to open the quick create form for that module with all of the details of the record filled in. When viewing the quick create form, you can click on Full Form to reach that record's edit view.
   Note: Tasks cannot be edited directly from the calendar using the quick create form.

3. Make the necessary changes to the activity, including setting reminders , adding invitees , or set any recurrences of the activity.
4. Once the necessary information is entered, click Save or, if you would like an invitation email to go out to the invitees where they can accept or deny the call or meeting, click Save & Send Invites.

The full form edit view can also be reached by clicking the Pencil button on the More Information popup for the activity. Please review the More Information section of this documentation for more information about using this popup.

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

Administrators in Sugar may configure all of the edit view and quick create forms via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

Editing Recurring Meetings and Calls

When a meeting or call is set to be recurring, additional copies or duplicates of the call or meeting record are created for the specific time and date of each recurrence. Therefore, editing one record's cell on the calendar will not affect the other recurrences of the same call or meeting and will only affect the one recurrence you are editing. Changes to recurring events must be made from the Recurrence tab on the meeting or call's quick create form. Use the following steps to edit a recurring meeting or call:

1. Click on one instance of the recurring event that you would like to update.
2. Navigate to the Recurrence tab and click "Edit All Recurrences".

3. Change the recurrence cycle of the event, how often you would like it to repeat, and when you would like it to end.

4. Once the necessary information is entered, click Save or, if you would like an invitation email to go out to the invitees where they can accept or deny the call or meeting, click Save & Send Invites.

Deleting Calls and Meetings Via Calendar

If a call or meeting record is invalid or should no longer appear on your calendar or in Sugar, it may be deleted via the quick create view. Deleting via the quick create view allows you to delete a single record directly from the calendar, instead of having to navigate to the module and re-locate the record.

Note: Tasks cannot be edited or deleted directly from the calendar using the quick create form.

Use the following steps to delete a call or meeting from the calendar:

1. Navigate to the calendar by clicking on the Calendar module tab
2. Locate the call or meeting you would like to edit and click on the cell to open the quick create form for that module
3. Click Delete at the bottom of the form, and then "OK" on the confirmation popup message

Recurring calls and meetings can be deleted by this method if you would like to delete the individual call or meeting. Deleting one record through this process will not remove the entire series. Use the following steps to delete a recurring series of calls or meetings from the calendar:

1. Click on one instance of the recurring event that you would like to update
2. Navigate to the Recurrence tab
3. Click "Delete All Recurrences" and then "OK" on the confirmation popup message

Please note that your ability to delete calls and meetings in Sugar may be restricted by a role. For more information on roles, please refer to the Role

[Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

Shared Calendar

The Shared Calendar option in the Calendar module allows you to view other user's calendars so as to help you schedule with other users or keep track of their activities. The shared calendar also gives you the ability to schedule meetings and calls for other users so that they are automatically an invitee to the activity and the assigned user, as if they had created it themselves. The Shared Calendar is always viewed as a weekly view. Use the following steps to enable the shared calendar:

1. Navigate to the calendar by clicking on the Calendar module tab.
2. Click on the Shared button in the list of the different view types.

3. Click the User List button to select the user's calendars you would like to view.

   Note: You can filter the user list by the team that users are associated with using the dropdown above the user list.

4. Click Select after choosing the users to display all of the user's weekly calendars on the Calendar page.

Please note that you will only be able to see and edit activity records on the shared calendar as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Teams](#) and [Roles](#) documentation in the Administration guide.

Publishing Calendars

Sugar allows users to share calendars between applications so as to ensure that activities do not overlap between calendars. The Sugar calendar can be viewed in other applications, including the Outlook calendar displaying the user's free/busy time from Sugar.

Publishing Your Sugar Calendar

Sugar calendars can be shared and viewed with various iCal compatible calendar applications (e.g. Apple iCal or Google Calendar). The calendars are viewable as read-only in the external calendar applications and any edits to existing activities can only be done in Sugar. For more information on sharing your calendar on another application, please review the [Calendar Options](#) section in the Getting Started guide.

Publishing to Your Outlook Calendar

You can specify settings in another application, such as Outlook, to enable the ability to view a user's free/busy information from the Sugar calendar. The settings must be configured on each user's computer. Once configured, the invitee shows as busy for any times currently scheduled in Sugar if the user's email address in Sugar matches the invitee email address in Outlook.

Use the following steps to configure this functionality:

1. In Sugar, navigate to your [user preferences](#) and select the Advanced tab
2. Copy the "Search location" URL located at the bottom in the Calendar Options panel
3. In Outlook, go to File > Options > Calendar > Free/Busy Options
4. In the "Internet Free/Busy" section, paste the "Search location" URL into the corresponding box

Integrating With MS Outlook

Sugar allows you to sync meetings and calls in Sugar with your local installation of Microsoft Outlook using the Outlook Plug-in. The plug-in also allows you to archive [emails](#) and sync [contacts](#) . All meetings and calls, including recurring ones, can be synced using the plug-in. When a meeting or call is synced from Outlook to Sugar, the meeting or call will show on the Sugar calendar, but not be [editable](#) through Sugar; just [viewable](#).

For more information on using the Outlook Plug-in, please review the [Sugar Plug-in for MS Outlook User Guide](#).

Integrating With IBM Lotus Notes

Sugar allows you to sync activities in Sugar with your local installation of Lotus Notes using the Lotus Notes Plug-in. The plug-in also allows you to archive [emails](#) and sync [contacts](#) . All activities, including recurring ones, can be synced using the plug-in. When a meeting or call is synced from Lotus Notes to Sugar, the activity will show on the Sugar calendar, but not be [editable](#) through Sugar; just [viewable](#).

For more information on using the Lotus Notes Plug-in, please review the [Sugar Plug-in for Lotus Notes User Guide](#).

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Calls

Overview

Sugar's Calls module consists of open, upcoming, or closed call records logged by users in your organization. There are various ways you can create calls in Sugar such as via the Calls module, Calendar module, importing calls, etc. Users can also log calls via the Activities subpanel on related module records (e.g. Contacts, Accounts, Leads, etc.), which automatically creates a relationship between both records. Once the call record is created, you can view and edit information pertaining to the call via the Calls detail view. This documentation will cover how to use the Calls module as well as the various actions and options available from within the module.

Call Fields

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

Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the [Studio](#) documentation in the Administration guide.

Field	Description
Assigned To	The Sugar user assigned to the call
Created By	The Sugar user who created the call
Date Created	The date the call record was created
Date Modified	The date the call record was last modified
Description	A description or other information about the call
Direction	Indication of whether the call is inbound or outbound
Duration	The duration of the call specified in hours/minutes
End Date	The end date and time for the call
Modified By Name	The name of user who last modified the call record
Outlook ID	The Outlook appointment item ID when the Sugar Plug-in for Microsoft Outlook syncs an Outlook appointment
Related To	The related module record associated to the call
Reminders	Set a reminder (Popup and Email) alert for invitees Note: Popup notifications appear for all invitees using Sugar and email reminders are sent to all invitees.
Start Date & Time	The start date and time for the scheduled call
Status	The current status (e.g. Planned, Held, Not Held) of the call
Subject	The subject of the scheduled call
Teams	The Sugar team(s) assigned to the call record

Calls Module Tab

The Calls module tab is typically located under the More tab of the navigation bar at the top of any Sugar screen. Sugar normally displays the top six modules shown in the Display Modules list of your user preferences, so the remaining displayed modules are grouped under the More tab. For more information on displayed modules for the navigation bar, please refer to the Layout Options section of the Getting Started documentation. Click the tab to access the Calls list view. You may also hover on the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The

The Actions menu allows you to perform the following operations:

Menu Item	Description
Log Call	Opens the edit view layout to create a new call
View Calls	Opens the list view layout to search and display calls
Import Calls	Opens the import wizard to create or update calls using external data

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

- The top navigation bar may be filtered based on a specific tab grouping (e.g. Sales, Reports, etc.) of which the Calls module is not a member. Click the More tab (last tab on navigation bar) then hover on "Filter Menu By" to check how the navigation bar is grouped. For more information on tab grouping, please refer to the User Interface documentation.
- The Calls module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Calls module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Calls module for your entire Sugar

instance. Reach out to your Sugar administrator to have the Calls module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the [Developer Tools](#) documentation in the Administration guide.

Creating Calls

There are various methods for creating calls in Sugar including via the Calls module, Calendar module, quick create, duplication, and importing calls. The full edit view layout opens when creating the call directly from the Calls menu and includes all of the relevant fields for your organization's calls. The quick create form is a shortened version of the calls edit view and typically contains fewer fields. When using quick create to make a call while viewing an existing record of another module, Sugar automatically creates a relationship between both records. For example, if you are viewing a contact record (e.g. John Smith) and create a new call via the quick create form, the Related to field in the call record will automatically populate with "John Smith", thus creating the relationship. Both the Edit View and Quick Create layouts can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#) documentation in the Administration guide.

Creating Via Calls Module

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

1. Hover on the Calls module and select "Log Call".

2. Enter appropriate values for the [fields](#) in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
3. To set a reminder for invitees, mark the checkboxes (Popup, Email all invitees) in the Reminders field then select the time of the alert (e.g. 10 minutes prior) to occur prior to the call's scheduled start date and time.
    - Please note that if you set a default reminder in your user preferences, the Reminders field in the calls edit view will automatically be selected along with your default reminder time. For more information on setting your default reminder, please refer to the [User Settings](#) section of the

Getting Started documentation.

- The outbound mail server must also be configured via Admin > Email Settings in order for email reminders to be sent out. For more information on setting up the system email settings, please refer to the documentation in the Administration guide.

4. To add invitees (i.e. Contacts, Leads, and Users) to the call, scroll to the Add Invitees panel to search and add an attendee.
   - For more information on adding attendees via the Add Invitees panel, please refer to the Adding Via Add Invitees section of this documentation.

5. To create and add an invitee, scroll to the Create an Invitee section then click either the As Contact or As Lead button.
   - For more information on creating and adding attendees via the Create an Invitee section, please refer to the Adding Via Create an Invitee section of this documentation.

6. The list of all invitees will appear in the Scheduling panel.
   - The duration of the call will be indicated by a green line (start time) and red line (end time).
   - The Scheduling panel will display any busy times (e.g. Calls already scheduled) by blocking it out in blue, and any scheduling conflicts with other calls will be blocked out in brown.

7. Once all the appropriate information is entered, click "Save" or "Save & Send Invites".

- Save : Saves the call record but does not send an email invite to invitees.
- Save & Send Invites : Saves the call record and sends an email invite to invitees. The invitees will be able to accept, tentatively accept, or decline the scheduled call via the email invite.
- Close and Create New : Closes the original call record as "Held" and creates a new copy of the call. For more information on closing and creating new calls, please refer to the Closing and Creating New Call section of this documentation.

Creating Via Calendar

There are two methods of creating calls in the Calendar module. The first method is to create a call via the Schedule Call option in the Calendar module tab. This will open up the Calls edit view layout to create a new call record. For more information on creating calls via the Calls module, please refer to the Creating Via Calls Module section of this documentation. The second method is to create the call directly via the user's Sugar calendar.

Use the following steps to create a call via the Calendar module:

1. Click the Calendar module tab.
2. On the calendar view, click the cell corresponding to the date and time you wish to schedule the call.
   - You can choose to view the calendar by Day, Week, Month, Year, or Shared. For more information on viewing the shared calendar, please refer to the Calendar documentation.

3. Enter appropriate values for the fields on the Details tab of the quick create

form. All required fields are marked with a red asterisk and must be completed prior to saving.

- Please note that the "Start Date & Time" will automatically be populated based on the date and time cell you select in the calendar.

4. If additional fields are desired, click the Full Form button to use the Calls edit view instead.
5. To add invitees (e.g. Contacts, Leads, etc.) to the call, click the Invitees tab. For more information on adding invitees to calls, please refer to the Adding Invitees to Calls section of this documentation.
6. To schedule the call as recurring, click the Recurrence tab, and select the appropriate interval (e.g. Daily, Weekly, etc.).
   - When you select an interval, you must specify how often the scheduled call will recur as well as when the last call takes place. For more information on scheduling recurring calls, please refer to the Setting Meetings and Calls to Recur section of the Calendar documentation.

7. Once all the appropriate information is entered, click "Save" or "Save & Send Invites".
   - Save : Saves the call record but does not send an email invite to invitees.
   - Save & Send Invites : Saves the call record and sends an email invite to invitees. The invitees will be able to accept, tentatively accept, or decline the scheduled call via the email invite.

Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also quick create a call from any Activities subpanel on related module records.

Use the following steps to create a call via Quick Create:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Log Call" or select "Log Call" from the Actions menu of any Activities subpanel on a related module's detail view.
   From Quick Create menu:

   From subpanel:

2. Enter appropriate values in the [fields](#) in the quick create form. All required fields are marked with a red asterisk and must be completed prior to saving.
3. The Related To field is automatically populated with the module and record you are currently viewing.

Note: When creating from the Contacts module, the contact will be populated in the Contacts relationship and the account assigned to the contact will be populated in the Related To.

4. If additional fields or options (e.g. add invitees) are desired, click the Full Form button to use edit view instead.
   - For more information on adding invitees to calls, please refer to the [Adding Invitees to Calls](#) section of this documentation.
5. Once the necessary information is entered, click "Save".

Creating Via Duplication

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

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

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

3. The displayed edit view is pre-populated with the original call's values. Update the necessary fields, then click "Save" or "Save & Send Invites".
   - Please note that the original invitees will also be included in the duplicated call record. You can remove the invitees from the Scheduling panel by clicking the Remove icon on the far right of the invitee names.

For more information on adding invitees to calls, please refer to the [Adding Invitees to Calls](#) section of this documentation.

Importing Calls

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

Use the following steps to import calls via the Import Calls option:

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

2. In Step 1, select the import file and choose "Create new records only". Click "Next".
3. In Step 2, confirm the import file properties. Click "Next".
4. In Step 3, confirm the field mappings for the import. Click "Next".
5. In Step 5, view the import results.
   - The Created Records tab will show all of the new call records.
   - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
   - The Errors tab will show records that were not imported due to errors detected during import.

Viewing Calls

There are various options available for viewing call records in Sugar including via Calls list view, Calls detail view, Calls Recently Viewed menu, Calendar module, dashlets, and reports. Please note that you will only be able to see call records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role](#)
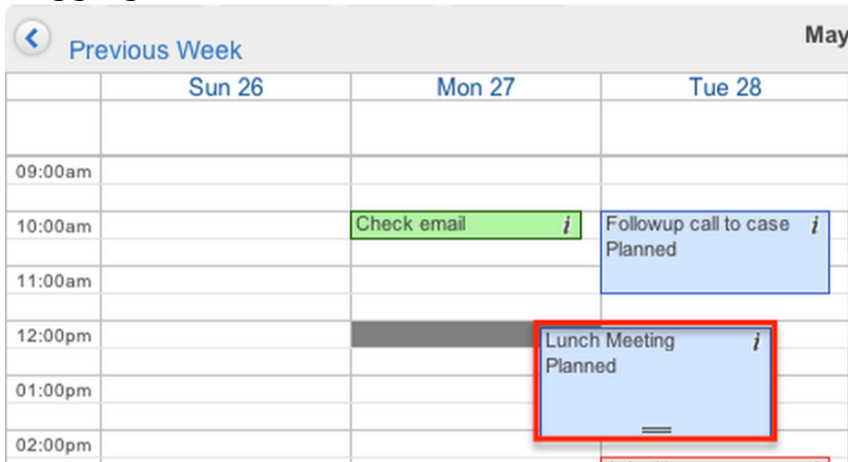
Management documentation in the Administration guide.

Viewing Via List View

The Calls list view displays all call records meeting the current search criteria. To access the list view, simply click the Calls module tab. While list view shows key call fields, you can click the call's name to open the record in detail view. For more information on viewing calls via list view, please refer to the Calls List View section of this documentation.

Viewing Via Detail View

The Calls detail view displays thorough call information including all call fields followed by subpanels of the call's related records belonging to various modules. The detail view can be reached by clicking a call record's link from anywhere in the application including from the Calls list view. For more information on viewing calls via detail view, please refer to the Calls Detail View section of this documentation.

Viewing Via Recently Viewed

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

Viewing Via Calendar

The Calendar module allows users to schedule, view, and manage various activities (Calls, Meetings, Tasks) in Sugar. Call records are displayed in red on the calendar and you can click the corresponding cell to view the call details via the Quick Create form. You can also click the "i" icon to the far right of the call record cell for a quick view of additional details (e.g. Subject, Start Date & Time, Duration, Related to, etc.) of the call without opening up the record. For more information on viewing and managing calls on the calendar, please refer to the Calendar

documentation. Users also have the ability to view other users scheduled activities via the shared calendar option. For more information on viewing the shared calendar, please refer to the Calendar documentation.

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

Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets which allow users to get a quick view of various records, activities, reports, etc. You can view call information in call-based dashlets such as "My Calls" as well as in dashlets based on other modules such as "My Notes". Clicking a call's name from any dashlet will open the call in detail view. For more information on using dashlets and viewing call records via dashlets, please refer to the Modules section of the Home documentation. You can also accept, tentatively accept, or decline the call in the My Calls dashlet, as well as close the call as held by clicking the "x" icon to the far left of each list view row. For more information on closing calls as held, please refer to the Closing Calls section of this documentation.

Please note that when viewing the Calls dashlet, the start date will be shown in one of three colors: black, orange, or red. Start dates change color on the calls list view to allow the user to quickly see which scheduled calls are past their due date/time, regardless of the current status.

The date colors in the Calls dashlet are as follows:

- Black : The start date has not passed yet.
- Orange : The start date and time is within 2 hours of the current time.
- Red : The start date is expired.

Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding calls and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the call record's detail view by clicking the call's name in the report results. Please note that you can only directly access call detail views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the [Reports](#) documentation.

Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the [Role Management](#)documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

Searching Calls

The Calls list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Calls list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note

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

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

Basic Search

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

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

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Items : Select this box to return only records assigned to you.
- My Favorites : Select this box to return only records you have marked as favorites.
- Open Items : Select this box to return only records with an open status (e.g. Planned).

Search Calls

| Subject | My Items ☐ My Favorites ☐ Open Items ☐ | Search | Clear | **Advanced Search** |

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

Administrators can configure what fields appear on the Calls Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Advanced Search

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

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

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

When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select "My Favorites" and enter in a call subject to search, Sugar will only return call records with a matching subject that you have marked as favorites. When searching by a multiselect or dropdown field (e.g. "Assigned to"), however, Sugar will return records matching any of these selections. Once the search completes, the relevant

results will populate in the [list view](#) below the search panel. To see all call records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see call records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide.

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

Global Search

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

To use global search, you need to first enter the keyword into the search box. With Full Text Search enabled, pop-up results will begin appearing once you input three or more characters. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. When Full Text Search is not enabled, results starting with your keyword will appear after clicking the magnifying glass icon or hitting your Return/Enter key. For more information on using and configuring Global Search, please refer to the [Global Search](#) section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results. For more information on configuring your Global Search, please refer to the [Search](#) documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the [Field Options](#) section of the Studio documentation as well as the [Search](#) section of the System documentation in the Administration guide.

Calls List View

The Calls list view displays all call records meeting the current search criteria and

to which your user has access. You can view the basic details of each call within the field columns. Please note that you will only be able to see call records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide.

When viewing the Calls list view, the start date will be shown in one of three colors: black, orange, or red. Start dates change color on the calls list view to allow the user to quickly see which scheduled calls are past their due date/time, regardless of the current status.

The date colors in the Calls list view are as follows:

- Black : The start date has not passed yet.
- Orange : The start date and time is within 2 hours of the current time.
- Red : The start date is expired.

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

Pagination

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

By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more

information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.

Checkbox Selection

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

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

Actions Menu

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

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

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

Favorite Designation

Users have the option to mark call records as favorites via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Calls module tab. In the Calls list view, the star on the left of each call's row is yellow once marked to indicate a favorite call. For more information on how to mark records as favorites, please refer to the Favoriting Calls section of this documentation.

More Information

Additional details for each call can be viewed by clicking the "i" icon to the far right of each list view row. This provides users a quick view of additional call information in addition to what appears in the display column fields. The resulting pop-up window will show the Start Date & Time, Duration, and Related to fields by default. The list of fields appearing here may only be configured through a code-level customization.

Closing Calls

Users have the option to close calls as held via the list view once it has taken place by clicking the "x" icon to the far left of each list view row. Once the call is closed, the "x" icon will no longer appear under the Close column of the list view and the

status of the call will change to "Held". For more information on closing calls to mark as "Held", please refer to the Closing Callssection of this documentation.

Column Sorting

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

Calls Detail View

The Calls detail view displays thorough call information including all call fields which are grouped by default into the Overview and Other panels. You can also view the invitees (i.e. Contacts, Leads, Users) for the call which appear in subpanels beneath the call fields. The detail view can be reached by clicking a call record's link from anywhere in the application including from the Calls list view.

Please note that you will only be able to view a call record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Actions Menu

The Actions menu on the top left of each call's detail view allows you to perform various actions on the current record. Administrator users can change the action

items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the [System](#) documentation in the Administration guide.

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

Menu Item	Description
[Edit](#)	Edit this call
[Duplicate](#)	Duplicate this call
[Delete](#)	Delete this call
[Close and Create New](#)	Close this call as "Held" and create a new copy of the call Note: The Close and Create New button appears as long as the status does not equal "Held".
[Close](#)	Close this call as "Held" Note: The Close button appears as long as the status does not equal "Held".

Favorite Designation

Users have the option to mark call records as a favorite via the detail view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Calls module tab. In the Calls detail view, the star on the right of the call's name is yellow once marked to indicate a favorite call. For more information on how to mark records as favorites, please refer to the [Favoriting Calls](#) section of this documentation.

Next or Previous Record

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

Subpanels

Beneath a call record's fields are subpanels containing invitees to the call as well as related records from the Notes module.

Related Record Subpanels

Modules in Sugar display subpanels, which allow users to view related records from other modules. Users can view the details of the related record as well as relate new or existing records via the subpanel. Administrators can easily modify the fields (e.g. Name, Assigned User, etc.) displayed on subpanels as well as the label of each subpanel through Admin > Studio so that users have visibility to the most important fields for their organization. For more information on working with related record subpanels, please refer to the Subpanels section of the User Interface documentation.

For the Calls module, you can relate a new note record by clicking "Create Note or Attachment" from the Notes subpanel. Complete the Quick Create form then click

"Save" and the note record will appear in the Notes subpanel. Ifadditional fields are desired, click the Full Form button to use the Notes edit view instead. You can edit the note, as well as view the note's detail view by clicking the Pencil/Note icon to the left of the subject. To delete the call's relationship to the note, choose "Unlink" from the dropdown on the far right of the record's row. Please note that this removes the relationship, but does not delete the record itself. The subpanel can also be collapsed or expanded by clicking the double arrow to the left of the subpanel's name.

Invitees Subpanels

The Contacts, Users, and Leads subpanels in the Calls detail view display all invitees for the call. Normally the contact or lead record you select in the Related to field on the Calls edit view will appear in one of these subpanels (i.e. Contacts or Leads). Additional attendees (i.e. Contacts, Leads, Users) can be added to the call via the Add Invitees or Create an Invitee option in the Calls edit view. For more information on adding invitees, please refer to the Adding Invitees to Calls section of this documentation. Once added, all the invit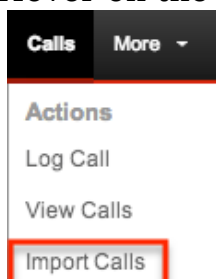ees will appear in their respective subpanels in the Calls detail view as well as the Scheduling panel in the edit view.

The Accept Status field on the subpanel will be updated once the invitee's accept, tentatively accept, or decline the scheduled call via the email invite or dashlet (For Sugar users) . You can edit the record's in the subpanel by clicking "Edit" on the far right of the record's row. You can also remove attendee's from the call by choosing "Unlink" from the dropdown on the far right of the record's row or clicking the Remove icon ("-") in the Scheduling panel. Once removed from the Invitees subpanel, the contact, lead, or user will no longer appear in the Scheduling panel and vice versa. Also, if you select a different contact or lead to relate the call to in the Related to field, the original contact or lead you selected will remain as an attendee in the Invitees subpanel and Scheduling panel. Please note that if you remove the contact or lead as an attendee, then the call will no longer appear in the Activities subpanel of the record's detail view as the relationship is removed.

Editing Calls

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

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

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

Administrators in Sugar may configure both the Calls edit view and quick create via Admin > Studio. For more information on configuring layouts, please refer to

the Studio documentation in the Administration guide.

Editing Via Detail View

You can edit calls via the detail view by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields and panels (e.g. Scheduling, Add Invitees, etc.), then click "Save" to preserve the changes made. To send a new invite to the attendees (if applicable), please click "Save & Send Invites".

Follow up call ☆

Edit ▾

⌃ Overview
Subject: Follow up call
Start Date & Time: 03/25/2013 08:30

Editing Via List View

You can edit calls via the list view by clicking the Pencil icon to the left of each call's name. A pop-up window will open with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. I f additional fields or panels (e.g. Scheduling, Add Invitees, etc.) need to be updated,click the Full Form button to use edit view instead.

Close	Direction ⇕	Subject ⇕	Contact ⇕
✎ ✖	Outbound	**Call to review contract agreement**	Darcy Alex

Editing Via Dashlets

You can edit calls by clicking the pencil icon to the far right of any calls-based dashlet on your Sugar home page. For example, clicking the pencil icon within the My Calls dashlet will open a pop-up window with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. If additional fields or panels (e.g. Scheduling, Add Invitees, etc.) need to be updated, click the Full Form button to use edit view instead. For more information on dashlets, please refer to the Home documentation.

Editing Via Reports

Sugar reports also allow you to edit a call record by clicking on the pencil icon next to a call's name. This opens a pop-up window with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. I f additional fields or panels (e.g. Scheduling, Add Invitees, etc.) need to be updated,click the Full Form button to use edit view instead.

Please note that you may only directly edit calls from Rows and Columns-type or Summation with Details-type reports as Summation-type and Matrix-type reports do not include the pencil icon. For more information on reports, please refer to the Reports documentation.

Deleting Calls

If a call record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Calls detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting call records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

Please note that your ability to delete calls in Sugar may be restricted by a role.

For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

Deleting Via Detail View

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

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

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

Mass Deleting Via List View

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

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

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

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

Adding Invitees to Calls

Users have the option of adding additional invitees (i.e. Contacts, Leads, Users) to calls via the Add Invitees or Create an Invitee option in the Calls edit view. Please note that the user creating the call as well as the contact or lead selected in the Related to field will automatically be added as invitees to the call. You can simply remove yourself or an attendee from the call by choosing "Remove" from either the Invitees subpanel or the Scheduling panel. For more information on removing invitees, please refer to the Invitees Subpanels section of this documentation.

Adding Via Add Invitees

Use the following steps to add attendees via the Add Invitees panel:

1. Navigate to a call record's edit view.
2. Scroll to the Add Invitees panel and perform a search to find the attendee you wish to add.
   - The search results will appear below the Add Invitees panel.

3. To add the invitee, click "Add" to the far right of the record's name.
   - Please note that the icons to the left of the record's name indicate if it is a Contact (Rolodex Card icon), Lead (Magnifying Glass icon), or User (People icon) record.

The added invitee(s) will appear in the Scheduling panel in the Calls edit view as well as the Invitees subpanel in the detail view. For more information on viewing attendees via the Invitees subpanels, please refer to the Invitees Subpanels section of this documentation.

Adding Via Create an Invitee

Use the following steps to add attendees via the Create an Invitee option:

1. Navigate to a call record's edit view.
2. Scroll to the Create an Invitee section and click either the As Contact or As Lead button.

3. Enter in the relevant information (e.g. First Name, Last Name, etc.) for the contact or lead then click "Create & Add".
   - Please note that the created contact or lead record will be added and appear in the corresponding module (Contact or Lead) as well.

The contact or lead will appear as an invitee in the Scheduling panel in the Calls edit view as well as the Invitees subpanel in the detail view. For more information on viewing attendees via the Invitees subpanels, please refer to the Invitees Subpanels section of this documentation.

Closing Calls

Once a call has taken place or is complete, users will change the status of the call to "Held" on the edit view. Outside of the Calls edit view, Sugar provides users with alternative options to close calls as "Held" via the Calls list view or detail view. Please note that the Close option will only appear on the list view or detail view if the call currently has any status besides "Held".

Closing Via List View

Use the following steps to close a call record via the list view:

1. Navigate to a call record's list view.
2. Use the [Basic](#) or [Advanced Search](#) to find the Call record(s) you wish to close
   .
3. Click the "x" icon to the far left of each call's list view row.

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

Once the call is closed, the "x" icon will no longer appear under the Close column and the status of the call record will change to "Held".

Please note that open or upcoming calls appear in the Activities subpanel of the invitees record (e.g. Contacts, Leads), but once a call is marked as held, the call will instead appear in the History subpanel.

Closing Via Detail View

Use the following steps to close a call record via the detail view:

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

Once the call is closed, the status of the call record will change to "Held" and the Close option will no longer appear in the Actions menu.

Closing and Creating New Call

The Close and Create New option in the Calls edit and detail view allows you to close the current call record as "Held" and create a new copy of the call. The displayed edit view is pre-populated with the original call's values except for the status, which will display "Planned" by default. This option may be useful if you are logging a call that has already taken place and need to create a new call record for the same contact, lead, etc. using similar information. Please note that the Close and Create Newoption will only appear if the call currently has a status that does not equal "Held".

From Edit View:

From Detail View:

Exporting Calls

Sugar's Export option allows users to download all fields for the selected calls to

their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Call data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered calls back into Sugar. For more information on updating existing records via import, please refer to the [Import](#) documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of call records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

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

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

Mass Updating Calls

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

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

the Mass Update option.

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

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

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

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

Favoriting Calls

Each Sugar user has the option to designate their own favorite calls which are important or will be viewed often so that they can easily be accessed via search or from the Calls module tab. Once records are marked as favorites, use the My Favorites checkbox in the Calls [Basic](#)or [Advanced Search](#)to retrieve your favorites or select from your most recent favorites directly from the [Calls module tab](#) .

Favoriting Via List View

Use the following steps to mark records as favorites via the Calls list view:

1. Navigate to the Calls list view by clicking the Calls module tab.
2. Use the [Basic](#)or [Advanced Search](#) to find the Call records you wish to mark as favorites.
3. Mark the star icon on the left of each desired call's row.
4. To remove the call as a favorite, click the star again to revert it to white.

Favoriting Via Detail View

Use the following steps to mark records as favorites via the Calls detail view:

1. Navigate to a call record's detail view.
2. Click the star icon to the right of the call's name in the upper left of the detail view to designate it as a favorite.
3. To remove the call as a favorite, click the star again to revert it to white.

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

Meetings

Overview

Sugar's Meetings module consists of open, upcoming, or closed meeting records logged by users in your organization. There are various ways you can create

meetings in Sugar such as via the Meetings module, Calendar module, importing meetings, etc. Users can also schedule meetings via the Activities subpanel on related module records (e.g. Contacts, Accounts, Leads, etc.), which automatically creates a relationship between both records. Once the meeting record is created, you can view and edit information pertaining to the meeting via the Meetings detail view. This documentation will cover how to use the Meetings module as well as the various actions and options available from within the module.

Meeting Fields

The Meetings module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

Field	Description
Assigned To	The Sugar user assigned to the meeting
Created By	The Sugar user who created the meeting
Date Created	The date the meeting record was created
Date Modified	The date the meeting record was last modified
Description	A description or other information about the meeting
Display URL	The URL to access the meeting hosted by an external application (e.g. WebEx, GoToMeeting, etc.) Note: This is a dependent field, which will appear when a value other than "Sugar" is selected as the meeting type.
Duration	The duration (e.g. 30 minutes, 1 hour, 1 day, etc.) of the meeting
End Date	The end date and time of the meeting
Location	The meeting location
Meeting Password	The password to access the meeting via WebEx, GoToMeeting, etc.

	Note: This is a dependent field, which will appear when a value other than "Sugar" is selected as the meeting type.
Meeting Type	The application (e.g. Sugar, WebEx, GoToMeeting, etc.) hosting the meeting Note: External meeting accounts (e.g. WebEx, GoToMeeting) are added to the Meeting Type field when users connect to their account via the External Accounts tab in their user preferences. For more information on connecting to external applications, please refer to the [External Accounts Tab](#) section in the Getting Started documentation.
Meeting Update Sequence	Meeting update sequence for meetings as per iCalendar standards
Modified By Name	The name of the Sugar user who last modified the meeting record
Outlook ID	The Outlook appointment item ID when the Sugar Plug-in for Microsoft Outlook syncs an Outlook appointment
Related To	The related module record associated to the meeting
Reminders	Set a meeting reminder (Popup and Email) alert for invitees Note: Popup notifications appear for all invitees using Sugar and email reminders are sent to all invitees.
Start Date	The start date and time for the scheduled meeting
Status	The current status (e.g. Planned, Held, Not Held) of the meeting
Subject	The subject of the scheduled meeting
Teams	The Sugar team(s) assigned to the meeting record

Meetings Module Tab

The Meetings module tab is typically located under the More tab on the navigation

bar at the top of any Sugar screen. Sugar normally displays the top six modules shown in the Display Modules list of your user preferences, so the remaining displayed modules are grouped under the More tab. For more information on displayed modules for the navigation bar, please refer to the Layout Options section of the Getting Started documentation.Click the tab to access the Meetings list view. You may also hover on the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of meetings you last viewed in the module. The Favorites menu displays the list of meetings you most recently marked as favorites in the module.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Schedule Meeting	Opens the edit view layout to create a new meeting
View Meetings	Opens the list view layout to search and display meetings
Import Meetings	Opens the import wizard to create or update meetings using external data

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

- The top navigation bar may be filtered based on a specific tab grouping (e.g. Sales, Reports, etc.) of which the Meetings module is not a member. Click the More tab (last tab on navigation bar) then hover on "Filter Menu By" to check how the navigation bar is grouped. For more information on tab grouping, please refer to the User Interface documentation.
- The Meetings module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Meetings module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Meetings module for your entire Sugar instance. Reach out to your Sugar administrator to have the Meetings module displayed. For more information on displaying and hiding modules

throughout Sugar, please refer to the [Developer Tools](#) documentation in the Administration guide.

Creating Meetings

There are various methods for creating meetings in Sugar including via the Meetings module, Calendar module, quick create, duplication, and importing meetings. The full edit view layout opens when creating the meeting directly from the Meetings menu and includes all of the relevant fields for your organization's meetings. The quick create form is a shortened version of the meetings edit view and typically contains fewer fields. When using quick create to make a meeting while viewing an existing record of another module, Sugar automatically creates a relationship between both records. For example, if you are viewing a contact record (e.g. John Smith) and create a new meeting via the quick create form, the Related to field in the meeting record will automatically populate with "John Smith", thus creating the relationship. Both the Edit View and Quick Create layouts can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#) documentation in the Administration guide.

Creating Via Meetings Module

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

1. Hover on the Meetings module and select "Schedule Meeting".

2. Enter appropriate values for the [fields](#) in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
3. To set a reminder for invitees, mark the checkboxes (Popup, Email all invitees) in the Reminders field then select the time of the alert (e.g. 10 minutes prior) to occur prior to the meeting's start date and time.
   - Please note that if you set a default reminder in your user preferences, the Reminders field in the meetings edit view will automatically be selected along with your default reminder time. For more information on setting your default reminder, please refer to the [User Settings](#)section of the Getting Started documentation.

- The outbound mail server must also be configured via Admin > Email Settings in order for email reminders to be sent out. For more information on setting up the system email settings, please refer to the documentation in the Administration guide.

4. To add invitees (i.e. Contacts, Leads, and Users) to the meeting, scroll to the Add Invitees panel to search and add an attendee.
   - For more information on adding attendees via the Add Invitees panel, please refer to the Adding Via Add Invitees section of this documentation.

5. To create and add an invitee, scroll to the Create an Invitee section then click either the As Contact or As Lead button.
   - For more information on creating and adding attendees via the Create an Invitee section, please refer to the Adding Via Create an Inviteesection of this documentation.

6. The list of all invitees will appear in the Scheduling panel.
   - The duration of the meeting will be indicated by a green line (start time) and red line (end time).
   - The Scheduling panel will display any busy times (e.g. Meetings already scheduled) by blocking it out in blue, and any scheduling conflicts with other meetings will be blocked out in brown.

7. Once all the appropriate information is entered, click "Save" or "Save & Send Invites".
   - Save : Saves the meeting record but does not send an email invite to

invitees.

- Save & Send Invites : Saves the meeting record and sends an email invite to invitees. The invitees will be able to accept, tentatively accept, or decline the scheduled meeting via the email invite.
- Close and Create New : Closes the original meeting record as "Held" and creates a new copy of the meeting. For more information on closing and creating new meetings, please refer to the Closing and Creating New Meeting section of this documentation.

Create

| Save | Cancel | Save & Send Invites | Close and Create New |

⌃ Overview

Subject: * Contract Renewal

Meeting Type: Sugar ⬍

Creating Via Calendar

There are two methods of creating meetings in the Calendar module. The first method is to create a meeting via the Schedule Meeting option in the Calendar module tab. This will open up the Meetings edit view layout to create a new meeting record. For more information on creating meetings via the Meetings module, please refer to the Creating Via Meetings Module section of this documentation. The second method is to create the meeting directly via the user's Sugar calendar.

Use the following steps to create a meeting via the Calendar module:

1. Click the Calendar module tab.
2. On the calendar view, click the cell corresponding to the date and time you wish to schedule the meeting.
   - You can choose to view the calendar by Day, Week, Month, Year, or Shared. For more information on viewing the shared calendar, please refer to the Calendar documentation.

Calendar

| Day | Week | Month | Year | Shared |

◁ Previous Week   March 24 2013 - March 30 2013

	Sun 24	Mon 25	Tue 26	Wed 27
08:00am				
		08:30am Follow *i*		
09:00am				
10:00am				

3. Enter appropriate values for the [fields](#) on the Details tab of the quick create form. All required fields are marked with a red asterisk and must be completed prior to saving.
   ○ Please note that the "Start Date" will automatically be populated based on the date and time cell you select in the calendar.

4. If additional fields are desired, click the Full Form button to use the Meetings edit view instead.
5. To add invitees (i.e. Contacts, Leads, and Users) to the meeting, click the Invitees tab. For more information on adding invitees to meetings, please refer to the [Adding Invitees to Meetings](#)section of this documentation.
6. Toschedule the meeting as recurring, click the Recurrence tab, and select the appropriate interval (e.g. Daily, Weekly, etc.).
   ○ When you select an interval, you must specify how often the scheduled meeting will recur as well as when the last meeting takes place. For more information on scheduling recurring meetings, please refer to the section of the Calendar documentation.

7. Once all the appropriate information is entered, click "Save" or "Save & Send Invites".
   ○ Save : Saves the meeting record but does not send an email invite to invitees.
   ○ Save & Send Invites : Saves the meeting record and sends an email invite to invitees. The invitees will be able to accept, tentatively accept, or decline the scheduled meeting via the email invite.

Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also quick create a meeting from any Activities subpanel on related module records.

Use the following steps to create a meeting via Quick Create:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Schedule Meeting" or select "Schedule Meeting" from the Actions menu of any Activities subpanel on a related module's detail view.
   From Quick Create menu:

   From subpanel:

2. Enter appropriate values in the [fields](#) in the quick create form. All required fields are marked with a red asterisk and must be completed prior to saving.
3. The Related To field is automatically populated with the module and record you are currently viewing.

Note : When creating from the Contacts module, the contact will be populated in the Contacts relationship and the account assigned to the contact will be populated in the Related To.

4. If additional fields or options (e.g. add invitees) are desired, click the Full Form button to use edit view instead.
   - For more information on adding invitees to meetings, please refer to the
5. Once the necessary information is entered, click "Save".

Creating Via Duplication

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

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

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

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

- Please note that the original invitees will also be included in the duplicated meeting record. You can remove the invitees from the Scheduling panel by clicking the Remove icon on the far right of the invitee names. For more information on adding invitees to meetings, please refer to the [Adding Invitees to Meetings](#)section of this documentation.

Importing Meetings

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

Use the following steps to import meetings via the Import Meetings option:

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

2. In Step 1, select the import file and choose "Create new records only". Click "Next".
3. In Step 2, confirm the import file properties. Click "Next".
4. In Step 3, confirm the field mappings for the import. Click "Next".
5. In Step 5, view the import results.
   - The Created Records tab will show all of the new meeting records.
   - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
   - The Errors tab will show records that were not imported due to errors detected during import.

Viewing Meetings

There are various options available for viewing meeting records in Sugar including

via Meetings list view, Meetings detail view, Meetings Recently Viewed menu, Calendar module, dashlets, and reports. Please note that you will only be able to see meeting records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

Viewing Via List View

The Meetings list view displays all meeting records meeting the current search criteria. To access the list view, simply click the Meetings module tab. While list view shows key meeting fields, you can click the meeting's name to open the record in detail view. For more information on viewing meetings via list view, please refer to the Meetings List Viewsection of this documentation.

Viewing Via Detail View

The Meetings detail view displays thorough meeting information including all meeting fields followed by subpanels of the meeting's related records belonging to various modules. The detail view can be reached by clicking a meeting record's link from anywhere in the application including from the Meetings list view. For more information on viewing meetings via detail view, please refer to the Meetings Detail View section of this documentation.

Viewing Via Recently Viewed

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

Viewing Via Calendar

The Calendar module allows users to schedule, view, and manage various activities (Calls, Meetings, Tasks) in Sugar. Meeting records are displayed in blue on the calendar and you can click the corresponding cell to view the meeting details via the Quick Create form. You can also click the "i" icon to the far right of the

meeting record cell for a quick view of additional details (e.g. Subject, Start Date & Time, Duration, Related to, etc.) of the meeting without opening up the record. For more information on viewing and managing meetings on the calendar, please refer to the Calendar documentation. Users also have the ability to view other users scheduled activities via the shared calendar option. For more information on viewing the shared calendar, please refer to the Calendardocumentation.

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

Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets which allow users to get a quick view of various records, activities, reports, etc. You can view meeting information in meeting-based dashlets such as "My Meetings" as well as in dashlets based on other modules such as "My Notes". Clicking a meeting's name from any dashlet will open the meeting in detail view. For more information on using dashlets and viewing meeting records via dashlets, please refer to the Modules section of the Home documentation. You can also accept, tentatively accept, or decline the meeting in the My Meetings dashlet, as well as close the meeting as held by clicking the "x" icon to the far left of each list view row. For more information on closing meetings as held, please refer to the Closing Meetings section of this documentation.

Please note that when viewing the Meetings dashlet, the start date will be shown in one of three colors: black, orange, or red. Start dates change color on the meetings list view to allow the user to quickly see which scheduled meetings are past their due date/time, regardless of the current status.

The date colors in the Meetings dashlet are as follows:

- Black : The start date has not passed yet.
- Orange : The start date and time is within 2 hours of the current time.
- Red : The start date is expired.

Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding meetings and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the meeting record's detail view by clicking the meeting's name in the report results. Please note that you can only directly access meeting detail views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation.

Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Role Managementdocumentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.
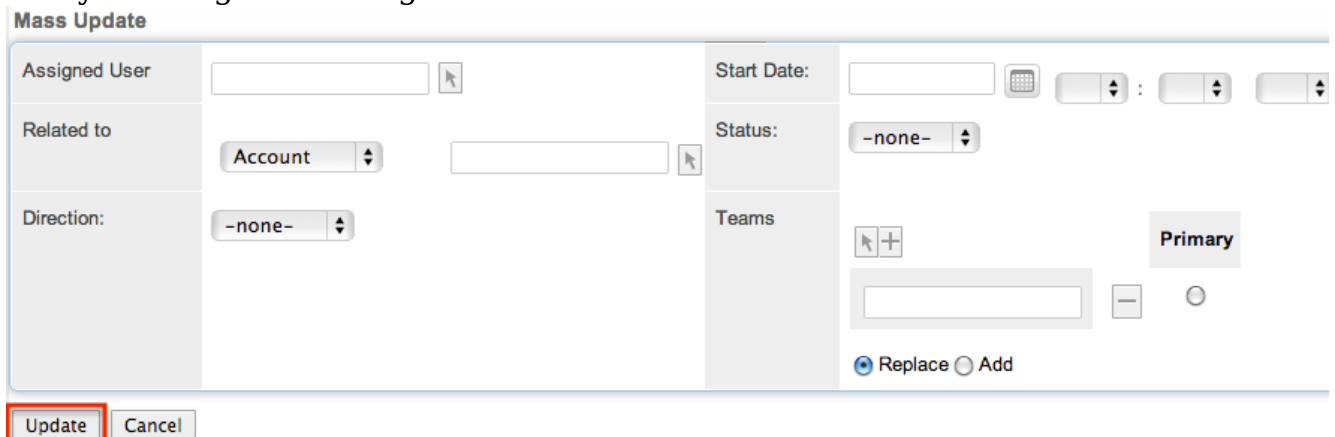
Searching Meetings

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

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

Basic Search

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

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

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Items : Select this box to return only records assigned to you.
- My Favorites : Select this box to return only records you have marked as favorites.
- Open Items : Select this box to return only records with an open status (e.g. Planned).

Search Meetings

| Subject | My Items ☐ My Favorites ☐ Open Items ☐ | Search | Clear | **Advanced Search** |

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Items" and enter a meeting subject, Sugar will only return meeting records with a matching subject that are assigned to you. Once the search is

complete, the relevant results will populate in the list view below the search panel. To see all meeting records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see meeting records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Managementdocumentation in the Administration guide.

Administrators can configure what fields appear on the Meetings Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.
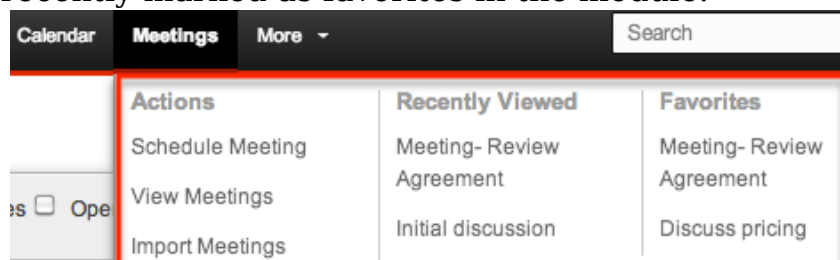
Advanced Search

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

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

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

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

Administrators can configure what fields appear on the Meetings Advanced Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Global Search

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

To use global search, you need to first enter the keyword into the search box. With Full Text Search enabled, pop-up results will begin appearing once you input three or more characters. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. When Full Text Search is not enabled, results starting with your keyword will appear after clicking the magnifying glass icon or hitting your Return/Enter key. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the

section of the System documentation in the Administration guide.

Meetings List View

The Meetings list view displays all meeting records meeting the current search criteria and to which your user has access. You can view the basic details of each meeting within the field columns. Please note that you will only be able to see meeting records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

When viewing the Meetings list view, the start date will be shown in one of three colors: black, orange, or red. Start dates change color on the meetings list view to allow the user to quickly see which scheduled meetings are past their due date/time, regardless of the current status.

The date colors in the Meetings list view are as follows:

- Black : The start date has not passed yet.
- Orange : The start date and time is within 2 hours of the current time.
- Red : The start date is expired.

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

Pagination

List view displays the current search results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. To the right just below the search panel you can see which records of the total results set are

currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of your current results.

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

Checkbox Selection

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

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

Actions Menu

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

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

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

Favorite Designation

Users have the option to mark meeting records as favorites via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Meetings module tab. In the Meetings list view, the star on the left of each meeting's row is yellow once marked to indicate a favorite meeting. For more information on how to mark records as favorites, please refer to the Favoriting Meetings section of this documentation.

More Information

Additional details for each meeting can be viewed by clicking the "i" icon to the far right of each list view row. This provides users a quick view of additional meeting information in addition to what appears in the display column fields. The resulting pop-up window will show the Subject, Start Date & Time, Duration, Related to, Status, and Description fields by default. The list of fields appearing here may only be configured through a code-level customization.

Closing Meetings

Users have the option to close meetings as held via the list view once it has taken place by clicking the "x" icon to the far left of each list view row. Once the meeting is closed, the "x" icon will no longer appear under the Close column of the list view and the status of the meeting will change to "Held". For more information on closing meetings to mark as "Held", please refer to the [Closing Meetings](#)section of this documentation.

Column Sorting

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

Meetings Detail View

The Meetings detail view displays thorough meeting information including all meeting fields which are grouped by default into the Overview and Other panels. You can also view the invitees (i.e. Contacts, Leads, Users) for the meeting which appear in subpanels beneath the meeting fields. The detail view can be reached by clicking a meeting record's link from anywhere in the application including from the Meetings list view.

Please note that you will only be able to view a meeting record according to your

team membership, user type, and role restrictions. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Actions Menu

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

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

Menu Item	Description
[Edit](#)	Edit this meeting
[Duplicate](#)	Duplicate this meeting
[Delete](#)	Delete this meeting
[Close and Create New](#)	Close this meeting as "Held" and create a new copy of the meeting Note: The Close and Create New button appears as long as the status does not equal "Held".
[Close](#)	Close this meeting as "Held" Note: The Close button appears as long as the status does not equal "Held".

Favorite Designation

Users have the option to mark meeting records as a favorite via the detail view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Meetings module tab. In the Meetings detail view, the star on the right of the meeting's name is yellow once marked to indicate a favorite meeting. For more information on how to mark records as favorites, please refer to the [Favoriting Meetings](#) section of this documentation.

Next or Previous Record

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

Subpanels

Beneath a meeting record's fields are subpanels containing invitees to the meeting as well as related records from the Notes module.

Related Record Subpanels

Modules in Sugar display subpanels, which allow users to view related records from other modules. Users can view the details of the related record as well as relate new or existing records via the subpanel. Administrators can easily modify the fields (e.g. Name, Assigned User, etc.) displayed on subpanels as well as the label of each subpanel through Admin > Studio so that users have visibility to the

most important fields for their organization. For more information on working with related record subpanels, please refer to the [Subpanels](#) section of the User Interface documentation.

For the Meetings module, you can relate a new note record by clicking "Create Note or Attachment" from the Notes subpanel. Complete the Quick Create form then click "Save" and the note record will appear in the Notes subpanel. If additional fields are desired, click the Full Form button to use the Notes edit view instead. You can edit the note, as well as view the note's detail view by clicking the Pencil/Note icon to the left of the subject. To delete the meeting's relationship to the note, choose "Unlink" from the dropdown on the far right of the record's row. Please note that this removes the relationship, but does not delete the record itself. The subpanel can also be collapsed or expanded by clicking the double arrow to the left of the subpanel's name.

Invitees Subpanels

The Contacts, Users, and Leads subpanels in the Meetings detail view display all invitees for the meeting. Normally the contact or lead record you select in the Related to field on the Meetings edit view will appear in one of these subpanels (i.e. Contacts or Leads). Additional attendees (i.e. Contacts, Leads, Users) can be added to the meeting via the Add Invitees or Create an Invitee option in the Meetings edit view. For more information on adding invitees, please refer to the [Adding Invitees to Meetings](#) section of this documentation. Once added, all the invitees will appear in their respective subpanels in the Meetings detail view as well as the Scheduling panel in the edit view.

The Accept Status field on the subpanel will be updated once the invitee's accept, tentatively accept, or decline the scheduled meeting via the email invite or [dashlet](#) (For Sugar users). You can edit the record's in the subpanel by clicking "Edit" on the far right of the record's row. You can also remove attendee's from the meeting by choosing "Unlink" from the dropdown on the far right of the record's row or clicking the Remove icon ("-") in the Scheduling panel. Once removed from the Invitees subpanel, the contact, lead, or user will no longer appear in the Scheduling panel and vice versa. Also, if you select a different contact or lead to relate the meeting to in the Related to field, the original contact or lead you selected will remain as an attendee in the Invitees subpanel and Scheduling panel. Please note that if you remove the contact or lead as an attendee, then the meeting record will no longer appear in the Activities subpanel of the record's detail view

as the relationship is removed.

Editing Meetings

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

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

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

Administrators in Sugar may configure both the Meetings edit view and quick create via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

Editing Via Detail View

You can edit meetings via the detail view by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fieldsand panels (e.g. Scheduling, Add Invitees, etc.), then click "Save" to preserve the changes made. To send a new invite to the attendees (if applicable), please click "Save & Send Invites".

Editing Via List View

You can edit meetings via the list view by clicking the Pencil icon to the left of each meeting's name. A pop-up window will open with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. If additional fields or panels (e.g. Scheduling, Add Invitees, etc.) need to be updated, click the Full Form button to use edit view instead.

Editing Via Dashlets

You can edit meetings by clicking the pencil icon to the far right of any meetings-based dashlet on your Sugar home page. For example, clicking the pencil icon within the My Meetings dashlet will open a pop-up window with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. If additional fields or panels (e.g. Scheduling, Add Invitees, etc.) need to be updated, click the Full Form button to use edit view instead. For more information on dashlets, please refer to the Home documentation.

Editing Via Reports

Sugar reports also allow you to edit a meeting record by clicking on the pencil icon next to a meeting's name. This opens a pop-up window with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. If additional fields or panels (e.g. Scheduling, Add Invitees, etc.) need to be updated, click the Full Form button to use edit view instead.

Please note that you may only directly edit meetings from Rows and Columns-type or Summation with Details-type reports as Summation-type and Matrix-type reports do not include the pencil icon. For more information on reports, please refer to the [Reports](#)documentation.

Deleting Meetings

If a meeting record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Meetings detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting meeting records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

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

Deleting Via Detail View

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

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

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

Mass Deleting Via List View

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

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

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

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

Adding Invitees to Meetings

Users have the option of adding additional invitees (i.e. Contacts, Leads, Users) to meetings via the Add Invitees or Create an Invitee option in the Meetings edit view. Please note that the user creating the meeting as well as the contact or lead selected in the Related to field will automatically be added as invitees to the meeting. You can simply remove yourself or an attendee from the meeting by choosing "Unlink" f rom the Invitees subpanel or clicking the Remove icon ("-") in the Scheduling panel. For more information on removing invitees, please refer to the Invitees Subpanels section of this documentation.

Adding Via Add Invitees

Use the following steps to add attendees via the Add Invitees panel:

1. Navigate to a meeting record's edit view.

2. Scroll to the Add Invitees panel and perform a search to find the attendee you wish to add.
   - The search results will appear below the Add Invitees panel.

3. To add the invitee, click "Add" to the far right of the record's name.
   - Please note that the icons to the left of the record's name indicate if it is a Contact (Rolodex Card icon), Lead (Magnifying Glass icon), or User (People icon) record.

The added invitee(s) will appear in the Scheduling panel in the Meetings edit view as well as the Invitees subpanel in the detail view. For more information on viewing attendees via the Invitees subpanels, please refer to the Invitees Subpanels section of this documentation.

Adding Via Create an Invitee

Use the following steps to add attendees via the Create an Invitee option:

1. Navigate to a meeting record's edit view.
2. Scroll to the Create an Invitee section and click either the As Contact or As Lead button.

3. Enter in the relevant information (e.g. First Name, Last Name, etc.) for the Contact or Lead then click "Create & Add".

- Please note that the created contact or lead record will be added and appear in the corresponding module (Contact or Lead) as well.

The contact or lead will appear as an invitee in the Scheduling panel in the Meetings edit view as well as the Invitees subpanel in the detail view. For more information on viewing attendees via the Invitees subpanels, please refer to the Invitees Subpanels section of this documentation.

Closing Meetings

Once a meeting has taken place or is complete, users will change the status of the meeting to "Held" on the edit view. Outside of the Meetings edit view, Sugar provides users with alternative options to close meetings as "Held" via the list view or detail view. Please note that the Close option will only appear on the list view or detail view if the meeting currently has a status that does not equal "Held".

Closing Via List View

Use the following steps to close a meeting record via the list view:

1. Navigate to a meeting record's list view.
2. Use the Basic or Advanced Search to find the Meeting record(s) you wish to close.
3. Click the "x" icon to the far left of each meeting's list view row.

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

Once the meeting is closed, the "x" icon will no longer appear under the Close column and the status of the meeting record will change to "Held".

Please note that open or upcoming meetings appear in the Activities subpanel of the invitees record (e.g. Contacts, Leads), but once a meeting is marked as held, the meeting will instead appear in the History subpanel.

Closing Via Detail View

Use the following steps to close a meeting record via the detail view:

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

Once the meeting is closed, the status of the meeting record will change to "Held" and the Close option will no longer appear in the Actions menu.

Closing and Creating New Meeting

The Close and Create New option in the Meetings edit and detail view allows you to close the current meeting record as "Held" and create a new copy of the meeting. The displayed edit view is pre-populated with the original meeting's values except for the status, which will display "Planned" by default. This option may be useful if you are logging a meeting that has already taken place and need to create a new meeting record for the same contact, lead, etc. using similar information. Please note that the Close and Create New option will only appear if the meeting currently has a status that does not equal "Held".

From Edit View:

From Detail View:

Exporting Meetings

Sugar's Export option allows users to download all fields for the selected meetings to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Meeting data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered meetings back into Sugar. For more information on updating existing records via import, please refer to the Import documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of meeting records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

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

Please note that your ability to export meetings from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management

documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

Mass Updating Meetings

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

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

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

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

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

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

Favoriting Meetings

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

Favoriting Via List View

Use the following steps to mark records as favorites via the Meetings list view:

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

Favoriting Via Detail View

Use the following steps to mark records as favorites via the Meetings detail view:

1. Navigate to a meeting record's detail view.
2. Click the star icon to the right of the meeting's name in the upper left of the detail view to designate it as a favorite.
3. To remove the meeting as a favorite, click the star again to revert it to white.

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

Emails

Overview

Sugar's Emails module allows users to receive and send email through the application using their personal email address or a group inbox. Users have the ability to view email through Sugar and also the ability to store email in Sugar. Email stored in Sugar may then relate to other Sugar records such as contacts, cases, accounts, and many others. This documentation will cover how to use the Emails module as well as the various actions and options available from within the module.

Email Fields

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

Field	Description
Assigned To	The Sugar user assigned to the email
Teams	The Sugar team(s) assigned to the email record
Date Sent	The date the email was sent
From	The email address the email was sent from

To	The email address(es) the email was sent to
Cc	The email address(es) the email was copied to
Bcc	The email address(es) the email was blind copied to
Subject	The subject of the email
Body	The content of the email
Attachments	Any attachments included with the email
Related To	The module and record that is related to this email Note : This will decide which module this email will show in the History subpanel

Emails Module Tab

The Emails module tab is typically located under the More tab on the navigation bar at the top of any Sugar screen. Depending on your settings, you may have to click "Show More" in order to see the Emails module tab. Click the tab to access the Emails list view. You may also hover on the tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of emails you last viewed in the module.

The Actions menu allows you to perform the following operations:

Menu Item	Description
View My Email	Opens the list view layout to search and display emails
Create Email Template	Opens the edit view layout to create a new email template
View Email Templates	Opens the list view layout to search and

	display email templates

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

- The top navigation bar may be filtered based on a specific tab grouping (i.e. Activities, Reports, etc.) of which the Emails module is not a member. Click the More tab (last tab on navigation bar) then hover on "Filter Menu By" to check how the navigation bar is grouped. For more information on tab grouping, please refer to the User Interface documentation.
- The Emails module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Emails module in the Hide Modules list, simply move it to the Display Modules list and save. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Emails module for your entire Sugar instance. Reach out to your Sugar administrator to have the Emails module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

Prerequisites

There are several key components that need to be configured to enable sending and viewing personal email in Sugar. Some prerequisites need to be configured by a Sugar administrator and some need to be configured by the end users themselves. Please ensure the following is configured before utilizing the emails module:

- Personal Email Settings : To view and import personal email into Sugar, each user must configure the settings in the Emails module with their personal email account information. For more information on how to configure your personal email settings, please refer to the Configuring Mail Accounts section in this document.
- Outbound Email Settings : To send email through Sugar, users need to have an outgoing email account configured. Administrators have the option to allow the system outgoing email account to send email for the users. For more information on configuring an outbound email account, please refer to the Configuring Outgoing Mail Servers section in this document.
- Group Email Settings : Sugar adminsitrators need to configure any group handling email accounts before users can access them. For more information on setting up a group email account in Sugar, please refer to the Email

documentation in the administration guide.

- Inbound Email Scheduler : The inbound email scheduler needs to be configured and running in order to pull Group email accounts into Sugar. For more information on setting up and configuring the inbound email scheduler, please refer to the [Schedulers](#) documentation in the administration guide.

Settings

Settings in the Emails module enable you to manage how you view and compose emails. Some settings are pre-configured with default values and some settings are optional. You can customize these settings to suit your requirements. The Settings window displays tabs for General settings and for Mail Account settings. To access the Emails module settings, simply click the Settings button towards the top of the page.

Note : Many settings require you to reload the Emails module page before the settings take effect.

General Settings

The General Settings tab displays options to specify the character set, signature, automatic or manual checks for incoming emails, etc. Some of these settings have default values which you can modify. General Settings apply to all your personal mail accounts in Sugar and will not apply to group email accounts.
The options in the General tab have the following functions:

- Check for New Mail : Select a time interval from the dropdown list to check your mail accounts for new email (Manually, Every 5 minutes, Every 15 minutes, etc.). The default setting is to check email manually.
- Send Plain Text Emails Only : Check this box to send emails in plain text format instead of the default HTML format.
- Character Set : Specify the default character set for outbound emails from this dropdown list. The default setting is UTF-8.
- Signatures : Select an existing Signature from the dropdown or select "Create" to create a new signature. The signature selected will appear by default on all outgoing email. Before sending you do have the option to change or remove the signature from the email.
- Signatures Above Reply : Check this box to place your signature above the content of the email to which you are replying to. Alternatively, the signature will appear below the content of the email to which you are replying to.

- Emails Per Page : Select the count of emails to display per page from the dropdown (10,20,50). The default setting is 20.
- Available User Folders : Select the options you wish to display in the Folders panel on the left side of the Emails module. Folders with a period preceding the name are subfolders. For example : ".My Drafts", ."Sent Emails", and ".My Archived Emails" are subfolders of "My Email". When selecting a subfolder the parent folder will automatically be selected as well.

Mail Accounts

The Mail Accounts tab allows users to manage their mail accounts and outbound mail servers.

Configuring Mail Accounts

Sugar allows users to link one or more personal mail accounts to view within Sugar. Email from these external accounts can then be imported into Sugar and linked to existing records throughout the application. Group mail accounts work the same, but allow multiple users access to the incoming email. For more information on how to add a group mail account, please refer to the Email documentation in the administration guide.
Use the following steps to add a new personal mail account to the emails module:

1. Navigate to the Mail Accounts tab on the Settings screen.
2. Click "Add" under the Mail Accounts section.

3. Select "Prefill Gmail Defaults" to automatically populate the following fields with Gmail default values in the Incoming Email section or enter appropriate values for your mail provider:

   - Mail Account Name : The name or designation of the account.
   - User Name : The user name for your external account.
   - Password : The password for your external account.
   - Mail Server Address : The web address of the external email server from which emails will be viewed in Sugar.
     Note : If you are unfamiliar with these terms and values, please check with your IT department or email provider for the appropriate values for these fields.
   - Mail Server Protocol : The mail protocol used to communicate with the mail server. IMAP is the default selection and provides the best functionality with Sugar.
   - Use SSL : Check this box to force the connection and communication between Sugar and the mail server to use a secure socket layer of encryption.
   - Mail Server Port : The communication port number used for connecting to the mail server.
   - Monitored Folders : The folders in your external account that Sugar will monitor. Inbox is selected by default. To select one or more folders to monitor click "Select" and then pick the folders in your external account for Sugar to monitor.

- Trash Folder : Select a folder from your external account to be designated as the trash folder. Sugar will place deleted emails into this folder on your external account.
- Sent Folder : Select a folder from your external account to store any email being sent from that account through Sugar.

Select "Test Settings" to verify the Incoming Email settings. A window will popup indicating if the test was successful or not.

Monitored Folders: *	INBOX	Select
Trash Folder: *	[Gmail]/Trash	Select
Sent Folder:		Select

Test Settings

4. Enter appropriate values in the following fields in the Outgoing Email section:
   - From Name : The name outgoing email will come from. Defaults to your first and last name from your user profile.
   - From Address : The email address outgoing email will come from. Defaults to the email address from your user profile.
   - Reply to Address : The email address that will receive any replys from your email. If left blank, replies will be sent to the From Address.
   - Outgoing SMTP Mail Server : Select an existing SMTP server from the dropdown list or select Add to specify a new SMTP server. For more information on adding an outgoing SMTP mail server, please refer to the
5. All required fields are marked with a red asterisk and must be completed prior to saving.
6. Once the necessary information is entered, click "Done" to preserve the changes.

Outgoing Email

From Name: *	Sugar Administrator
From Address: *	609.sugar.user@gmail.com
Reply to Address:	
Outgoing SMTP Mail Server: *	system – Gmail

Done   Clear Form

In the mail accounts section you will see any personal and group accounts you have configured.

Mail Account Name	Mail Server Address	Active	Default	Type (i)	Edit	Delete
609.sugar.system	imap.gmail.com	✓	⦿	Personal	✏	⊖
609.sugar.group	imap.gmail.com	✓		Group - Auto-Import		

The buttons and checkboxes in the grid will perform the following actions on the mail account:

- Active : Select this checkbox to either show or hide a mail account in your view of the Emails module. When you deactivate a mail account, the account is not listed on the Folders tab and emails from that account will not display in the Sugar inbox.
- Default : When you have multiple personal email accounts configured, one must be set as the default. When sending email, the "From Name" and "From Address" entered on the default mail account will be automatically selected.
- Type : Displays whether this email account is a group or personal email account.
- Edit : Click the Pencil icon to open the personal account in a popup window to view or edit the details.
  Note : Only administrators can modify group accounts. For more information on how to add or modify a group account, please refer to the [Email](#) documentation in the administration guide.
- Delete : Click the Minus icon to remove the personal account from Sugar.

Configuring Outgoing Mail Servers

Outgoing mail servers are what allow users to send email through Sugar. Sugar allows users to configure multiple outgoing mail servers to send email from. Users have the ability to use the system's outgoing mail server with their own user name and password. If Sugar is not configured with a system outbound account, users may create a personal inbound account to pair with their personal outbound account in order to send emails.
Administrators also have the ability to allow users to use the system user name and password configured in Admin > Email Settings. For more information on how to configure the system outgoing mail server, please refer to the [Email](#) documentation in the administration guide.
If the Sugar administrator has disabled the ability to use the system account for outgoing email, then users will need to enter their user name and password for the mail server in their user profile. For more information on how to enter credentials for the system mail server through the user profile, please refer to the [Getting Started](#) documentation.
Use the following steps to add a new outgoing mail account from the Emails module:

1. Navigate to the Mail Accounts tab on the Settings screen.
2. Click "Add" under the Outgoing SMTP Mail Servers section.

Outgoing SMTP Mail Servers
Provide SMTP mail server information to use for outgoing email in Mail Accounts.

Name	SMTP Server	Edit	Delete
system	Gmail		

Add

3. Enter appropriate values in the following fields in the Incoming Email section:
   - Name : The name or designation of the outgoing mail server.
   - Choose Your Email Provider : Choose your mail provider to populate provider specific values.
   - SMTP Server : The web address of the external email server Sugar will connect to.
   - SMTP Port : The communication port number used for connecting to the mail server.
   - Use SMTP Authentication? : Check this box to connect to the SMTP server using a user name and password. If left unchecked, the SMTP server must accept anonymous connections, which is not recommended.
   - Enable SMTP over SSL or TLS? : Select the appropriate option from the dropdown to use Secure Socket Layer, Transport Layer Security, or no encryption when connecting to the mail server.
   - Email Address / Username : Enter the email address or user name to connect to the SMTP server with.
     Note : The user name used to connect to the SMTP server can be different than the From Address being specified, but the email server needs to be configured properly to allow that account to send email as that email address.
   - Password : Enter the password associated with the entered email address or user name.
4. All required fields are marked with a red asterisk and must be completed prior to saving.
5. Optionally click "Send Test Email" to test the settings entered by sending an email.
6. Once the necessary information is entered, click "Done".

In the Outgoing SMTP Mail Servers section you will see any mail servers you have configured.

The buttons in the grid will perform the following actions on the mail server settings:

- Edit : Click the Pencil icon to open the settings in a popup window to view or edit the details.
  Note : If the ability to use the system account is enabled, the pencil icon will not be available here on the system mail server settings. Alternatively, if the system account is disabled for users, then editing the information here will change the information in your user profile.
- Delete : Click the Minus icon to remove the mail server from Sugar.
  Note : The system outgoing mail settings cannot be removed.

For more information on configuring the system outgoing mail server settings and allowing users to use the system account, please refer to the [Email](#) documentation in the administration guide.

Checking Emails

Sugar provides a couple of different ways to check email accounts within the application. Group email boxes are automatically checked and imported via schedulers. For more information regarding settings up schedulers, please refer to the [Schedulers](#) documentation in the administration guide.
Personal mail accounts can be configured to be checked manually. Use one of the following options to check a personal mail account manually:

- Click the Check Mail button at the top of the Emails module page.

  This will check for new email in each personal account you have configured.
- Right click on the specific personal account you wish to check email for, and select "Check Email"

This will pull new email for only the selected mail account.

Note : Check mail will only pull in new email. If you delete and view email for a personal email account in a mail viewer other than Sugar (Outlook, GMail, etc.) the changes will not always be reflected in Sugar. To get Sugar to see these changes, right click on the mail account and select "Synchronize".

The monitored folders in each personal mail account show under the associated account in the folder view. The number of unread messages in each folder is shown in parentheses next to the monitored folder's name.

Select the folder name to pull the list of emails in that folder into the email view.

Composing Emails

Sugar allows users to compose email from a variety of locations through the application. When you compose an email, if you have configured multiple mail accounts, you can choose the account from which to send the email. This can change the From Name, From address, and Reply To for the email being sent to what is configured on the account you selected. For more information how to add and configure accounts, please refer to the Mail Accounts section in this documentation.

Emails composed in Sugar can contain plain text or rich text formatting utilizing the TinyMCE text editor. For more information on how to use TinyMCE, please refer to the TinyMCE section in the User Interface document in the Application

guide.

Composing Via Emails Module

One of the most common methods of composing email is via the Compose button in the Emails module. This opens up the compose layout which allows you to enter in all the relevant information for the email.
Use the following steps to create a compose an email via the Emails module:

1. Click "Compose"

2. Enter appropriate values for the fields in the layout. All required fields are marked with a red asterisk and must be completed prior to saving.
3. The From is automatically populated with the name and email address for the default mail account. Select the appropriate combination from the dropdown.

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

Composing Via Quick Compose

The Quick Compose allows you to easily compose email from anywhere in Sugar. Simply click any email address in any module's list view, detail view, or elsewhere to launch the quick compose. You can also quick compose an email from any Activities subpanel on related module records.

Use the following steps to compose an email via Quick Compose:

1. Click on an email address on any Sugar page or select "Compose Email" on any Activities subpanel on a related module's detail view.
   From email address :

   From subpanel :

2. Enter appropriate values for the [fields](#) in the layout. All required fields are marked with a red asterisk and must be completed prior to saving.
3. The To address is automatically populated with the email address you clicked on, or the email address for the record you were viewing. The email is also automatically related to the record the email address came from.

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

Composing Via Module's List View

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

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

The following steps cover composing and sending an email from the Accounts list view as an example:

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

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

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

Adding Recipients

Sugar, just like many other email clients, allows multiple recipients for a single email. Recipients can be placed in the To, Cc, and Bcc sections. To enable the Cc and Bcc sections simply click "Add Cc" or "Add Bcc".
When composing an email, you can select email recipients from the address book, which lists existing users, contacts, leads, targets, and accounts. By default, all of

these individuals are listed in the address book; however, you can filter the list if you want to view a specific group such as contacts or users. You can also search for an individual by first name, last name, email address, or account name.
Use the following steps to add recipients via the address book while composing an email:

1. Click "To", "Cc", or "Bcc" to open the Address Book.

2. The Address Book opens defaulting to showing all. Enter a First Name, Last Name, or Email address to search. You can also narrow the results down by selecting a Recipient Type from the dropdown.

   Click the magnifying glass to perform the search and click the "X" to clear the search.
3. The search results show in the grid below. The grid shows 25 records at a time and is paginated.

Click the number of the page you wish to view or the single arrows left and right to go back a page and forward a page respectively. You can also select the far right arrow to navigate to the last page or the far left arrow to navigate to the first page of results.

4. Click on a record in the grid to add the record as a recipient in the To field.

   Select the checkbox next to one or more records and then click "Add To To", "Add To Cc", or "Add To Bcc" to add the selected records to the corresponding recipient field.

5. The records in the grid on the left that have been added as recipients will be highlighted in blue. To remove a recipient, simply click the record in the grid on the left and it will be removed from the Selected recipients grid on the right.

6. Once the necessary recipients have been selected, click "Done".

7. Alternatively, you can add recipients by hand by typing in the email address in the recipient fields separated by a semi-colon.

Note : If the email you are composing is related to a record, there is an option in the address book to only show recipients related to the record selected.

Adding Attachments

Sugar allows you to send attachments along with your email. Attachments can be files from your local computer or documents from within Sugar.
Use to following steps to add attachments to an email while composing:

1. Click "Attach" from the Compose screen.

2. This opens the Attach pane on the right side of the window.
3. To add files from your local computer, select "Add Files".

4. In the popup window, select "Choose File" and then navigate your local computer to select the file you wish to attach.

Click "Attach".

5. Click the Minus icon next to the file name to remove a file from the email.

6. To add documents from within Sugar, select "Add Documents"

7. Click the Arrow icon to launch the search page on the Documents module.

Note : Documents that link to an external account (i.e. Google Docs, IBM SmartCloud, etc.) cannot be used as attachments in emails composed through the Sugar Email client.

8. Locate the document you wish to attach by searching and then selecting the document.

9. Click the "X" next to the document to remove it from the email.

Setting Email Options

Sugar comes with some specific options that are available to you while composing email. To access these options while composing an email, simply click "Options" towards the top of the page.

This opens the Options pane on the right side of the page.

Using a Template

Email templates allow users to create an email based off of a predetermined template. This can reduce typing errors and save time by having common emails prepared into a template. For more information on how to create or modify an email template, please refer to the Email Templates section in this documentation. Use the following steps to utilize a template while composing an email.

1. From the Options pane, select a template to use.

2. Anything currently written in the body or subject of the email you are currently composing will be removed and replaced with the template data.
3. If the selected template has any variable fields defined in it (i.e. $contact_name) then when Sugar sends the email it will replace these variable placeholders with values from the associated record. If no associated record is found, the variable placeholders will be replaced with an empty string.
   Note : If multiple records share the same email address or multiple recipients

are on the email, Sugar will pick one of the record's values to place in the email template to send to all of the email addresses. This can provide undesired results. For more information on how to send a dynamic variable to many recipients, please refer to the [Campaigns](#) documentation in the Application guide.

Using a Signature

Sugar allows you to create multiple signatures to use when composing email. For more information on how to create or edit signatures, please refer to the [General Settings](#) section in this document.

Use the following steps to add a signature while composing an email.

1. From the Options pane, select a signature to use.

2. Depending on your settings, the Signature will appear below or above any content in the body of the email.

Setting Teams

By default, Sugar assigns any composed email to your default teams as specified in your user profile. For more information on how to change your default team, please refer to the [Getting Started](#) documentation. When composing an email you can change or add teams to the email before sending.
Use the following steps to add or remove teams from an email while composing the email:

1. From the Options pane, select the arrow icon to add a team to the email.

2. Search for and select the desired team in the popup window.
3. Select the Primary option on a team to set the team as the primary for the email.

4. Click the minus icon to remove a team from the email.

Sending in Plain Text

By default, Sugar sends email as HTML content. Some email clients can not render HTML content, but prefer email sent as plain text. If there are no images, links, or formatting in your email, then sending it as plain text may be a good option.
To send an email as plain text, simply click "Send in Plain Text" from the Options pane.

Note : TinyMCE is removed from the compose screen when selecting this option since plain text emails contain no formatting.

Relating to Records

Emails in Sugar are implicitly related to records in Sugar that match an email address in the From, To, or Cc fields in the email. This implicit relationship is made for emails sent from Sugar as well as any email imported into Sugar via Inbound email accounts or email archiving. Any emails that contain the implicit relationship will show in the History subpanel of the related record.

While composing an email, users have the ability to set an explicit relationship via the flex relate field. This allows the new email to be related to a single record from one of many modules.

Use the following steps to set the Related To field while composing an email:

1. Select a module from the Related To dropdown.

2. In the field next to the dropdown, you can begin typing the name of the record for the specified module. The type ahead feature will show you any results fro mthat module that match what you have typed.
3. Alternatively, you can select the arrow icon to open up a search window for the selected module.

4. Use the search window to locate and select the desired record to relate to the email.
5. This email will now show in the History subpanel of the selected record.

To modify the flex relate for an email, right click on it in the emails module and select "Relate".

The flex relate field is not the only way to relate an email to records within Sugar. Emails can also be related directly to one or more Accounts, Contacts, and more. Use the following steps to relate an email to other records in Sugar:

1. From the emails module, right click on an email and select "View Relationships"

2. The email's detail view will show in a popup window with subpanels to multiple modules below the email content.
3. Click "Create" or "Select" from a subpanels action menu to either create a new record or select and existing one to relate to this email.

4. Relating a record to an email this way will also force this email to show up in the related record's history subpanel.

Saving Drafts

As an alternative to sending an email right away is to saving it as a draft. You can save an email as a draft so you can continue composing it at a later time. To save an email as a draft while composing, simply click "Save As Draft".

Any emails saved as drafts can be retrieved from the folder pane under "My Emails" > "My Drafts". Any recipients added, templates used, and signatures used on the email are all saved in the draft.

Sending

To send an email to the recipients added on the To, Cc, and Bcc fields, simply click "Send".

Sent emails will use the settings configured to connect to your external mail server to send the email. A copy of every email sent will be in the folder pane under "My Emails" > "My Sent Email".

Viewing Emails

There are various options available for viewing email in Sugar including via Emails Module, Emails detail view, Emails Recently View menu, dashlets, and reports. Sugar allows users to view email from their personal accounts and to import email into Sugar. Once an email is imported into Sugar it is treated just like any other record in Sugar. Please note that you will only be able to see email imported into Sugar as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentations in the Administration guide.
Note : Group email accounts are automatically imported into Sugar.

Viewing Via Emails Module

The Emails module displays all emails for the accounts currently configured. To access the Emails module, simply click the Emails module tab. While the Emails module shows key email fields, you can click on the email to view the email details below. You can also double click an email to open it up in a new tab within the Emails module view. For more information on viewing emails via the emails module, please refer to the [Emails Module View](#) section.

Viewing Via Detail View

The Emails detail view displays thorough email information including all email fields followed by subpanels of the email's related records belonging to various modules. The detail view can be reached by clicking a email record's link from many subpanels and dashlets within the application. For more information on viewing emails via detail view, please refer to the [Emails Detail View](#) section.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which emails and email templates you have recently viewed. Hover on the Emails module tab to see a list of your most recently viewed records and click each name to open the email or email template in the detail view.

Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets which allow users to get a quick view of various records, activities, reports, etc. You can view email information in email-based dashlets such as "My Email". Clicking a email's subject from any dashlet will open the email in detail view. For more information on using dashlets and viewing email records via dashlets, please refer to the [Modules](#) section of the Home documentation.

Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding email and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the email record's detail view by clicking the email's subject in the report results. Please note that you can only directly access contact detail views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation.

Emails Module View

The Emails module view displays any configured email accounts and emails within those accounts. You can view the basic details of each email within the field columns. Please note that for imported Emails you will only be able to see email records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentations in the Administration guide.

Folders

The folders pane typically appears on the left side of the screen and contains a tree structure of any personal email accounts configured as well as any group inboxes being monitored. Sugar comes with some local folders created by default (i.e. My Email, My Drafts, My Sent Email, My Archived Emails), but users have the ability to create their own as well.

Creating Folders

Local folders can be created to hold specific emails that have been imported into Sugar.
Use the following steps to create a new folder from within the Emails module view:

1. From within the Folders pane in the Email module, right click on the folder you wish to create a folder under and click "Create Folder".

2. Enter in the name of the new folder and click "Ok".

3. The new folder will now show in the Folders pane under the selected folder.

Managing Accounts and Folders

Sugar has some actions you can perform to manage any personal email accounts and folders directly from the folders pane. To access these actions simply right click on the folder or account you wish to perform actions on.
Note : Actions can not be performed on group email accounts. For more information on how to manage group email accounts, please refer to the Email documentation in the administration guide.

The following actions can be performed from the folders pane:

- Check Mail : Checks the personal email account or folder selected for any new email.
- Synchronize : Synchronizes the view of your personal email account or folder to the copy on the external server. Any changes made to email via other email clients will not show in Sugar until synchronized.
- Create Folder : Creates a new subfolder from the folder or account selected.
- Delete Folder : Deletes the folder currently selected.
- Rename Folder : Renames the folder or account currently selected.
- Empty Trash : Removes any deleted email from the account's trash directory.
- Clear cache files : Removes any cached email for a personal account.

Search

Sugar allows users to search imported emails to help you locate emails easily and effectively. Once the search is performed, the relevant results will be displayed in the Search Results tab. Please note that Sugar automatically appends the wildcard character (%) to the beginning and end of your search phrase. This allows the system to retrieve all records that contain the keyword entered in the search.
Use the following steps to search imported email via the emails module:

1. Click the magnifying glass icon in the folders pane to view the search form.

2. Enter criteria to search on into one or more of the following fields:
   1. Subject : The subject of the email
   2. From : Who the email was sent from. Includes any name and email address in the From field.
   3. To : Who the email was sent to. Includes any name and email address in the To field.
      Note : Cc and Bcc is not included.
3. Click "Search" to execute the search or "Clear" to empty the search form.

4. Click "More" to be able to search on the additional fields:
    1. Date From : Select a date to search the "Date Sent" field on. Picking a date will show any email sent on or after the date selected.
    2. Date Until : Select a date to search the "Date Sent" field on. Picking a date will show any email sent before the date selected.
    3. Assigned To : Select a user to search on emails assigned to that user. Defaults to the currently logged in user.
    4. Has Attachment? : Select "Yes" to show only emails that have an attachment.
    5. Related To : Select a module and a record in that module to search any emails related to that record.
    Note : Only searches the Flex Relate field, not the additional related subpanels.
5. Click "Less" to hide these additional fields.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and options for which you have given a value. For example, if you select "Has Attachment?" as Yes and enter a subject, Sugar will only return emails with a matching subject that have an attachment. To see all emails to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see emails as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentations in the Administration guide.

Emails List

The emails list displays all emails meeting the current search criteria or the selected account/folder and to which your user has access. You can view the basic details of each email within the field columns. Unread emails display in bold font where read emails are normal. Please note that you will only be able to see emails as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#)documentations in the Administration guide.

Columns

The columns in the email list show specific information about the emails being shown. The below definitions are the meanings of each column in the emails list:

Field	Description
Attachment	Shows a paperclip icon if the email has an attachment Note : Only shows for emails imported into Sugar.
Flagged	Shows an exclamation point if an email is marked as flagged
Reply	Shows an arrow when you have replied to the specified email
From	The name and email address the email was sent from
Subject	The subject of the email
Date Sent	The date the email was sent
To	The name and email address(es) the email was sent to

Column Sorting

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

Pagination

Emails list displays the current search results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. Below the emails list you can see which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page

buttons allow you to skip to the beginning or the end of your current results. Sugar displays 20 records per list view page.

Actions Menu

Sugar can perform specific actions on emails within the emails module. Some of the actions depend on if the email is imported or not. To access the action menu, simply right click on an email from within the emails module.

The following definitions are the available actions users can perform on emails:

Menu Item	Description
View Relationships	Opens a popup window to the detail view of the selected email Note : Only available for imported emails
Open Multiple Messages	Opens the email in a new tab in the emails view giving you the ability to pen multiple emails
Import to Sugar	Triggers the import popup allowing you to set a team, assigned to user, and related to while importing the email to Sugar
Reply	Compose a new email directed to the sender as a reply to the selected email
Reply All	Compose a new email directed to all recipients as a reply to the selected email
Forward	Forward the selected email to aditional recipients

Delete	Send the selected email to the trash folder
Print	Send the selected email to the printer
Mark	Set the selected email as unread, read, flagged, or unflagged
Assign To	Opens a popup window to change the assigned to or team fields
Relate	Opens a popup window to change the flex related to field

Email Panel

The email panel is typically shown in the bottom right corner of the Emails module, but can also be opened in a separate tab within the module. The email panel displays thorough email information including all fields of the email. The email panel can be reached by clicking an email in the emails list or by right clicking an email in the emails list and selecting "Open Multiple Messages".

The email panel comes with specific actions that can be performed on the specified email. The following actions can be performed from the email panel:

Menu Item	Description
Reply	Compose a new email directed to the sender as a reply to the selected email
Reply All	Compose a new email directed to all recipients as a reply to the selected email
Forward	Forward the selected email to additional recipients
Delete	Send the selected email to the trash folder
Print	Send the selected email to the printer
View	Select "Display Headers" or "Display Raw Email" to view the respected detail

	in a popup window Note : Only available on email not imported into Sugar.
[Import to Sugar](#)	Imports the email into Sugar in order to be related to records and viewable by others
[Quick Create](#)	Launches the quick create form for the selected module while importing the email, defaulting values into the name and description fields of the module, and automatically relating the email to the new record
[View Relationships](#)	Opens a popup window to the detail view of the selected email Note : Only available for imported emails

Emails Detail View

The Emails detail view displays thorough email information including all email fields. You can also view an email's related records (Accounts, Contacts, Opportunities, etc.) which appear in subpanels beneath the email fields. The detail view can be reached by clicking an email's subject link from anywhere in the application outside of the emails module.

Please note that you will only be able to view a email record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentations in the Administration guide.

Actions Menu

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

Prune Database on 1st of Month ⭐

Edit ▾
Duplicate
Delete
ob Name: Prune Database on 1st of Month
Date & Time Start: 01/01/2005 02:30pm
Date & Time End: 12/31/2020 06:59pm

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

Menu Item	Description
Forward	Forward the selected email to additional recipients
Reply	Compose a new email directed to the sender as a reply to the selected email
Reply All	Compose a new email directed to all recipients as a reply to the selected email
Delete	Send the selected email to the trash folder

Subpanels

Beneath an email record's fields are subpanels containing related records from various modules, attachments, and the email's activities.

Related Record Subpanels

The most common type of subpanels displayed on a email's detail view contain the email's related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. For example, an email may be related to only one task via the flex relate but related to multiple opportunities. This means that the related task will be displayed amongst the email's fields while opportunities will be displayed in a subpanel beneath the fields.
Related record subpanels allow the following operations to be performed. Please note that administrators in Sugar can change the subpanel's Action menu to be displayed as separate buttons instead of a dropdown via Admin > System Settings. For more information, please refer to the System documentation in the Administration guide.

- To view the details of a related record, click the record's name in the subpanel to open it in detail view.
- To relate an existing record to the email, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the email, choose "Create" from the subpanel's Action menu, then complete the Quick Create form and click "Save".
- To edit a related record, choose "Edit" on the far right of the record's row.
- To delete the email's relationship to a record, choose "Unlink" from the dropdown on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

Attachments Subpanel

The Attachments subpanel lists file attachments that are related to the email record. Attachments are stored in Sugar connected to Note records. The Note record and the attachment can be accessed directly from the Attachments subpanel.

Email Contacts Subpanel

The Email Contacts subpanel will lookup any contact records in Sugar that match an email address listed in the To, Cc, Bcc, or From fields in the current email. The contact records do not need to be directly related to the email for the contacts to show in this subpanel as the connection is dynamically made via the email addresses.

Importing Emails

Importing emails from external mail accounts enables you to manage them within Sugar. You can assign imported emails to other users for follow-up, and relate them to records. Imported emails display in the My Emails folder. You can also view unread imported emails in the My Emails Dashlet on your homepage. For more information on using dashlets and viewing email records via dashlets, please refer to the [Commonly Used Dashlets](#) section of the Home documentation.
Use the following steps to import an email from an external account to Sugar:

1. From the Folders pane, select a monitored folder from an external account.

2. Right click on an email you wish to import and select "Import to Sugar".

   Alternatively, select the email and in the email pane, select "Import to Sugar"

A Third option is to drag and drop the email from the Emails list to the "My Emails" section of the folder pane.

3. Update the necessary fields, then click "Import to Sugar" to complete the import.

Note : The Delete message from server option will delete the email from the monitored folder in the external account.

Viewing Email Relationships

From the emails list you can select an email to view the relationships that email has to other records within Sugar. Select "View Relationships" by right clicking on an email:

or by selecting an email and clicking the button in the email pane:

This will open up a popup window with the detail view of the email. For more information on the detail view, please refer to the Emails Detail View section in this documentation.

Opening Multiple Messages

In the Emails module, users can view emails in the email pane by selecting an email. Another way to view emails would be to open the email into a new tab within the emails module. You can do this by right clicking on an email and selecting "Open Multiple Messages".

This will open the selected email into a new tab within the emails module.

Replying to Emails

Sugar includes the standard "Reply" and "Reply All" functions that are included in most email clients. When replying to an email, Sugar composes a new email while populating the body, subject, and recipients of the email. The subject line from the email you are replying to comes over to the new email, but is preceded with "RE: ". The body from the email you are replying to is also pulled into the new email, but is indented and has a line above the contents to separate the original email from the content you are adding to the reply.

Select "Reply" to reply to only the sender of the selected email or select "Reply All" to reply to the sender and any other recipient on the original email. You can access "Reply" and "Reply All" by right clicking on an email:

Or from the email pane:

Or from the email's detail view:

Enter your reply above the divider line in the compose email screen. For more information on how to compose an email, please refer to the [Composing Emails](#) section.

Forwarding Emails

Sugar includes the standard "Forward" function that is included in most email clients. When forwarding an email, Sugar composes a new email while populating the body, subject, and recipients of the email. The subject line from the email you are forwarding comes over to the new email, but is preceded with "FW: ". The body from the email you are replying to is also pulled into the new email, but is indented and has a line above the contents to separate the original email from any content you are adding to the forward.
You can access "Forward" by right clicking on an email:

Or from the email pane:

Or from the email's detail view:

Enter any additional content above the divider line in the compose email screen. For more information on how to compose an email, please refer to the Composing Emails section.

Printing Emails

Sugar comes with the ability to print email. When printing, Sugar will open the email in a popup window and displays the email in a printer friendly version.

You can access "Print" by right clicking on an email:

Or from the email pane:

Marking Emails

Sugar allows users to mark emails as read, unread, flagged, and unflagged. This can be helpful for locating important emails from within the emails module.

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

Menu Item	Description
Marking as Unread	Sets an email to be unread making it show in bold.
Marking as Read	Sets an email to be read making it show as nornal text.
Marking as Flagged	Sets an email as flagged placing an exclaimation mark new to the email.
Marking as Unflagged	Sets an email as unflagged, removing the exclaimation mark from a flagged email.

Assigning Emails

When importing an email into Sugar you can set the assigned to and team fields to a Sugar user and a Sugar team. If you wish to change these fields for an already imported email, you can right click on the email from the emails list and select "Assigned To".

The Assign To popup window opens defaulting in the current assigned user for the selected email.

Change the Assigned To and Teams fields to the desired records.
Note: For the Teams field, use "Replace" to remove existing team assignments before adding those specified here. Use "Add" to add the teams specified here to any existing team assignments.

Relating Emails

When importing an email into Sugar, you can assign a single module and record to be related to this email via the flex relate field. For already imported email, you can change the related to field by right clicking on the email in the emails list and selecting "Relate".

The Relate Email popup window opens defaulting the current assigned module for the selected email.

Change the Module from the dropdown and select the desired record for that module.
Note : This field controls which module and record this email shows up in the history subpanel for.

Viewing Email Details

Users can view some additional backend detail about email from external accounts by clicking "View" from the email pane.

Note : The View option is only available on email that is not imported into Sugar.

Displaying Headers

From the View option, select "Display Headers" to view the header details for an email. The header details include information such as the email servers used and the content-type of the email.

Displaying Raw Email

From the View option, select "Display Raw Email" to view the raw contents of an email. The raw contents show the html content of the body as well as the email header information.

Creating Records From Emails

Users in Sugar can launch a quick create form for many modules directly from an external email or from an imported email. From the emails pane, click "Quick Create" and select the desired module record to create from the email.

The quick create form for the selected module opens in a popup window. The name and description fields for the selected module are populated by default with the subject and body of the email. All required fields are marked with a red asterisk and must be completed prior to saving. Once the necessary information is entered, click "Save".

The email selected will then be imported, if not already, and will be related to the new record. If a relationship does not exist between emails and the selected module (i.e. Tasks) then the relationship will be made via the flex relate field.

Deleting Emails

If a email is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Emails detail view or Emails Module. Deleting via the detail view allows you to delete a single record while the module view allows for mass deleting multiple records at once. Deleting email records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.
Please note that your ability to delete emails may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

Deleting Via Detail View

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

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

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

Mass Deleting Via Emails Module

Use the following steps to delete one or more email records via the emails module:

1. Navigate to the emails module by clicking the Emails module tab.
2. Select an account or folder, or perform a search from the Folders pane.
3. Select the desired email records individually or hold ctrl (command on Mac) to select multiple.
4. Choose "Delete" from the right click menu.

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

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

Email Templates

Email templates are used in Sugar as simple form letters, automated email responses, or just commonly used emails to save time and prevent typos. When a user receives an email regarding a case or bug, then can send back a standard response email using an email template. Email templates are also used for campaigns within Sugar as well as workflows. For more information on how to create and modify email templates for campaigns, please refer to the Creating Email Templates section in the Campaigns documentation. For more information on how to create and modify email templates for workflows, please refer to the Creating Alert Templates section in the Workflow Management documentation. Email templates can contain text, HTML content, and images. Users can embed .jpg or .png image files from their local computers or from the Sugar database into the template. Image files such as .gif, .bmp, .png, .jpg, .jpeg can be included as attachments, but cannot be embedded. Placeholder variables can be added to the template for field values like the contact's name so you can personalize the email to your recipients.

Creating Email Templates

Use the following steps to create an email template via the Emails module:

1. Hover on the Emails module and select "Create Email Template".

2. Complete the fields on the screen as follows. Any required fields are marked with a red asterisk and must be completed:
   Name : Enter an internal name for the email template.
   Type : Select either "Campaign" or "Email".
   Note : You can create an email template for a campaign through this interface; although, you cannot insert tracker URL links to the template. For more information on how to create an email template for campaigns, please refer to the Campaigns documentation in the Application guide.
   Teams : Select the Sugar team(s) assigned to the email template.
   Assigned To : The Sugar user assigned to the email template.
   Description : Enter a description or other information about the template.
   Subject : Enter the subject of the emails that will be sent.
   Body : Enter the body of the emails that will be sent.
   Attachments : Click "Choose File" to navigate to a location on your computer to attach a file. Click "Sugar Document" to attach a file from the sugar database.
   Note : Documents that link to an external account (i.e. Google Docs, IBM SmartCloud, etc.) cannot be used as attachments in emails composed through the Sugar Email client.
3. Using the TinyMCE functions, add simple formatting to your email's content. For more advanced customization you can click the HTML button in the top left to access and edit the generated HTML code.
   For more information on using TinyMCE, please refer to the TinyMCE section fn the User Interface documentation in the Application guide.
   Note: If images or advanced CSS are required in your email template, it is highly recommended to host the images or CSS file on a publicly available hosting service and link to it in the email template.
4. Click "Save" to preserve your changes to the email template.

Inserting Variables

When constructing the subject and body of your email, Sugar allows you to insert variables, or placeholders, into the template that will be populated with the record's information for that variable. Use the following steps to insert a variable for the recipient's first name into the template:

1. Click to place your cursor on the location in the subject or body where the recipient's first name should appear.

2. In the Insert Variable row, select the module you would like to insert a variable from.

3. Set the second dropdown to the desired field from the modules selected in the first dropdown. For our example, select "First Name".

4. Click "Insert" to insert the generated variable name to your subject or body at your cursor's location.

If there are no images, links, or formatting in your email, then sending it as text only may be a good option. Click the Send Text Only checkbox to remove the HTML formatting options. Alternatively you can click "Edit Plain Text" at the bottom of the page to have the plain text option send differently than the HTML text.

Viewing Email Templates

There are various options available for viewing email templates in Sugar including via list view, detail view, and Emails Recently Viewed menu. Please note that you will only be able to see email templates as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentations in the Administration guide.
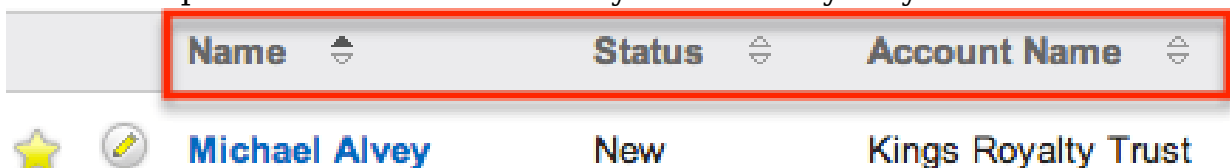
The list view displays all email templates meeting the current search criteria. To access the list view, simply hover over the Emails module tab and select "View Email Templates".

While list view shows key fields, you can click the email template's name to open the record in detail view.

The detail view displays thorough information including all email template fields. Select "Edit" to edit the email template.

Sugar Email Archiving

Sugar Email Archiving is an automatic email importing service that allows users to import emails into Sugar by sending them from any mail client or service to a Sugar-provided email address. Each Sugar instance has its own unique Sugar

Email Archiving mailbox. To import emails, a user sends or forwards emails to the unique Sugar Email Archiving email address using the To, Cc, or Bcc fields. The Sugar Email Archiving service will import the email into the Sugar instance. The service imports the email, along with any attachments, images, and calendar events, and creates records within the application that are associated with existing records by matching email addresses in the To and Cc fields. The imported emails will also be related to a specified case number by including the case macro and the case number (i.e. [CASE:{number}]) in the subject of the email.

Note : Email Archiving cannot read email addresses from the Bcc field the same as when you receive an email.

Emails can be sent to the Sugar Email Archiving address and viewed in the History subpanels in Detail View pages for the following modules:

- Accounts
- Contacts
- Leads
- Opportunities
- Cases

Emails with .ics meeting attachments sent to SNIP are parsed by Sugar. The Meeting record is created and for every email that is invited to the meeting, if User, Contact or Lead record exists matching this email, this record is added to the list of invitees for the meeting.

Email Archiving can be configured via Admin > Email Archiving. For more information on how to setup and configure Email Archiving, please refer to the [Email](#) documentation in the administration guide.

Note : If the email client is configured to use non-English From, To, and Cc fields, forwarding emails inline to Email Archiving may not work. Send the email to Email Archiving directly using the Cc and Bcc fields or forward the email as an attachment. For large volume of non-English emails that need to be archived using Email Archiving, set a rule in your email application to copy the emails to the SNIP email address.

Last Modified: 01/04/2016 02:27pm

Tasks

Overview

Sugar's Tasks module consists of individual tasks throughout your organization. Task records can be related to one record in most modules via the flex relate field and can also be related to a single Contact. There are various ways you can create

tasks in Sugar such as via the Tasks module, importing tasks, via Activities subpanels, etc. Once the task record is created, you can view and edit information pertaining to the task via the Tasks detail view. Depending on the details on the task, you may also be able to view and edit the task information via the Calendar module. Each task record may then relate to other Sugar records such as accounts, contacts, opportunities, and many others. This documentation will cover how to use the Tasks module as well as the various actions and options available from within the module.

Task Fields

The Tasks module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

Field	Description
Assigned To	The Sugar user assigned to the task
Contact Name	The contact record the task is related to Note: When populated, this task will show in the contact's Activities or History subpanel depending on status.
Description	A description or other information about the task
Due Date	The date and time the task is due to be completed Note: When populated, the task will show on the assigned user's Calendar.
Priority	The priority or importance of the task (e.g. High, Medium, Low)
Related to	The module and record that is related to this task Note: This will decide which module the task will show in the Activities and History subpanels.
Start Date	The date and time the task is started
Status	The current status of the task (e.g. Not Started, In Progress, Completed, etc.)
Subject	The subject or brief summary of the task

Teams	The Sugar team(s) assigned to the task record

Tasks Module Tab

The Tasks module tab is typically located under the More tab on the navigation bar at the top of any Sugar screen to the right of the home cube icon. Depending on your settings, you may have to click "Show More" in order to see the Tasks module tab. Click the tab to access the Tasks list view. You may also hover on the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of tasks you last viewed in the module. The Favorites menu displays the list of tasks you most recently marked as favorites in the module.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Tasks	Opens the edit view layout to create a new task
View Tasks	Opens the list view layout to search and display tasks
Import Tasks	Opens the import wizard to create or update tasks using external data

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

- The top navigation bar may be filtered based on a specific tab grouping (e.g. Activities, Reports, etc.) of which the Tasks module is not a member. Click the More tab (last tab on navigation bar) then hover on "Filter Menu By" to check how the navigation bar is grouped. For more information on tab grouping, please refer to the User Interface documentation.
- The Tasks module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Tasks module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting

Started documentation.
- The administrator may have disabled the Tasks module for your entire Sugar instance. Reach out to your Sugar administrator to have the Tasks module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the [Developer Tools](#) documentation in the Administration guide.

Creating Tasks

There are various methods for creating tasks in Sugar including via the Tasks module, quick create, duplication, importing tasks, and via the activities subpanel. The full edit view layout opens when creating the task directly from the Tasks menu and includes all of the relevant fields for your organization's tasks. The quick create form is a shortened version of the tasks edit view and typically contains fewer fields. When using quick create to make a task while viewing an existing record of another module, Sugar automatically creates a relationship between both records. For example, if you are viewing an account record (e.g. ABC Company) and create a new task via the quick create form, the Account module is selected and the Related to will automatically populate with "ABC Company", thus creating the relationship. Both the Edit View and Quick Create layouts can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#) documentation in the Administration guide.

Creating Via Tasks Module

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

1. Hover on the Tasks module and select "Create Task".

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

Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. If you do not see the "Create Task" option, please click "Show More" to see more Quick Create options. You can also quick create a task from any Activities subpanel on related module records.
Use the following steps to create a task via Quick Create:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Task" or select "Create Task" on any Activities subpanel on a related module's detail view.
   From Quick Create menu:

From Activities subpanel:

2. Enter appropriate values in the fields in the quick create form. All required fields are marked with a red asterisk and must be completed prior to saving.
3. The Related To field is automatically populated with the module and record you are currently viewing.
Note: When creating from the Contacts module, the contact will be populated in the Contacts relationship and the account assigned to the contact will be populated in the Related To.
4. If additional fields are desired, click the Full Form button to use edit view instead.
5. Once the necessary information is entered, click "Save".

Creating Via Duplication

You can also create a new task by duplicating an existing task record. The duplicate option is useful if the task you are creating has similar information to an existing task.
Use the following steps to create a task by duplicating an existing record:

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

Populate Account Info ☆

Edit ▼
Duplicate
Delete
Close and Create New | ılate Account Info
Close

Due Date: 03/07/2013 01:00pm

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

Create

Save | Cancel | Close and Create New

❖ Overview

Subject: * Populate Account Info

Start Date:
[   ] 🗓 [▼] : [▼] [▼]
mm/dd/yyyy   11:00pm

Due Date:
03/07/2013 🗓 [01 ▼] : [00 ▼] [pm ▼]
mm/dd/yyyy   11:00pm

Creating Via Email

Users in Sugar can launch a quick create form to create a task from an external email or from an imported email. From the emails pane in the Emails module, click "Quick Create" and select "Task".

The quick create form opens in a popup window. The name and description fields for the task are populated by default with the subject and body of the email. All required fields are marked with a red asterisk and must be completed prior to saving. Once the necessary information is entered, click "Save".

The email selected will then be imported, if not already, and will be related to the new task. A relationship will be made between the email and the task created via the flex relate field.

Importing Tasks

The import function allows you to push multiple task records into Sugar using a comma (or other character) delimited file instead of creating them one-by-one. For more information on importing, please refer to the Import documentation.

Use the following steps to import tasks via the Import Tasks option:

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

2. In Step 1, select the source of the data you are importing. Click "Next".
3. In Step 2, select the import file and choose "Create new records only". Click "Next".
4. In Step 3, confirm the import file properties. Click "Next".
5. In Step 4, confirm the field mappings for the import. Click "Next".
6. In Step 6, view the import results.
   - The Created Records tab will show all of the new task records.
   - The Duplicates tab will show any records in the file that were identified

as duplicates of existing records and thus not imported.
- The Errors tab will show records that were not imported due to errors detected during import.

Viewing Tasks

There are various options available for viewing task records in Sugar including via Tasks list view, Tasks detail view, Tasks Recently Viewed menu, dashlets, and reports. Please note that you will only be able to see task records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentations in the Administration guide.

Viewing Via List View

The Tasks list view displays all task records meeting the current search criteria. To access the list view, simply click the Tasks module tab. While list view shows key task fields, you can click the task's name to open the record in detail view. For more information on viewing tasks via list view, please refer to the Tasks List View section of this documentation.

Viewing Via Detail View

The Tasks detail view displays thorough task information including all task fields followed by subpanels of the task's related records belonging to various modules. The detail view can be reached by clicking a task record's link from anywhere in the application including from the Tasks list view. For more information on viewing tasks via detail view, please refer to the Tasks Detail View section of this documentation.

Viewing Via Recently Viewed

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

Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets which allow users to get a quick view of various records, activities, reports, etc. You can view task information in task-based dashlets such as "My Open Tasks". Clicking a task's subject from any dashlet will open the task in detail view. For more information on using dashlets and viewing task records via dashlets, please refer to the [Modules](#) section of the Home documentation. You can also close the task in the My Open Tasks dashlet, by clicking the "x" icon to the far left of each list view row. For more information on closing tasks, please refer to the [Closing Tasks](#) section of this documentation.

Please note that when viewing the Tasks dashlet, the due date will be shown in one of three colors: black, orange, or red. Due dates change color on the tasks list to allow the user to quickly see which scheduled tasks are past their due date, regardless of the current status.

The date colors in the Tasks dashlet are as follows:

- Black : The due date has not passed yet.
- Orange : The due date is today.
- Red : The due date has passed.

Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding tasks and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the task record's detail view by clicking the task's subject in the report results. Please note that you can only directly access task detail views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the [Reports](#) documentation.
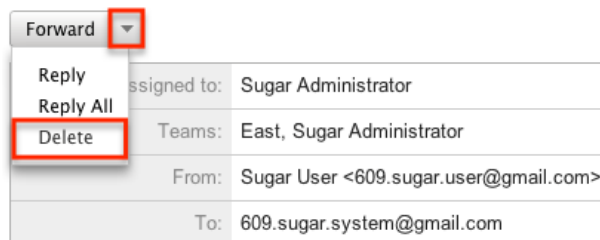

Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

Searching Tasks

The Tasks list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Tasks list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.
For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the [Search](#) documentation.

Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.
The buttons and checkboxes available in Basic Search panel have the following functions:

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

Schedulers

Job Name		Search	Clear

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Items" and enter a task subject, Sugar will only return task records with a matching subject that are assigned to you. Once the search is complete, the

relevant results will populate in the list view below the search panel. To see all task records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see task records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentations in the Administration guide. Administrators can configure what fields appear on the Task Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Advanced Search

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

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

When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select "My Favorites" and enter in a task subject to search, Sugar will only return task records with a matching subject that you have marked as favorites. When searching by a multiselect or dropdown field (e.g. "Assigned to"), however, Sugar will return records matching any of these selections. Once the search completes, the relevant results will populate in the list view below the search panel. To see all task records to which you have access, simply click "Clear" and then "Search" to perform a

blank search with no filters. Please note that you will only be able to see task records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentations in the Administration guide. Administrators can configure what fields appear on the Task Advanced Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Global Search

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

To use global search, you need to first enter the keyword into the search box. With Full Text Search enabled, pop-up results will begin appearing once you input three or more characters. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. When Full Text Search is not enabled, results starting with your keyword will appear after clicking the magnifying glass icon or hitting your Return/Enter key. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.
Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results. For more information on configuring your Global Search, please refer to the Advanced Options section of the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to t he Studio documentation as well as the Search section of the System documentation in the Administration guide.

Tasks List View

The Tasks list view displays all task records meeting the current search criteria and to which your user has access. You can view the basic details of each task within the field columns. Please note that you will only be able to see task records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and

[Role Management](#) documentations in the Administration guide.

When viewing the Tasks list view, the due date will be shown in one of three colors: black, orange, or red. Due dates change color on the tasks list to allow the user to quickly see which scheduled tasks are past their due date, regardless of the current status.

The date colors in the Tasks list view are as follows:

- Black : The due date has not passed yet.
- Orange : The due date is today.
- Red : The due date has passed.

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

Pagination

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

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

Checkbox Selection

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

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

Actions Menu

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

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

Menu Item	Description
Delete	Delete one or more tasks

Mass Update	Mass update one or more tasks
Export	Export one or more tasks to a CSV file

Favorite Designation

Users have the option to mark task records as favorites via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Tasks module tab. In the Tasks list view, the star on the left of each task's row is yellow once marked to indicate a favorite task. For more information on how to mark records as favorites, please refer to the Favoriting Tasks section of this documentation.

Closing Tasks

Tasks in Sugar have a status field which indicate whether a task is Open, In Progress, or Completed. Rather than force users to open the Tasks edit view and change the status when completing a task, you have the ability to complete a task directly from the Tasks list view by clicking the Close button to the left of the task's subject.

For more information on closing tasks please refer to the Closing Tasks section in this document.

More Information

Additional details for each task can be viewed by clicking the "i" icon to the far right of each list view row. This provides users a quick view of additional task information in addition to what appears in the display column fields. The resulting

pop-up window will show the Start Date & Time, Due Date & Time, Priority, Status, and Description fields by default. The list of fields appearing here may only be configured through a code-level customization.

Column Sorting

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

Tasks Detail View

The Tasks detail view displays thorough task information including all task fields which are grouped by default into the Overview and Other panels. You can also view a task's related records (Notes and Attachments) which appear in subpanels beneath the task fields. The detail view can be reached by clicking a task record's link from anywhere in the application including from the Tasks list view.
Please note that you will only be able to view a task record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentations in the Administration guide.Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Actions Menu

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

Prune Database on 1st of Month ⭐

Edit ▾
Duplicate
Delete | ob Name: | Prune Database on 1st of Month
Date & Time Start: | 01/01/2005 02:30pm
Date & Time End: | 12/31/2020 06:59pm

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

Menu Item	Description
Edit	Edit this task
Duplicate	Duplicate this task
Delete	Delete this task
Close and Create New	Close this task as "Completed" and duplicate to a new task Note: This option only appears as long as the status does not equal "Completed".
Close	Close this task as "Completed" Note: This option only appears as long as the status does not equal "Completed".

Favorite Designation

Users have the option to mark task records as a favorite via the detail view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Tasks module tab. In the Tasks detail view, the star on the right of the task's subject is yellow once marked to indicate a favorite task. For more information on how to mark records as favorites, please refer to the Favoriting Tasks section of this documentation.

Next or Previous Record

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

Subpanels

Beneath a task record's fields are subpanels containing related records from various modules. By default the only related module to the Tasks module is the Notes module.

Related Record Subpanels

The types of subpanels displayed on a task's detail view contain the tasks related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. For example, a task may be related to only one contact but related to multiple notes. This means that the related contact will be displayed amongst the task's fields while notes will be displayed in a subpanel beneath the fields.
Users with administrator or developer access have the ability to change the fields (e.g. Name, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the [Studio](#)

documentation in the Administration guide.

Related record subpanels allow the following operations to be performed. Please note that administrators in Sugar can change the subpanel's Action menu to be displayed as separate buttons instead of a dropdown via Admin > System Settings. For more information, please refer to the [System](#) documentation in the Administration guide.

- To view the details of a related record, click the record's name in the subpanel to open it in detail view.
- To relate an existing record to the task, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the task, choose "Create" from the subpanel's Action menu, then complete the Quick Create form and click "Save".
- To delete the task's relationship to a record, choose "Remove" from the dropdown on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

Please note that administrators can prevent users from moving subpanels to different locations in the detail view. For more information on preventing rearranging of subpanels, please refer to the [System](#) documentation in the Administration guide. Check with your system administrator if you are not able to rearrange your subpanels.

Editing Tasks

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

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

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

the Edit options.

Administrators in Sugar may configure both the Tasks edit view and quick create via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

Editing Via Detail View

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

Editing Via List View

You can edit tasks via the list view by clicking the Pencil icon to the left of each task's subject. A pop-up window will open with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes.

Editing Via Dashlets

You can edit tasks by clicking the pencil icon to the far right of any task-based dashlet on your Sugar home page. For example, clicking the pencil icon within the My Open Tasks dashlet will open a pop-up window with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. For more information on dashlets, please refer to the Home documentation.

Editing Via Reports

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

Deleting Tasks

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

delete any related records to avoid orphaned records.

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

Deleting Via Detail View

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

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

Prune Database on 1st of Month ⭐

Edit ▼		
Duplicate		
Delete	b Name:	Prune Database on 1st of Month
	Date & Time Start:	01/01/2005 02:30pm
	Date & Time End:	12/31/2020 06:59pm

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

Mass Deleting Via List View

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

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

☐ ▼ | Delete ▼ | Selected: 2

Scheduler ⇕

☑ ☆ ✏ **Run Full-text Index**

☑ ⭐ ✏ **Prune Database on 1st of Month**

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

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

Closing Tasks

Tasks in Sugar have a status field which indicate whether a task is Open, In Progress, or Completed. Rather than force users to open the Tasks edit view and change the status when completing a task, you have the ability to complete a task from a variety of locations.

Closing Via List View

Use the following steps to close a task via the list view:

1. Navigate to the Tasks list view by clicking the Tasks module tab.
2. Use the [Basic](#) or [Advanced Search](#) to find the task records you wish to delete.
3. Mark the X icon on the left of each desired task's row.

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

Closing Via Detail View

Use the following steps to close a task via the detail view:

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

Close and Create New Via Detail View

Use the following steps to close and duplicate a task via the detail view:

1. Navigate to a task record's detail view.
2. Select "Close and Create New" from the Actions menu.

3. The displayed edit view is pre-populated with the original task's values. By default, the new task's status is set to "Not Started". Update the necessary fields, then click "Save".

Close and Create New Via Edit View

Use the following steps to close and duplicate a task via the edit view:

1. Navigate to a task record's edit view.
2. Select "Close and Create New".

3. The displayed edit view is pre-populated with the original task's values. By default, the new task's status is set to "Not Started". Update the necessary fields, then click "Save".

Exporting Tasks

Sugar's Export option allows users to download all fields for the selected tasks to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use task data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered tasks back into Sugar. For more information on updating existing records via import, please refer to the [Import](#) documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of tasks records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Tasks may be exported from the Tasks list view by selecting "Export" from the

Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for tasks and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.

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

Mass Updating Tasks

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

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

1. Navigate to the Tasks list view by clicking the Tasks module tab.

2. Use the list view's [Basic](#) or [Advanced Search](#) to identify tasks you wish to modify.
3. Select the desired tasks individually or using the [checkbox dropdown's](#) options.
4. Choose "Mass Update" from the Actions menu.

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

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

Favoriting Tasks

Each Sugar user has the option to designate their own favorite tasks which are important or will be viewed often so that they can easily be accessed via search or from the Tasks module tab. Once records are marked as favorites, use the My Favorites checkbox in the Tasks [Basic](#) or [Advanced Search](#) to retrieve your favorites or select from your most recent favorites directly from the [Tasks Module Tab](#) .

Favoriting Via List View

Use the following steps to mark records as favorites via the Tasks list view:

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

Favoriting Via Detail View

Use the following steps to mark records as favorites via the Tasks detail view:

1. Navigate to a task record's detail view.
2. Click the star icon to the right of the task's subject in the upper left of the detail view to designate it as a favorite.
3. To remove the task as a favorite, click the star again to revert it to white.

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

Notes

Overview

Sugar's Notes module consists of individual notes throughout your organization. Note records can be related to one record in most modules via the flex relate field and can also be related to a single Contact. Notes can hold generic text about a record or even an attachment related to the record. There are various ways you can create notes in Sugar such as via the Notes module, importing notes, via History subpanels, etc. Once the note record is created, you can view and edit information pertaining to the note via the Notes detail view. Each note record may then relate to other Sugar records such as accounts, contacts, opportunities, and many others. This documentation will cover how to use the Notes module as well as the various actions and options available from within the module.

Note Fields

The Notes module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

Field	Description
Assigned To	The Sugar user assigned to the note
Attachment	An optional file to attach to the note Note : The Sugar administrator can specify the maximum file size allowed to be uploaded.
Contact	The contact record the note is related to. Note : If populated, this note will show in the contact's History subpanel
Display in Portal?	Select this checkbox to allow the note to be displayed in the customer portal
Note	The details and content of the note
Related to	The module and record that is related to this note Note : This will decide which module this note will show in the History subpanel

Subject	The subject or designation of the note
Teams	The Sugar team(s) assigned to the note record

Notes Module Tab

The Notes module tab is typically located under the More tab on the navigation bar at the top of any Sugar screen to the right of the home cube icon. Depending on your settings, you may have to click "Show More" in order to see the Notes module tab. Click the tab to access the Notes list view. You may also hover on the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of notes you last viewed in the module. The Favorites menu displays the list of notes you most recently marked as favorites in the module.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Note or Attachment	Opens the edit view layout to create a new note
View Notes	Opens the list view layout to search and display notes
Import Notes	Opens the import wizard to create or update notes using external data

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

- The top navigation bar may be filtered based on a specific tab grouping (e.g. Activities, Reports, etc.) of which the Notes module is not a member. Click the More tab (last tab on navigation bar) then hover on "Filter Menu By" to check how the navigation bar is grouped. For more information on tab grouping, please refer to the User Interface documentation.
- The Notes module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Notes module in the Hide Modules list, simply

move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the [Layout Options](#) section of the Getting Started documentation.

- The administrator may have disabled the Notes module for your entire Sugar instance. Reach out to your Sugar administrator to have the Notes module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the [Developer Tools](#) documentation in the Administration guide.

Creating Notes or Attachments

There are various methods for creating notes in Sugar including via the Notes module, quick create, duplication, importing notes, and via the history subpanel. The full edit view layout opens when creating the note directly from the Notes menu and includes all of the relevant fields for your organization's notes. The quick create form is a shortened version of the notes edit view and typically contains fewer fields. When using quick create to make a note while viewing an existing record of another module, Sugar automatically creates a relationship between both records. For example, if you are viewing an account record (e.g. ABC Company) and create a new note via the quick create form, the Account module is selected and the Related to will automatically populate with "ABC Company", thus creating the relationship. Both the Edit View and Quick Create layouts can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#) documentation in the Administration guide.

Creating Via Notes Module

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

1. Hover on the Notes module and select "Create Note or Attachment".

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

Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also quick create a note from any history subpanel on related module records.
Use the following steps to create a note via Quick Create:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Note or Attachment" or select "Create Note or Attachment" on any history subpanel on a related module's detail view.
   From Quick Create menu:

From History subpanel:

2. Enter appropriate values in the [fields](#) in the quick create form. All required fields are marked with a red asterisk and must be completed prior to saving.
3. The Related To field is automatically populated with the module and record you are currently viewing.
   Note : When creating from the Contacts module, the contact will be populated in the Contacts relationship and the account assigned to the contact will be populated in the Related To.
4. If additional fields are desired, click the Full Form button to use edit view instead.
5. Once the necessary information is entered, click "Save".

Creating Via Duplication

You can also create a new note by duplicating an existing note record. The duplicate option is useful if the note you are creating has similar information to an existing note or if you would like to put the same note on a different account record.
Use the following steps to create a note by duplicating an existing record:

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

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

Note : When duplicating a note with an attachment, the attachment will also be on the new note created via duplication.

Importing Notes

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

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

2. In Step 1, select the source of the data you are importing. Click "Next".
3. In Step 2, select the import file and choose "Create new records only". Click "Next".
4. In Step 3, confirm the import file properties. Click "Next".
5. In Step 4, confirm the field mappings for the import. Click "Next".
6. In Step 6, view the import results.
   ○ The Created Records tab will show all of the new note records.

   ○ The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.

   ○ The Errors tab will show records that were not imported due to errors detected during import.

Note : You can not import attachments during this process, only note records themselves can be imported.

Viewing Notes

There are various options available for viewing notes records in Sugar including via Notes list view, Notes detail view, Notes Last Viewed menu, dashlets, and reports. Please note that you will only be able to see note records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentations in the Administration guide.

Viewing Via List View

The Notes list view displays all note records meeting the current search criteria. To access the list view, simply click the Notes module tab. While list view shows key note fields, you can click the note's subject to open the record in detail view. For more information on viewing notes via list view, please refer to the Notes List View section of this documentation.

Viewing Via Detail View

The Notes detail view displays thorough note information including all note fields followed by subpanels of the note's related records belonging to various modules. The detail view can be reached by clicking a note record's link from anywhere in the application including from the Notes list view. For more information on viewing notes via detail view, please refer to the Notes Detail View section of this documentation.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which notes you have recently viewed. Hover on the Notes Module Tab to see a list of your most recently viewed notes and click each name to open the note in detail view.

Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets which allow users to get a quick view of various records, activities, reports, etc. You can view note information in note-based dashlets such as "My Notes". Clicking a note's subject from any dashlet will open the note in detail view. For more information on using dashlets and viewing note records via dashlets, please refer to the Modules section of the Home documentation.

Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding notes and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the note record's detail view by clicking the note's subject in the report results. Please note that you can only directly access note detail views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the [Reports](#) documentation.

Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

Searching Notes

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

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

Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.
The buttons and checkboxes available in Basic Search panel have the following functions:

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

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

Advanced Search

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

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

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

Global Search

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

To use global search, you need to first enter the keyword into the search box. With Full Text Search enabled, pop-up results will begin appearing once you input three or more characters. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. When Full Text Search is not enabled, results starting with your keyword will appear after clicking the magnifying glass icon or hitting your Return/Enter key. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to t he Studio documentation as well as the Search section of the System documentation in the Administration guide.

Notes List View

The Notes list view displays all note records meeting the current search criteria and to which your user has access. You can view the basic details of each note within the field columns. Please note that you will only be able to see note records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentations in the Administration guide.

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

Pagination

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

results.

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

Checkbox Selection

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

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

Actions Menu

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

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

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

Favorite Designation

Users have the option to mark note records as favorites via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Notes module tab. In the Notes list view, the star on the left of each note's row is yellow once marked to indicate a favorite note. For more information on how to mark records as favorites, please refer to the Favoriting Notes section of this documentation.

More Information

Additional details for each note can be viewed by clicking the "i" icon to the far right of each list view row. This provides users a quick view of additional note

information in addition to what appears in the display column fields. The resulting pop-up window will show the Team and Note fields by default. The list of fields appearing here may only be configured through a code-level customization.

Column Sorting

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

Notes Detail View

The Notes detail view displays thorough note information including all note fields which are grouped by default into the Overview and Other panels. The detail view can be reached by clicking a note record's link from anywhere in the application including from the Notes list view.
Please note that you will only be able to view a note record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentations in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the

[Studio](#) documentation in the Administration guide.

Actions Menu

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

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

Menu Item	Description
[Edit](#)	Edit this note
[Duplicate](#)	Duplicate this note
[Delete](#)	Delete this note

Favorite Designation

Users have the option to mark note records as a favorite via the detail view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Notes module tab. In the Notes detail view, the star on the right of the note's subject is yellow once marked to indicate a favorite note. For more information on how to mark records as favorites, please refer to the [Favoriting Notes](#) section of this documentation.

2013-03-Expense Report ⭐

Edit ▾

⌃ Overview

Contact: Phillip Fry

Subject: 2013-03-Expense Report

Next or Previous Record

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

Prune Database on 1st of Month ⭐

Edit ▾   ⟨ (2 of 12) ⟩

Editing Notes

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

Process Workflow Tasks » Edit

Save Cancel

Job Name: *	Process Workflow Tasks
Job:	Process Workflow Tasks ⇕
Advanced Options:	☐
Interval: *	Every 1 ⇕ ☑ Every Day ☑ Thursday
	Minutes ⇕ ☑ Monday ☑ Friday
	☑ Tuesday ☑ Saturday
	☑ Wednesday ☑ Sunday

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

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

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

Editing Via Detail View

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

Editing Via List View

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

Editing Via Dashlets

You can edit notes by clicking the pencil icon to the far right of any note-based dashlet on your Sugar home page. For example, clicking the pencil icon within the My Notes dashlet will open a pop-up window with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. For more information on dashlets, please refer to the [Home](#) documentation.

Editing Via Reports

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

Deleting Notes

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

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

Deleting Via Detail View

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

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

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

Mass Deleting Via List View

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

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

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

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

Exporting Notes

Sugar's Export option allows users to download all fields for the selected notes to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use note data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered notes

back into Sugar. For more information on updating existing records via import, please refer to the [Import](#) documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of note records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

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

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

Mass Updating Notes

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

recommend selecting the records in smaller batches.

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

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

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

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

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

Favoriting Notes

Each Sugar user has the option to designate their own favorite notes which are important or will be viewed often so that they can easily be accessed via search or from the Notes module tab. Once records are marked as favorites, use the My Favorites checkbox in the Notes Basic or Advanced Search to retrieve your favorites or select from your most recent favorites directly from the Notes Module Tab .

Favoriting Via List View

Use the following steps to mark records as favorites via the Notes list view:

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

Favoriting Via Detail View

Use the following steps to mark records as favorites via the Notes detail view:

1. Navigate to a note record's detail view.
2. Click the star icon to the right of the note's subject in the upper left of the detail view to designate it as a favorite.
3. To remove the note as a favorite, click the star again to revert it to white.

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

Targets

Overview

Sugar's Target module is intended to store potential prospects that have not yet been qualified as leads. Information (e.g. name, email address) regarding these targets is normally acquired from business cards, industry lists, or similar resources. Targets in Sugar are stand-alone records as they are not related to contacts, leads, accounts, or opportunities.

There are various ways you can create targets in Sugar such as via the Targets module, importing targets, etc. Once the target record is created, you can view and edit information pertaining to the target via the Targets detail view. This documentation will cover the basics of the Targets module as well as the various options available in performing the actions related to the module.

Target Fields

The Targets module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the

fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the [Studio](#) documentation in the Administration guide.

Field	Description
Account Name	The account to which the target belongs
Alternate Address	The target's alternate address (e.g. billing or shipping)
Assigned To	The Sugar user assigned to the target
Assistant	The name of the target's assistant within his or her company
Assistant Phone	The assistant's phone number
Birthdate	The target's date of birth
Date Created	The date the target record was created
Date Modified	The date the target record was last modified
Department	The target's department within their company
Description	A description or other information about the target
Do Not Call	Indication that the target should not be called
Email Address	The target's email address
Email Opt Out	Indication that the target has opted out of receiving emails
Fax	The target's fax number
First Name	The target's first name
Home	The target's residence number
Last Name	The target's last name
Mobile	The target's mobile number
Name	When viewing, the target's full name
Office Phone	The target's office number
Other Phone	The target's alternate phone number
Primary Address	The target's primary address
Salutation	Standard greeting for the target (e.g. Mr., Ms., Mrs., etc.)

Teams	The Sugar team(s) assigned to the target record
Title	The target's business title

Targets Module Tab

The Targets module tab is typically located under the More tab of the navigation bar at the top of any Sugar screen. Sugar normally displays the top six modules shown in the Display Modules list of your user preferences, so the remaining displayed modules are grouped under the More tab. For more information on displayed modules for the navigation bar, please refer to the User Preferences section of the Getting Started documentation. Click the tab to access the Targets list view. You may also hover on the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of targets you last viewed in the module. The Favorites Menu displays the list of targets you most recently marked as favorites in the module.

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

Menu Item	Description
Create Target	Opens the edit view layout to create a new target
View Targets	Opens the list view layout to search and display targets
Import Targets	Opens the import wizard to create or update targets using external data

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

- The top navigation bar may be filtered based on a specific tab grouping (e.g. Activities, Reports, etc.) of which the Targets module is not a member. Click the More tab (last tab on navigation bar) then hover on "Filter Menu By" to

check how the navigation bar is grouped. For more information on tab grouping, please refer to the [User Interface](#) documentation.

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

Creating Targets

There are various methods for creating targets in Sugar including via the Targets module, quick create, duplication, and importing targets. The full edit view layout opens when creating the target directly from the Targets menu and includes all of the relevant fields for your organization's targets. The quick create form is a shortened version of the targets edit view and typically contains fewer fields. Both the Edit View and Quick Create layouts can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the documentation in the Administration guide.

Creating Via Targets Module

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

1. Hover on the Targets module and select "Create Target".

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

Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also quick create a target from any Targets subpanel on related module records.

Please note that the Targets module may not be available in the Quick Create menu as it could be disabled for quick create. Reach out to your Sugar administrator to have the Targets module enabled for quick create via Admin > Configure Navigation Bar Quick Create. For more information on enabling and disabling modules for the Quick Create menu, please refer to the [Developer Tools](#) documentation.

Use the following steps to create a target via Quick Create:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Target" or select "Create" on any Targets subpanel on a related module's detail view.
   From Quick Create menu:

   From subpanel:

2. Enter appropriate values in the [fields](#) in the quick create form. All required

fields are marked with a red asterisk and must be completed prior to saving.

3. If additional fields are desired, click the Full Form button to use edit view instead.
4. Once the necessary information is entered, click "Save".

Creating Via Duplication

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

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

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

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

Importing Targets

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

Use the following steps to import targets via the Import Targets option:

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

2. In Step 1, select the source of the data you are importing. Click "Next".
3. In Step 2, select the import file and choose "Create new records only". Click "Next".
4. In Step 3, confirm the import file properties. Click "Next".
5. In Step 4, confirm the field mappings for the import. Click "Next".
6. In Step 6, view the import results.
   - The Created Records tab will show all of the new target records.
   - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
   - The Errors tab will show records that were not imported due to errors detected during import.

Viewing Targets

There are various options available for viewing target records in Sugar including via Targets list view, Targets detail view, Targets Recently Viewed menu, dashlets, and reports. Please note that you will only be able to see target records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide.

Viewing Via List View

The Targets list view displays all target records meeting the current search criteria. To access the list view, simply click the Targets module tab. While list

view shows key target fields, you can click the target's name to open the record in detail view. For more information on viewing targets via list view, please refer to the Targets List View section of this documentation.

Viewing Via Detail View

The Targets detail view displays thorough target information including all target fields followed by subpanels of the target's related records belonging to various modules. The detail view can be reached by clicking a target record's link from anywhere in the application including from the Targets list view. For more information on viewing targets via detail view, please refer to the Targets Detail View section of this documentation.

Viewing Via Recently Viewed

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

Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets which allow users to get a quick view of various records, activities, reports, etc. You can view target information in dashlets based on other modules such as "My Calls". Clicking a target's name from any dashlet will open the target in detail view. For more information on using dashlets and viewing target records via dashlets, please refer to the Modules section of the Home documentation.

Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding targets and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the target record's detail view by clicking the target's name in the report results. Please note that you can only directly access target detail views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the [Reports](#) documentation.

Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide.Check with your system administrator if you cannot access the Reports module.

Searching Targets

The Targets list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Targets list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how

wildcards are used in the different methods, please refer to the [Search](#) documentation.

Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic search panel, you can click "Advanced Search" to access additional search functionality as needed.

The buttons and checkboxes available in the Basic Search panel have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Items : Select this box to return only records assigned to you.
- My Favorites : Select this box to return only records you have marked as favorites.

Search Targets

| Name | | My Items ☐ | My Favorites ☐ | Search | Clear | **Advanced Search** |

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Items" and enter in a target name to search, Sugar will only return the target records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the [list view](#) below the search panel. To see all target records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see target records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#)documentation.

Administrators can configure what fields appear on the Targets Basic Search via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Advanced Search

Advanced Search offers a more in-depth search experience than Basic Search

including additional fields, layout options, and saved search capability. From the Advanced search panel, you can click "Basic Search" for simplified searching.

The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Favorites : Select this box to return only records you have marked as favorites.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the Layout Options section of the Search documentation.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section of the Search documentation.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Favorites" and enter in a target name to search, Sugar will only return the target records with a matching name that are marked as favorites. When searching by a multiselect or dropdown field (e.g. "Assigned to"), however, Sugar will return records matching any of these selections. Once the search completes, the relevant results will populate in the list view below the search panel. To see all target records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see target records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation.

Administrators can configure what fields appear on the Targets Advanced Search via Admin > Studio. For more information on editing layouts, please refer to the

Studio documentation in the Administration guide.

Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search may be used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.

To use global search, you need to first enter the keyword into the search box. With Full Text Search enabled, pop-up results will begin appearing once you input three or more characters. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. When Full Text Search is not enabled, results starting with your keyword will appear after clicking the magnifying glass icon or hitting your Return/Enter key. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

Targets List View

The Targets list view displays all target records meeting the current search criteria to which your user has access. You can view the basic details of each target within the field columns. Please note that you will only be able to see target records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

You have the option to change what fields are displayed in list view by configuring your layout options available in Targets Advanced Search. For more information on

configuring your list view, please refer to the [Layout Options](#) section of the Search documentation. Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Pagination

List view displays the current search results broken into pages that you can scroll through rather than potentially displaying thousands of rows at once. To the right just below the search panel you can see which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of your current results.

By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.

Checkbox Selection

You can perform several actions on target records directly from the list view by first selecting the desired records. To select individual target records on the Targets list view, mark the checkbox on the left of each row. To select or deselect multiple target records on the list view, use the options in the checkbox dropdown menu.

- Select This Page : Selects all records shown on the current page of target results.
- Select All : Selects all records in the current search results across all pages of target results.
- Deselect All : Deselects all records that are currently selected.

Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.

The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Delete	Delete one or more targets at a time
Email	Email one or more targets at a time
Mass Update	Mass update one or more targets at a time
Add to Target List	Add one or more targets to a target list
Export	Export one or more targets to a CSV file

Favorite Designation

Users have the option to mark target records as favorites via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Targets module tab. In the Targets list view, the star on the left of each target's row is yellow once marked to indicate a favorite target. For more information on how to mark records as favorites, please refer to the Favoriting Targets section of this documentation.

More Information

Additional details for each target can be viewed by clicking the "i" icon to the far right of each list view row. This provides users a quick view of additional target information in addition to what appears in the display column fields. The resulting pop-up window will show the Primary Address, Mobile, Home, Other Phone, Email Address, and Description fields by default. The list of fields appearing here may only be configured through a code-level customization .

Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time. You can also set a default order-by column using the layout options in Advanced Search. For more information on setting a default column sort, please refer to the Layout Options section of the Search documentation.

Targets Detail View

The Targets detail view displays thorough target information including all target fields which are grouped by default into the Overview, More Information, and Other panels. You can also view a target's related records (Activities, History, Campaigns) which appear in subpanels beneath the target fields. The detail view can be reached by clicking a target record's link from anywhere in the application including from the Targets list view.

Please note that you will only be able to view a target record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Actions Menu

The Actions menu on the top left of each target's detail view allows you to perform various actions on the current record. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the System documentation in the Administration guide.

The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Edit	Edit this target
Duplicate	Duplicate this target
Delete	Delete this target
Get Data	Search, view, and merge additional lead data via Hoover's and/or Zoominfo connector
Convert Target	Convert this target to a lead
Manage Subscriptions	Manage this target's newsletter campaign subscriptions

Favorite Designation

Users have the option to mark target records as a favorite via the detail view as well as the list view. This allows users to designate records that are important or will be viewed often as they can easily be accessed via search or from the Targets

module tab. In the Targets detail view, the star on the right of the target's name is yellow once marked to indicate a favorite target. For more information on how to mark records as favorites, please refer to the [Favoriting Targets](#) section of this documentation.

Next or Previous Record

On the upper right of the Targets detail view, there are two buttons that allow you to page through each target in the Targets list view's current search results. Clicking the Previous button displays the previous target of the current search results while clicking the Next button displays the next target of the current search results. The text in between shows which target result you are currently viewing within the total number of current results.

Subpanels

Beneath a target record's fields are subpanels containing related records from various modules and campaign interaction history for this target.

Related Record Subpanels

Modules in Sugar display subpanels, which allow users to view related records from other modules. Users can view the details of the related record as well as relate new or existing records via the subpanel. Administrators can easily modify the fields (e.g. Name, Assigned User, etc.) displayed on these subpanels as well as the label of each subpanel through Admin > Studio so that users have visibility to the most important fields for their organization. For more information on working with related record subpanels, please refer to the [Subpanels](#) section of the User Interface documentation.

Activities and History Subpanel

The Activities subpanel lists open or upcoming tasks, calls, and meetings that are related to the target record. Once the activities have taken place or are completed, they will instead appear within the History subpanel. The History subpanel also includes notes and emails associated with the target record. For more information on the history and activities subpanel, please refer to the User Interface documentation.

Campaign Log Subpanel

The Campaign Log subpanel contains historical information regarding a target record's interaction with all Sugar campaigns. When a mass marketing campaign is sent to a target (or manually marked as sent in the case of non-email campaigns), the related campaign activity information will appear within the Campaigns subpanel. This information mirrors the "View Status" page available from within each individual campaign and shows activities such as when a campaign was sent, when the target viewed the campaign message, when the target clicked a tracked link within the campaign, etc. Since this subpanel contains historical campaign interactions for the target, it cannot be used to associate a target with a campaign or otherwise manage a campaign or target list. For more information on associating a target with a campaign, please refer to the Adding Targets to a Target List section of this documentation. For more information on campaigns, please refer to the Campaigns documentation.

Editing Targets

Targets may be edited at any time to update or add information to the record. You can make changes to existing target records via the Targets edit view and quick create forms. Edit view is available within the Targets module and includes all of the Target fields you should need.

Quick create is available for editing targets from outside the Targets module and opens in a pop-up without navigating away from your current page. It generally contains fewer fields, but the Full Form button may be used to access the full edit view should you need to edit additional fields.

Please note that your ability to edit targets in Sugar may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure both the Targets edit view and quick create

via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#)documentation in the Administration guide.

Editing Via Detail View

You can edit targets via the [detail view](#) by clicking the Edit button on the upper left of the page. Once the edit view layout is open, you can update the necessary fields, then click "Save" to preserve the changes made.

Mr. Sam Anderson ☆

| Edit ▼ |

⌃ Overview

Name: Mr. Sam Anderson

Title: Sale Manager

Editing Via List View

You can edit targets via the [list view](#) by clicking the Pencil icon to the left of each target's name. A pop-up window will open with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes.

	Name ⇕	List Order ⇕
✎	Support Agreement	4

Editing Via Reports

Sugar reports also allow you to edit a target record by clicking on the pencil icon next to a target's name. This opens a pop-up window with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. Please note that you may only directly edit targets from Rows and Columns-type or Summation with Details-type reports as Summation-type and Matrix-type reports do not include the pencil icon. For more information on reports, please refer to the [Reports](#) documentation.

Name: Accounts Report
Modules: Accounts, Accounts > Email Address
Display Columns: Name, Email Address
Schedule: None
Filters: None

Type: Rows and Columns Re|
Teams: Global
Assigned to: Max Jensen

(1 - 42 of 42)

Name ⇕	Email Address ⇕
Evermore Company 🖊	evermore@example.com

Deleting Targets

If a target record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Targets detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting target records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

Please note that your ability to delete targets in Sugar may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

Deleting Via Detail View

Use the following steps to delete a target record via the detail view:

1. Navigate to a target record's detail view.
2. Select "Delete" from the Actions menu.

3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Mass Deleting Via List View

Use the following steps to delete one or more target records via the list view:

1. Navigate to the Targets list view by clicking the Targets module tab.
2. Use the [Basic](#) or [Advanced Search](#) to find the Target records you wish to delete.
3. Select the desired target records individually or using the [checkbox dropdown's](#) options.
4. Choose "Delete" from the Actions menu.

5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Due to PHP memory limitations on the server, there may be occasions when the application times out while deleting a large number of target records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Converting Targets

Sugar enables you to convert targets into leads as you determine they qualify for your organization's definition of a lead (e.g. after an evaluation/qualification process) and becomes a valid sales prospect. Please note that targets are only converted into leads in Sugar, and the new lead record will have a relationship to the original target record. Once the lead is qualified as a sales opportunity, they can be converted into contacts, opportunities, and accounts. For more information on lead conversions, please refer to the [Leads](#) documentation.

Steps to Convert a Target

Once the target has been evaluated and qualified, they are ready to be converted to a lead in Sugar.
The following steps cover converting a target to a lead as an example:

1. Navigate to a target record's detail view.

2. Select "Convert Target" from the Actions menu.

3. Enter appropriate values for the fields in the Leads edit view layout then click "Save".
    ○ Since targets only convert to a lead, the Leads edit view displays all lead fields which are grouped by default into the Overview, More Information, and Other panels. Administrators have the ability to determine what fields are displayed on the Leads edit view via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

Once the conversion is complete, the target record will display the converted lead

name at the top of the detail view page. You can click the records name to view the detail of the converted lead.

Mr. Adam Moore ☆

Converted Lead Mr. Adam Moore

Edit ▼

Exporting Targets

Sugar's Export option allows users to download all fields for the selected targets to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Target data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered targets back into Sugar. For more information on updating existing records via import, please refer to the Import documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of target records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Targets may be exported from the Targets list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for targets and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.

☐ ▼	Delete ▼	Selected: 3
Export	ne ⇕
☑	✎	**Support Agreement**
☑	✎	**Standard Agreement**
☑	✎	**Service Agreement**

Please note that your ability to export targets from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

Downloading a Target's vCard

vCards are electronic business cards that are exchanged through applications such as email and web browsers. You can download a vCard from Sugar in order to transfer the target's information to another application.

The following steps cover downloading a vCard and saving it as a contact in Microsoft Outlook as an example:

1. Navigate to a target record's detail view.
2. Click the vCard icon to the right of the target's name to download the vCard file.

   Mr. Adam Moore ☆

   Edit ▼

   ⌃ Overview
   Name: Mr. Adam Moore

3. Open the downloaded file in your mail or address book application. For this example, double clicking opens the vCard in Outlook.
4. Make any necessary changes to the information, then click "Save & Close" to save this target in Outlook.

   Save & Close Delete E-mail Meeting IM

   ☐ Tracy Bright
   Mgr Operations
   Office, Department, South

   General   Organization   Details

   Phone ⊕
   Mobile ⇕ (788) 878-5583
   Work ⇕ (889) 699-4723
   Home ⇕ (388) 715-2572

Mass Updating Targets

Mass Updating allows users to make the same change to multiple target records at once from the Targets list view. Users with administrator or developer level access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide. Due to the PHP memory limitations on the server, t here may be occasions when the application times out while mass updating a large number

of target records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Please note that your ability to mass update targets may be restricted by a role. For more information on roles, please refer to the [R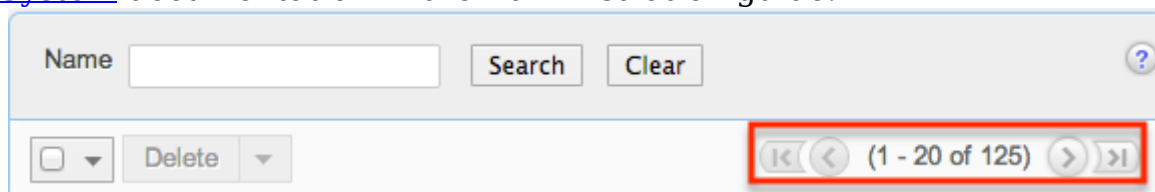ole Management](#)documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

Use the following steps to mass update target records from the list view:

1. Navigate to the Targets list view by clicking the Targets module tab.
2. Use the list view's [Basic](#) or [Advanced Search](#) to identify targets you wish to modify.
3. Select the desired targets individually or using the [checkbox dropdown's](#) options.
4. Choose "Mass Update" from the Actions menu.

5. Scroll to the Mass Update panel and set values for the fields you wish to alter. Note: For the Teams field, use "Replace" to remove existing team assignments before adding those specified here. Use "Add" to add the teams specified here to any existing team assignments.

6. Click "Update" to save the changes to all of the currently selected target records.

Favoriting Targets

Each Sugar user has the option to designate their own favorite targets which are important or will be viewed often so thatthey can easily be accessed via search or from the Targets module tab. Once records are marked as favorites, use the My Favorites checkbox in the Targets [Basic](#) or [Advanced Search](#) to retrieve your favorites or select from your most recent favorites directly from the [Targets module tab](#).

Favoriting Via List View

Use the following steps to mark records as favorites via the Targets list view:

1. Navigate to the Targets list view by clicking the Targets module tab.
2. Use the [Basic](#) or [Advanced Search](#) to find the Target records you wish to mark as favorites.
3. Mark the star icon on the left of each desired target's row.
4. To remove the target as a favorite, click the star again to revert it to white.

Favoriting Via Detail View

Use the following steps to mark records as favorites via the Targets detail view:

1. Navigate to a target record's detail view.
2. Click the star icon to the right of the target's name in the upper left of the detail view to designate it as a favorite.
3. To remove the target as a favorite, click the star again to revert it to white.

Emailing Targets

Sugar allows users to compose and send outbound emails to targets. There are various ways to send outbound mail to targets including emailing via the Emails module, Emails quick compose, Targets module, campaigns, and workflows. Please note that administrators in Sugar must first configure the outbound mail server for the system via Admin > Email Settings in order for users to send outbound emails. For more information on setting up the system email settings, please refer to the documentation in the Administration guide. Users will also need to have their email settings configured in their user preferences prior to sending outbound email from the Emails module, Emails quick compose, or Targets module. For more information on setting up your user preferences' email settings, please refer to the

Emailing Via the Emails Module

Use the following steps to compose and send an email to a target via the Emails module. For more detailed information on sending emails via the Emails module, please refer to the [Emails](#) documentation.

1. Navigate to the Emails module by clicking the Emails module tab.
2. Click the Compose button on the upper left of the Emails module.

3. For the "Related To" field, select "Target" as the module then enter or select the desired target's name. The email's To field will automatically populate with the name and email address of the selected target record.
4. Enter a subject and body for the email message, then click "Send".

Once the email is sent successfully, the email record will appear in the History subpanel of the target record.

Emailing Via Quick Compose

The quick compose option allows users to compose emails from various places in Sugar without navigating away from the current page.

While viewing a target record, you can select "Send Email" from the Quick Create menu on the top right of any Sugar page. Quick creating an email while viewing a target record's detail view automatically populates the To field with the target's name and email address as well as relating the email to the target record.

Users can also use Quick Compose by clicking a target's email address anywhere it is displayed as a link. Clicking the email address automatically populates the To field with the target's name and email address as well as relating the email to the target record.

Quick Compose is also available from the Activities subpanel in a target's detail view. Choosing "Compose Email" from the Actions menu automatically populates the To field with the target's name and email address as well as relating the email to the target record.

Once the email is sent successfully, the email record will appear in the History subpanel of the target record. For more detailed information on sending emails via quick compose, please refer to the Emails documentation.

Emailing Via Targets List View

One or more targets may be emailed at a time from the Targets list view. For more information on sending emails via the Targets list view, please refer to the Emails documentation.

Use the following steps to compose and send an email from the Targets list view:

1. Navigate to the Targets list view by clicking the Targets module tab.
2. Use the Basic or Advanced Search to find the Target records you wish to include on the email.
3. Select the desired targets individually or using the checkbox dropdown's options.
4. Select "Email" from the Actions menu.

5. In the Quick Compose email template, enter in the subject and body of the email message, then click "Send".
   The To field will be automatically populated with the name and email address of the selected target record(s).

Once the email is sent successfully, the email record will appear in the History subpanel of the target record(s).

Emailing Via Campaigns

Sugar's Campaigns module can be used to create email and newsletter campaigns to send mass emails to a relevant set of targets. Email-type campaigns are mass emails sent to a target list while newsletter-type campaigns are a series of mass emails sent to a consistent or growing target list periodically or on a regular basis. For more information on sending mass emails to targets via a campaign, please refer to the Email Campaign section of the [Campaigns](#) documentation.

Emailing Via Workflows

Sugar's Workflow module enables you to automate tasks, send email alerts, and execute various actions. With each workflow, a set of conditions trigger a combination of actions and email alerts potentially including alerts to target records. You also can create alert email templates used by workflows to insert relevent data to the automated email notifications. For more information on workflow email notifications, please refer to the [Email Alert](#)section of the Workflows documentation.

Adding Targets to a Target List

A target list consists of a group of individuals or organizations you want to be included or excluded on a mass marketing campaign. These targets are typically identified based on a set of predetermined criteria such as being a prospect or existing customer, age group, industry, etc. There are various ways to add targets to a target list in Sugar including using the Add to Target List option from the Target list view's Actions menu. For more information on target lists and the other methods of adding targets, please refer to the [Target Lists](#) documentation. Due to the PHP memory limitations on the server, t here may be occasions when the application times out while adding target records to a target list.If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

The following steps cover adding target records to a target list via the Targets list view as an example:

1. Navigate to the Targets list view by clicking the Targets module tab.
2. Use the [Basic](#) or [Advanced Search](#) to find the Target records you wish to add to a target list.
3. Select the desired target records individually or using the [checkbox dropdown's](#) options.
4. Choose "Add to Target List" from the Actions menu.

5. Locate and select the desired target list in the pop-up window or click "Create Target List" to add to a new target list.

In order to view the targets that have been added, you can navigate to the Target Lists module. Click the target list's name to enter the detail view, and you will see the target records within the Targets subpanel.

Connectors

Connectors in Sugar allow the system to connect existing target records in Sugar to external applications such as Hoovers and Zoominfo. Users can search, view, and merge additional data for the target from the specific data source by selecting "Get Data" from the Actions menu of the Targets detail view. For more information on utilizing the connectors to get data, please refer to the [Get Data](#) section of the User Interface documentation. Please note that the Hoovers and Zoominfo connectors are not enabled by default for the Targets module. Administrators must first enable the connectors via Admin > Connectors in order for the Get Data option to appear in the Actions menu. For more information on enabling connectors, please refer to the [Enabling Connectors](#) section of the System documentation in the Administration guide.

Managing Target Subscriptions

Targets who receive newsletter-type campaign emails from your Sugar instance are considered subscribers to that newsletter. Users can manage these newsletter subscriptions from the Targets detail view using the Manage Subscriptions option in the Actions menu. Please note that you can only manage subscriptions for newsletter-type campaigns. A newsletter campaign you have created will have one or more default-type target lists. Targets are added to these target lists in order to receive your newsletter. The Manage Subscriptions option allows you to add a target to the default-type or suppression-type target lists of your newsletter campaigns without leaving the Targets module. For more information on newsletter subscriptions, please refer to the [Campaigns](#) documentation.

Use the following steps to manage target subscriptions via a target's detail view:

1. Navigate to a target record's detail view.
2. Select "Manage Subscriptions" from the Actions menu.

   John Smith ☆

   | Edit | ▾ |

   Duplicate
   Delete
   Get Data
   Convert Target
   Manage Subscriptions

3. To add the target to a newsletter subscription mailing list, select the newsletter from the Available/Newsletters Unsubscribed To list and drag it to the Newsletters Subscribed To list. This will add the target to the campaign's default target list.
4. To remove the target from the newsletter subscription mailing list, select the

newsletter from the Newsletters Subscribed To list and drag it to the Available/Newsletters Unsubscribed To list. This will add them to the suppression-type unsubscription target list for the newsletter campaign, which will prevent the target from receiving the newsletter. Please note that the target will not be removed from the campaign's default target list.

5. Click "Save" to preserve your changes.

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Target Lists

Overview

A target list consists of a collection of individuals or organizations you want to include or exclude in a mass marketing campaign. Target Lists can contain any number and any combination of Targets, Contacts, Leads, Users, and Accounts. Targets can be grouped into a target list according to a set of predetermined criteria such as age group, geographic location, or spending habits. Target lists are used in mass email marketing campaigns that can be configured in the Campaigns

module. For more information regarding creating campaigns please refer to the [Campaigns](#) documentation in the Application guide.

Target Lists Fields

The Target Lists module contains a number of stock fields, which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.

Field	Description
Assigned To	The Sugar user assigned to the target list
Date Created	The date the target list record was created
Date Modified	The date the target list record was last modified
Description	A description or other information about the target list
Name	The name or designation of the target list
Teams	The Sugar team(s) assigned to the target list
Type	The type of the target list (e.g. default, test, etc.)
Domain Name	The name of the domain to exclude from the campaign recipient list (e.g. "example.com")

All email addresses containing the domain name will not receive the campaign email.

Note: This field only displays when "Suppression List - By Domain" is selected for the Type field. |

Target List Types

A target list can specify individuals or organization who need to be included in a

campaign or excluded from a campaign. This can be controlled using the following target list types:

Target List Type	Description
Default	A list of people who are the primary recipients of the campaign email
Seed	A list of people who need to receive the campaign email but not be tracked in the campaign statistics
	Note: This list is typically used for internal purposes where the individuals in this group need to approve the campaign before it is launched. The seed list is ignored in the campaign's View Status page.
Suppression List - By Domain	A list of people who should be excluded from the campaign email recipient list and whose email addresses share a common domain name, such as "website.com"
	Note: Suppression by domain can be used to prevent marketing to entire organizations such as competitors.
Suppression List - By Email Address	A list of people who should be excluded from the campaign email recipient list
	Note: This list typically consists of people who chose to opt out from receiving your campaign message.
Suppression List - By Id	A list of people who should be excluded from a Newsletter-type campaign email recipient list
	Note: The "Suppression List - By Id" must be related to the Newsletter campaign in order for the message's opt-out link to function properly.
Test	A list of people who receive test email campaigns to make sure that the message's layout is displayed properly before the campaign is finalized and

	sent to the default list
	Note: A campaign may be sent to the test list multiple times by using the Delete Test Entries button on the View Status page between re-sends.

Target Lists Module Tab

The Target Lists module tab is typically located under the More tab on the navigation bar at the top of any Sugar screen to the right of the home cube icon. Depending on your settings, you may have to click "Show More" in order to see the Target Lists module tab. Click the tab to access the Target Lists list view. You may also hover on the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The

The options in the Actions menu allow you to perform the following types of action:

Menu Item	Description
Create Target List	Opens the edit view layout to create a new target list
View Target Lists	Opens the list view layout to search and display target lists

If you do not see the Target Lists tab in Sugar, please check the following:

- The top navigation bar may be filtered based on a specific tab grouping (e.g. Activities, Reports, etc.) of which the Target Lists module is not a member. Click the More tab (last tab on navigation bar) then hover your mouse on "Filter Menu By" to check how the navigation bar is grouped. For more information on tab grouping, please refer to the User Interface documentation in the Application guide.
- The Target Lists module may be marked as hidden in your user preferences, which will prevent it from being displayed. You can check by navigating to your user profile (upper right of Sugar), clicking the Advanced tab, and viewing the modules displayed under the Layout Options section. If you see

the Target Lists module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the [Layout Options](#) section of the Getting Started documentation in the Application guide.

- The administrator may have disabled the Target Lists module system wide. Reach out to your Sugar administrator to have the Target Lists module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the [Developer Tools](#) documentation in the Administration guide.

Creating Target Lists

There are various methods for creating target lists in Sugar including via the Target Lists module, duplication, importing of targets, and from the list view of other modules. The full edit view layout opens when creating the target lists and includes all of the relevant fields for your organization's target lists.

Creating Via Target Lists Module

One of the most common methods of creating a target list is via the Create Target List option in the Target Lists module tab. This opens up the edit view layout, which allows you to enter in all the relevant information for the target list.
Use the following steps to create a target list via the Target Lists module:

1. Hover on the Target Lists module and select "Create Target List".

2. Enter appropriate values for the fields in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".

Alternatively, you can create or select an existing target list from a Campaign's detail view via the Target List subpanel. This will launch the same edit view

mentioned above for creating a target list. For more information on how to select a target list from a campaign, please refer to the [Campaigns](#) documentation in the Application guide.

You can now add records to the target list from the list view of Accounts, Contacts, Leads, and Targets. For more information on how to populate a target list, please refer to the section [Populating Target Lists](#)in this documentation.

Creating Via Duplication

You can also create a new target list by duplicating an existing target list record. The duplicate option is useful if the target list you are creating has similar information to an existing target list since you have less new data to enter. A major advantage to creating a target list via duplication is that the related records on the original target list will also be related to the newly created target list.

Use the following steps to create a target list by duplicating an existing target list record:

1. Navigate to a target list record's detail view.
2. Click the Actions menu and select "Duplicate".

   This opens a new edit view pre-populated with the original target list's values.
3. Update the necessary fields (e.g. Name, Type, Description, etc.) then click "Save".

Creating Via Importing Targets

In Sugar you cannot import a target list, but you can import targets. During the import process of targets you have the option to create a target list that contains the imported targets. Perform an import following the instructions in the [Import](#) documentation in the Application guide. During step 6 of the import process ,you

will have an option to add the targets you just imported to a target list.

For more information regarding how to select a target list during target importing or creating a new target list via target importing please refer to the [Populating Via Importing Targets](#) section in this documentation.

Creating Via Module List View

Sugar gives you the ability to create a target list by selecting pre-existing records from the list view of the Accounts, Contacts, Leads, and Targets modules.

For more information regarding how to populate a target list from the module list view or create a new target list wilhe populating from the module list view, please refer to the [Populating Via Module List View](#) section in this documentation.

Searching Target Lists

The Target Lists module's list view includes Basic and Advanced Search functionality to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant search results will be displayed in the Target Lists list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module.

Note : Global Search is turned off for the Target Lists module by default. For more information on how to enable and disable modules for Gobal Search, please refer to the [System](#) documentation in the Application guide.

Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to pull up all records that include the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used, please refer to the [Search](#)documentation in the Application guide.

Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic search panel, you can click "Advanced Search" to access additional search functionality.

The buttons and checkboxes available in the Basic Search panel are also available in Advanced Search.

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Items : Select this box to return only records assigned to you.
- My Favorites : Select this box to return only records you have marked as favorites.

Schedulers

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Items" and enter in a target list name to search, Sugar will only return the target list records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all target list records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see target list records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentations in the Administration guide.

Advanced Search

Advanced Search offers a more in-depth search experience than Basic Search including additional fields, layout options, and saved search capability. From the Advanced search panel, you can click "Basic Search" for simplified searching. The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Favorites : Select this box to return only records you have marked as favorites.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the Layout Options section of the Search documentation in the Application guide.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section of the

Search documentation in the Application guide.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Favorites" and enter in a target list name to search, Sugar will only return the target list records with a matching name that are marked as favorites. When searching by a multiselect or dropdown field (e.g. "Assigned to"), however, Sugar will return records matching any of these selections. Once the search completes, the relevant results will populate in the list view below the search panel. To see all target list records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see target list records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentations in the Administration guide.

Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, full text search was introduced in Sugar, which allows users to search throughout all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.

To use global search, you need to first enter the keyword into the search box. With full text search, the autocomplete is enabled, so Sugar will start searching the system once you provide three or more characters into the search field and show results in a pop-up search box. If you click the magnifying glass icon or hit Return/Enter, Sugar will look for an exact match based on the keyword entered. For more information on using and configuring Global Search, please refer to the section of the Search documentation in the Application guide.

You can configure some aspects of global search such as what modules you want displayed in the search results etc.
Note : Global Search is turned off for the Target Lists module by default. For more information on how regular users can configure their Global Search, please refer

to the [System](#) documentation in the Application guide.

Viewing Target Lists

There are various options available for viewing target list records in Sugar including via Target Lists list view, Target Lists detail view, and Target Lists Recently Viewed menu.

Viewing Via List View

The Target Lists list view displays all target list records meeting the current search criteria. To access the list view, simply click the Target Lists module tab. While list view shows key target list fields, you can click the target list's name to open the record in detail view. For more information on viewing target list via list view, please refer to the [Target Lists List View](#) section of this documentation.

Viewing Via Detail View

The Target Lists detail view displays thorough target list information including all target list fields followed by subpanels of the target list's related records belonging to various modules. The detail view can be reached by clicking a target list record's link from anywhere in the application including from the Target Lists list view. For more information on viewing target list via detail view, please refer to the [Target Lists Detail View](#) section of this documentation.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which target lists you have recently viewed. Hover on the Target Lists module tab to see a list of your most recently viewed target lists and click each name to open the target list in detail view.

Populating Target Lists

Target list can be populated with targets, contacts, leads, users, and accounts. There are various methods to populating a target list with the different types of targets. Due to the PHP memory limitations on the server, there may be occasions when the application times out while populating a large number of records to a target list. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.
Note : If you have multiple targets with the same email address, Sugar will send the campaign email to only one of the targets, chosen at random. The other email addresses, considered to be duplicates, are suppressed even though they are not on the opt-out list.

Populating Via Individual Selection

The detail view of each target list will display the targets, contacts, leads, users, and accounts subpanels. You can select and add the desired targets directly via these subpanels.
Use the following steps to populate a target list with contacts from the edit view in the Target Lists module:

1. Choose the Select button from the Actions dropdown menu in the Contacts subpanel.

2. In the Contacts popup list view you can perform a search for the contacts you wish to add

3. Select the desired results individually by clicking on the contact name or choose multiple using the checkboxes and click the Select button.

4. Once the contacts have been selected, you will see the contacts within the Contacts subpanel in your target list's detail view.

Populating Via Reports

The detail view of each target list will display the targets, contacts, leads, users, and accounts subpanels. You can select and add the desired targets from an existing report directly to the target list via these subpanels.
Use the following steps to populate a target list with a report of leads from the edit view in the Target Lists module:

1. Choose the Select from Reports button from the Actions dropdown menu in the Leads subpanel.

2. In the Reports popup list view, you will see the list of reports based on the Leads module. Select the report you would like to add to the target list by clicking on the report's name.

3. Once the report has been selected, you will see the lead records from the report results within the Leads subpanel of your target list.
Note : When selecting a report the default runtime filters will be applied and you will not be able to overwrite them when selecting the report.

Populating Via Module List View

You can select records directly from the Accounts, Contacts, Leads, and Targets list views to add them to a target list.
Use the following steps to populate a target list by selecting records rom the list view in the Accounts module:

1. Select the account records to add to the target list by checking them or choosing "Select All" from the checkbox dropdown.
2. Choose "Add to Target List" from the actions dropdown menu.

3. Select your desired target list in the popup window or click "Create Target List" to add to a new target list.

4. If creating a new target list, enter appropriate values for the fields in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
5. Once the necessary information is entered, click "Save".

6. This will return you to the original popup window with the target list you just created in search results.
7. Select the newly created target list and the accounts you selected are now associated with the new target list.
8. You will now see the Account records within the Accounts subpanel of your target list.

Populating Via Importing Targets

In Sugar you cannot import a target list, but you can import targets. Perform an import in the Targets module following the instructions in the Import documentation in the Application guide.
Use the following steps to populate a new or existing target list containing the targets you just imported:

1. On Step 6 of the import process, click the Add to Target List button.

Step 6: View Import Results

Summary

20 records were created

| Undo Import | Import Again | Exit | Add To Target List |

Created Records | Duplicates | Errors

Targets

Email ▾

| Name ⇕ | Title ⇕ |

2. A popup window will open with the option to select an existing Target List to add the targets to.
3. Search and select an existing target list or click the Create Target List button to create a new target list.

| Search | Clear |

Create Target List

Target Lists

| Target List ⇕ | Type ⇕ |

4. If creating a new target list, enter appropriate values for the fields in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
5. Once the necessary information is entered, click "Save".

6. This will return you to the original popup window with the Target List you just created in search results.
7. Select the newly created target list and the targets you imported are now associated with the new target list.

Target Lists List View

The Target Lists list view displays all target list records meeting the current search criteria to which your user has access. You can view the basic details of each target list within the columns of fields. Please note that you will only be able to see target list records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentations in the Administration guide.

Checkbox Selection

You can perform several actions on target list records directly from the list view by first selecting the desired records. To select individual target list records on the Target Lists list view, mark the checkbox on the left of each row. To select or deselect multiple target list records on the list view, use the options in the checkbox dropdown menu.

- Select This Page : Selects all records shown on the current page of target lists results.
- Select All : Selects all records in the current search results including all pages of target lists results.
- Deselect All : Deselects all records that are currently selected.

Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.

The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Delete	Delete one or more contacts at a time
Mass Update	Mass update one or more contacts at a time
Export	Export one or more contacts to a CSV file

Pagination

List view displays the current search results broken into pages that you can scroll through rather than potentially displaying thousands of rows at once. To the right just below the search panel you can see which records of the total results set are currently being displayed. The two single-arrow next and previous buttons can be used to scroll through the records page-by-page. The two double-arrow first and last page buttons allow you to skip to the beginning or the end of your current results.

By default, Sugar displays 20 records per list view page, but administrators can

change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.

Favorite Designation

Users have the option to mark target list records as a favorite via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed on the list view or from the Target Lists module tab. In the Target Lists' list view, the star on the left of each target list's row is yellow once marked to indicate a favorite target list. For more information on how to mark records as favorites via the Taget Lists list view, please refer to the Favoriting Target Lists section of this documentation.

Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields that allow sorting will have a pair of arrows in the column header. The list view may be sorted by only one column at a time. You can also set a default order-by column using the layout options in Advanced Search to specify which field to automatically sort results by in the list view. For more information on setting a default column sort, please refer to the Layout Options section of the Search documentation in the Application guide.

Target Lists Detail View

The Target Lists detail view displays thorough target list information including all target list fields, which are grouped by default into the Overview, and Other panels. You can also view a target list's related records (Targets, Contacts, Leads, etc.), which appear in subpanels beneath the target list fields. The detail view can

be reached by clicking a target list record's link from anywhere in the application including from the Target Lists list view.
Please note that you will only be able to view a target list record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentations in the Administration guide.

Actions Menu

The Actions menu on the top left of each target lists' detail view allows you to perform various actions on the current record. Please note that administrators in Sugar can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on how to configure the actions menu, please refer to the System documentation in the Administration guide.

The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Edit	Edit this target list
Duplicate	Duplicate this target list
Delete	Delete this target list
Export	Export the members of this target list

Related Record Subpanels

Beneath a target list record's fields are subpanels containing the target lists related records belonging to various modules.
The following operations may be performed on or with related record subpanels.

Please note that administrators in Sugar can change the subpanel's Action menu to be displayed as separate buttons instead of a dropdown via Admin > System Settings. For more information, please refer to the [System](#) documentation in the Administration guide.

- To view the details of a related record, click the record's name in the subpanel to open it in detail view.
- To relate an existing record to the target list, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the target list, choose "Create" from the subpanel's Action menu, complete the Quick Create form, and then click "Save".
- To delete the target list's relationship to a record, choose "unlink" from the dropdown on the far left of the record's row. This removes the relationship, but does not delete the record itself.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

Please note that administrators can prevent users from moving subpanels to different locations in the detail view. For more information on preventing rearranging of subpanels, please refer to the [System](#) documentation in the Administration guide. Check with your system administrator if you are not able to rearrange the subpanels.

Next or Previous Record

On the upper right of the Target Lists detail view, there are two buttons displayed that allow you to view and scroll through different target list records. Clicking the Previous button displays the previously viewed target list record's detail view. Clicking the Next button allows you to scroll through the target list record that follows the current one you are viewing.

Favorite Designation

Users have the option to mark target list records as a favorite via the detail view as well as the list view. This allows users to group records that are important or will be viewed often as they can easily be accessed. To add a target list record to your favorite list, click on the star icon to the right of the target list name in the detail view. Once target lists are marked as favorites, you can select "My Favorites" in the Basic or Advanced Search panel to pull up just your favorite target list records. For more information on marking records as favorites via the Target Lists detail view, please refer to the Favoriting Via Detail View section of this documentation.

Editing Target Lists

Target Lists may be edited at any time to update or add information to the record. You can make changes to existing target list records via the Target Lists edit view and quick create forms. Edit view is available within the Taget Lists module and includes all of the Target Lists fields you should need.

Quick create is available for editing target lists from outside the Target Lists module and opens in a pop-up box without navigating away from your current page. It generally contains fewer fields, but the Full Form button may be used to access the full edit view form should you need to edit additional fields.

Please note that your ability to edit target lists in Sugar may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Editing Via Detail View

You can edit target lists via the detail view by clicking the Edit button on the upper left of the page. Once the edit view layout is open, you can update the necessary field values then click "Save" to preserve the changes made.

Editing Via List View

You can edit target lists via the list view by clicking the Pencil icon to the left of each target list's name. A pop-up window will open with the quick create form which is a shortened version of the edit view layout. You can make the necessary updates to field values on the form, then click "Save" to preserve the changes.

Deleting Target Lists

If a target list record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Target Lists detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting target list records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.
Please note that your ability to delete target lists in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete option.

Deleting Via Detail View

Use the following steps to delete a target list record via the detail view:

1. Navigate to a target list record's detail view.

2. Select "Delete" from the Actions menu.

3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Mass Deleting Via List View

Use the following steps to delete one or more target list records via the list view:

1. Navigate to the Target Lists list view by clicking the Target Lists module tab.
2. Use the Basic or Advanced Search to find the Target Lists records you wish to delete.
3. Select the desired target list records individually or using the checkbox dropdown's options.
4. Choose "Delete" from the Actions menu.

5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Exporting Target Lists

Sugar's Export option allows users to download all fields for the selected target lists to their computers in a .CSV format. This may be useful when needing to use target list data with other software such as Microsoft Excel. Target Lists may be exported from the Target Lists list view by selecting "Export" from the Actions menu. For more information on exporting records in Sugar, please refer to the Export documentation in the Application guide.
Please note that your ability to export target lists from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

Exporting Target List Members

In addition to exporting target list records from the Target Lists list view, Sugar allows you to export the members of a target list from the detail view of a target list record. This allows users to download all fields for the members of the selected target list to their computers in a .CSV format.
Use the following steps to export the members of a target list via the target lists detail view:

1. Navigate to a target list record's detail view.

2. Select "Export" from the Actions menu.

Please note that your ability to export target list members from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if the Export option returns an access restriction message.

Mass Updating Target Lists

The Mass Update option allows users to make the same change to multiple records at once. Target list records can be mass updated from the Target Lists list view. Please note that your ability to mass update target lists may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the mass update option.
Use the following steps to mass update target list records from the list view:

1. Navigate to the Target Lists list view by clicking the Target Lists module tab.
2. Use the list view's Basic or Advanced Search to identify target lists you wish to modify.
3. Select the desired target lists individually or by using the checkbox dropdown's options.
4. Choose "Mass Update" from the Actions menu.

5. Scroll to the Mass Update panel and set values for the fields you wish to alter. Note: For the Teams field, use "Replace" to remove existing team assignments before adding those specified here. Use "Add" to add the teams specified here to any existing team assignments.

6. Click "Update" to save the changes to all of the currently selected target list records.

Favoriting Target Lists

Each Sugar user has the option to easily designate their own favorite target lists. Designating target list records as favorites allow you to group records and easily find the target lists most important to you. Once records are marked as favorites, use the My Favorites checkbox in the Target Lists' Basic or Advanced Search to retrieve your favorites or select from your most recent favorites directly from the .

Favoriting Via List View

Use the following steps to mark records as favorites via the Target Lists list view:

1. Navigate to the Target Lists list view by clicking the Target Lists module tab.
2. Use the Basic or Advanced Search to find the Target List records you wish to mark as favorites.
3. Mark the star icon on the left of each desired target lists' row.
4. To remove the target list as a favorite, click the star again to revert it to white.

Favoriting Via Detail View

Use the following steps to mark records as favorites via the Target Lists detail view:

1. Navigate to a target list record's detail view.
2. Click the star icon to the right of the target list's name in the upper left of the detail view to designate it as a favorite.
3. To remove the target list as a favorite, click the star again to revert it to white.

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Campaigns

Overview

Sugar's Campaigns module can be used to create and manage email and non-email marketing and advertisement campaigns for your organization. Email-based campaigns can be used to send mass emails or a series of newsletter emails to individuals with whom you have an active or growing relationship. The results of each campaign are recorded to measure the success of your campaigns.

Campaign Fields

The Campaigns module contains a number of stock fields, which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

Field	Description
Actual Cost	The total cost of the campaign
Assigned To	The Sugar user assigned to the campaign record

Budget	The budgeted amount for the campaign's cost
Currency	The currency of the campaign costs
Description	A description or other information about the campaign
Date Created	The date the campaign record was created
Date Modified	The date the campaign record was last modified
End Date	The date the campaign is expected to end
Expected Cost	The expected cost of the campaign
Expected Revenue	The expected revenue stemming from the campaign
Frequency	For newsletter-type campaigns, the frequency the campaign is expected to be sent
Impressions	The expected number of recipient click-throughs
Name	The name of the campaign record
Objective	The objective or purpose of the campaign
Start Date	The date the campaign is expected to start
Status	The current status of the campaign Note: This field is manually set, not automatic
Teams	The Sugar team(s) assigned to the campaign
Type	The campaign's format or type (e.g. email, web)

Campaigns Module Tab

The Campaigns module tab is typically located under the More tab on the navigation bar at the top of any Sugar screen. Depending on your settings, you may have to click "Show More" in order to see the Campaigns module tab. Click the tab to access the Campaigns list view. You may also hover on the tab to display

the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the campaigns, target lists, and targets you last viewed in the module. The Favorites menu displays the list of campaigns you most recently marked as favorites.

The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Create Campaign (Wizard)	Opens the campaign wizard to create a new campaign
Create Campaign (Classic)	Opens the edit view layout to create a new campaign
View Campaigns	Opens the list view layout to search and display campaigns
View Newsletters	Opens the list view layout to search and display newsletter-type campaigns
Create Email Template	Opens the Email Templates edit view layout to create a new email template
View Email Template	Opens the Email Templates list view layout to search and display email templates
Set Up Email	For users with administrator access, opens the email setup for campaigns wizard
View Diagnostics	Displays your system's configuration status for sending email-based campaigns

Create Lead Form	Opens the Lead Form wizard to generate a web-to-lead form

If you do not see the Campaigns tab in Sugar, please check the following:

- The top navigation bar may be filtered based on a specific tab grouping (e.g. Activities, Reports, etc.) of which the Campaigns module is not a member. Click the More tab (last tab on navigation bar) then hover on "Filter Menu By" to check how the navigation bar is grouped. For more information on tab grouping, please refer to the User Interface documentation.
- The Campaigns module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Campaigns module in the Hide Modules list, simply move it to the Display Modules list and save. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Campaigns module for your entire Sugar instance. Reach out to your Sugar administrator to have the Campaigns module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

Prerequisites

There are several key components involved when executing an email or newsletter campaign in Sugar. Before sending out an email-based campaign, an administrator must make sure the following items are set up properly:

- Outbound Emails : Configure Sugar to send outbound emails via Admin > Email Settings. For more information on configuring outbound email, please refer to Set Up Email below or to the Email documentation in the Administration Guide.
- Campaign Batch Size : Specify the number of emails sent per batch via Admin > Campaign Email Settings. Due to some email providers throttling the number of emails allowed to be sent at one time, we recommend setting this to 200 and adjusting as necessary. For more information on configuring the campaign batch size, please refer to Set Up Email below or to the Email documentation in the Administration Guide.
- Bounce Handling Account : Create the bounce-handling inbox for bounced campaign emails via Admin > Inbound Email. For more information on configuring the bounce handling account, please refer to the Email documentation in the Administration Guide.

- Campaigns Scheduler : Configure the scheduler job that automatically sends campaign emails via Admin > Schedulers > Run Nightly Mass Email Campaigs Scheduler. The frequency of this scheduler should be determined in conjunction with the campaign batch size to ensure you do not exceed sending limitations imposed by your email provider. For more information on configuring schedulers, please refer to the [Schedulers](#) documentation in the Administration Guide.
- Bounced Emails Scheduler : Configure the scheduler job to process the bounced campaign emails via Admin > Schedulers > Run Nightly Process Bounced Campaign Emails Scheduler. For more information on configuring schedulers, please refer to the [Schedulers](#) documentation in the Administration Guide.
  Note: The Run Nightly Mass Email Campaigns and Run Nightly Processed Bounced Campaign Emails schedulers are configured by default to run every night on the hour from 2:00 AM to 6:00 AM for the time zone of the admin user (User Id = 1). For quicker processing of campaign information we recommend changing both schedulers to run every 10 minutes throughout the day. Please note that if your email provider throttles the number of emails allowed to be sent in a given time period, you may need to reduce the frequency of sending.

Set Up Email

In addition to navigating directly to the email settings on the Administration page, you can also configure Sugar's email settings for campaigns via the Set Up Email option in the Campaigns module tab. This launches a wizard that walks through entering all of the relevant information for email set up. This link is only visible to administrator users and only needs to be configured once for the Sugar instance.

Use the following steps to configure email settings via the Campaigns module:

1. Hover on the Campaigns module tab and select "Set Up Email".

2. Enter the appropriate values for your email server. All required fields (e.g. From Name, From Address, SMTP Server, etc.) are marked with a red asterisk and must be completed. Please be aware that any values entered during this step will affect the system-wide email settings located within Admin > Email Settings.

3. Once the necessary information is entered for the Setup Email page, click "Next".

4. Enter the information for your bounce handling email account in the "New Mail Account" screen. If you have already configured a bounce handling account, there will be nothing to populate on this step.

5. Once the necessary information is entered for the New Mail Account page, click "Next".

6. The "Summary" page shows the information entered in the previous steps. Click "Save" to preserve your changes.

Campaign Diagnostic Tool

The campaign diagnostic tool enables you to check if all pending administrative tasks have been completed before you attempt to launch the campaign. We recommend running this tool well in advance of sending out a campaign to ensure plenty of time to get any issues resolved before the campaign emails need to be sent.

Use the following steps to run the campaign diagnostic tool:

1. Hover on the Campaigns module tab and select "View Diagnostics".

2. Sugar will check your instance's email and scheduler configuration and display warnings if additional configuration is necessary. Administrator users will also see links to appropriate sections of the Administration page to correct the issues. If you are not an administrator user, please contact your

administrator to complete these tasks. For more information on these required elements, please refer to the [Prerequisites](#) section above.

4. Once all necessary configurations have been completed, click "Re-Check" to

re-run the campaign diagnostic tool.

Campaign Types

Sugar supports many different types of campaigns. The main types and their differences are as follows:

- Newsletter : A series of mass emails sent to a consistent or growing target list periodically or on a regular basis. Each newsletter is intended to be managed on a subscription basis and is normally targeted towards individuals with whom you have an existing relationship. The Frequency field is only available for campaigns with the type set to "Newsletter". Recipients opting out of newsletter-type campaigns are added to that campaign's unsubscription list but will still be able to receive other campaigns' emails.

- Email Campaign : A one-time or series of mass emails sent to a target list. Email campaigns are typically targeted towards a wide audience with the intention of lead generation. Recipients opting out of email-type campaigns have their email address marked as "opt-out" and are prevented from receiving any future campaign emails.

- Non-email based Campaign : A non-email mass marketing effort delivered via mail, web, radio, television, print, or telesales. These campaigns are not executed through Sugar, but you can create a campaign record and manually

update send dates and results for record keeping and to assess return on investment.

Note : Non-email based campaigns will not display Tracker URLs and Email Marketing subpanels in the detail view.

Creating Campaigns

There are two primary methods for creating a campaign in Sugar: the Create Campaign (Classic) option and the Create Campaign (Wizard) option. When using the classic option, you will create the campaign record then create the required records in each following subpanel on the campaign's detail view. The wizard option will guide you through the process of creating the campaign as well as completing the related tasks. The classic creation option is recommended for simplicity and empowering users to make later modifications to the campaign.

Creating Via Classic Option

Creating a campaign using the classic method opens the Campaigns edit view where you may enter the basic campaign information. Use the following steps to create a campaign via the classic option:

1. Hover on the Campaigns module tab and select "Create Campaign (Classic)".

2. Enter appropriate values for the fields in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.

3. Once the necessary information is entered, click "Save".

Once the campaign record has been created, you will progress down the resulting detail view page to populate the necessary subpanels including Target List, Tracker URLs (if desired), and Email Marketing.

Creating Via Duplication

You can also create a new campaign by duplicating an existing campaign record. The duplicate option is useful if the campaign you are creating has similar information to an existing campaign. When duplicating a campaign, the campaign data and the related target lists will copy over, but the original campaign's tracker URLs and Email Marketing records will not be related to the new campaign.

Use the following steps to create a campaign by duplicating an existing campaign record:

1. Navigate to a campaign record's detail view.
2. Select "Duplicate" from the Actions menu.

3. The displayed edit view is pre-populated with the original campaign's values. Update the necessary fields, then click "Save".

Once the campaign record has been created, you will progress down the resulting

detail view page to populate the necessary subpanels including Target List, Tracker URLs (if desired), and Email Marketing.

Creating Target Lists

A target list consists of a collection of individuals or organizations you want to include or exclude in a mass marketing campaign. Target lists can contain any number and any combination of contacts, leads, targets, users, and accounts. You have the option to associate existing target lists with your new campaign or to create target lists during the campaign creation process.

The target list type determines some specific functionality within the campaign. Target list types are "Default", "Seed", "Suppression List", and "Test". Default- and seed-type target lists will receive emails when campaigns are sent. Test-type target lists will receive emails when campaigns are tested.

Sugar will create some target lists for you by default; for example, when selecting a campaign type of "Newsletter", Sugar automatically generates three target lists for the campaign: default-type "Subscription List", suppression by ID-type "Unsubscription List", and test-type "Test List". Please note that these three target list types are required for the Newsletter campaign. You may add additional target list types to the campaign as necessary. If you wish to remove the system generated target list types (e.g. suppression by ID-type "Unsubscription List"), please keep in mind that you must replace it with the same target list type (e.g. Suppression List - By Id). For more information about target lists, please refer to the Target Lists documentation.

Use the following steps to add an existing target list to your campaign via the Target List subpanel on the Campaign detail view:

1. Navigate to the Target List subpanel.
2. Choose "Select" from the Actions menu.

4. Locate and click the name of the desired target list in the resulting pop-up window. To add several target lists at once, select their checkboxes and click "Select".

Creating Tracker URLs

A campaign email may text or image links in addition to the message's text which, when clicked, open a website, web-to-lead form , or other URL in your recipient's browser. If you choose to create your links as tracker links, then Sugar will log your recipients' clicks by assigning each tracker link a unique key and routing the link through Sugar before loading the final URL in their browser. The click-through results can be reported on and are visible in the Campaign Status section of the Campaigns module. For more information on the Campaign Status page, please refer to the section Campaign Status of this documentation. A specific type of tracker URL is the opt-out link which allows the recipient to opt out of receiving your campaign emails instead of directing them to another web location.

Creating Redirect URLs

Redirect tracker URLs can appear as text or images in your campaign email and, when clicked, will navigate your recipient's browser to the URL of your choice: a page within your organization's website, a targeted advertisement, or even a web-to-lead form where they can provide details that will be saved as a Sugar lead record. For more information on web-to-lead forms, please refer to the Web To Lead Forms documentation. The power of redirect URLs is that on each click they pass through your Sugar instance before arriving at their final destination. This allows the clicks to be tracked by your campaign to provide visibility into how your recipients are responding to the campaign.

Use the following steps to create a redirect URL via your campaign's detail view:

1. Navigate to the Tracker URLs subpanel.
2. Click the Create button to create a new tracker URL.

3. Complete the fields as follows. All required fields are marked with a red asterisk and must be completed:
   Tracker Name : Enter an internal name for the tracker URL.
   Opt-out Link : Leave this box unchecked.
   Tracker URL : Enter the destination URL where recipients will be directed after clicking the link in the email.
4. Click the Save button to complete creating the tracker URL record.

You can now insert this tracker URL into the email template of your choice. For more information on adding redirect URL links to your template, please refer to the [Create Email Template](#) section of this documentation.

Creating Opt-out Links

You can create an opt-out tracker URL to embed an "Unsubscribe" link that recipients may click if they do not wish to receive your campaign. If an opt-out link is not included in the email template, Sugar will add a default opt-out link to the bottom of your campaign email. When targets click on the Opt-out link, Sugar logs the action for your records and the target recieves a message stating they have elected to opt out of receiving emails.

Note : The message returned to targets can be modified by changing the LBL_ELECTED_TO_OPTOUT label via Admin > Studio. For more information on how to modify labels, please refer to the [Studio](#) documentation in the Administration guide.
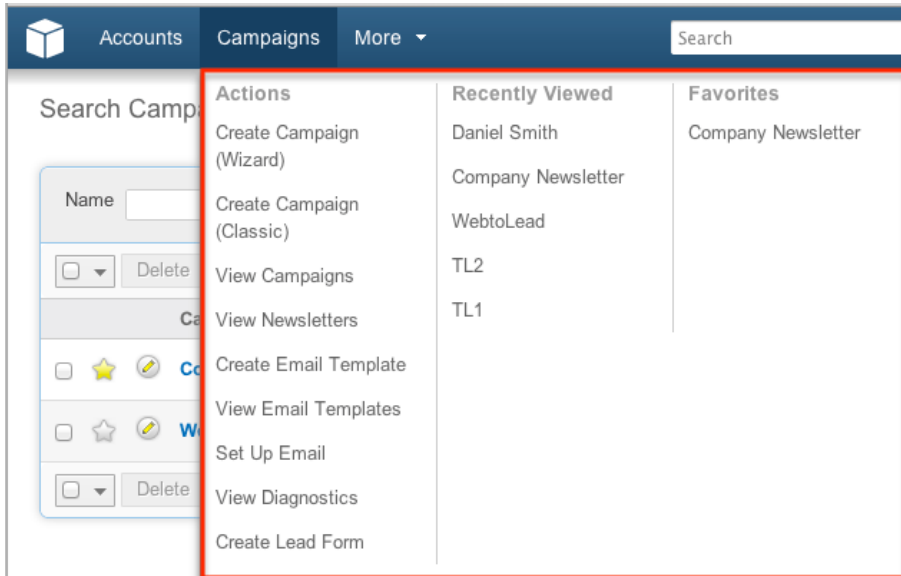
For a newsletter-type campaign, they will also be added to the suppression-type list which prevents them receiving emails from that particular campaign in the future. In the case of an email-type campaign, their Sugar record's email address is marked to prevent them receiving emails from any campaign. You must manually add your opt-out link by inserting the tracker URL into the email template via the Email Marketing record.

Note : Opt-out links for newsletters behave differently than other campaign types. When a target clicks an opt-out for a newsletter type campaign they are removed only from that campaign that sent the email. They are still able to receive email from other campaigns.

Use the following steps to create an opt-out link via your campaign's detail view:

1. Navigate to the Tracker URLs subpanel.
2. Click the Create button to create a new tracker URL.

3. Complete the fields as follows. All required fields are marked with a red asterisk and must be completed:

- Tracker Name : Enter an internal name for the tracker URL.
- Opt-out Link : Mark the checkbox so that this link will be used to allow recipients to opt out.
- Tracker URL : This is defaulted and disabled for opt-out links.

- Click the Save button to complete creating the tracker URL record.

You can now insert this tracker URL into the email template of your choice. For more information on adding an opt-out link to your template, please refer to the Creating Email Templates section of this documentation.

Creating Email Marketing Records

When you create an email campaign, you must also create an Email Marketing record that specifies the body of the message in the form of an email template, which bounce handling account will catch automated replies from invalid email addresses, and which target lists will receive this particular mass email of your campaign.

When you are sending more than once from a single campaign, both

newsletter-type and email-type campaigns will need a new Email Marketing for each subsequent send. For example, a monthly newsletter campaign will have 12 Email Marketing records created in a year, each one with a different email template with the same target lists. Or, if you wish to send an introductory email to all of your newest prospects every 3 months, this email-type campaign will have 4 Email Marketing records created in a year, each one using the same email template but different target lists. Sugar will not allow the same Email Marketing record to be sent to a recipient more than once.

Use the following steps to create an Email Marketing record via your campaign's detail view:

1. Click the Create button to create a new email marketing record.

2. Complete the fields as follows. All required fields are marked with a red asterisk and must be completed:

- Name : Enter an internal name for the email marketing record.
- Status : Select "Active" from the dropdown. Only active Email Marketing records may be sent.
- Start Date & Time : Enter a date and time when the emails needs to begin being sent. This start date and time must have passed before the campaign may be queued for delivery.
- Email Template : Select or create an email template. For more information on creating an email template, please refer to the Creating Email Templates section of this documentation.
- Send This Message To : Check this box to send this email to all target lists that are associated with this campaign or select individual target lists via the multiselect box below.

- Use Mailbox : Select the bounce handling account that will catch automated replies from invalid email addresses.

- From Name : This will automatically populate based on the selected bounce handling account. You can enter a different name that will appear as the email's From name.
- From Email Address : This will automatically populate based on the selected bounce handling account. You can override the field to enter a different email address that the campaign will be sent from. Please note that your system outbound email account may need to grant specific 'Send As' permissions if you wish to use an From email address that differs from the address set up in Admin > Email Settings. If these permissions are not granted, emails may fail to send or the authenticated email account will be imposed in place of the address depending on your mail server settings. Also, if the From address entered is not configured as a bounce handling email address in Sugar, you will not see the results of the bounced emails in your campaign's [Status page] .
- "Reply-to" Name : This will automatically populate if it is provided on the bounce handling account. You can enter a different name that will appear as the email's Reply-to name.
- "Reply-to" Address : This will automatically populate if it is provided on the bounce handling account. You can enter a different address that will appear as the email's Reply-to address.
- Click the Save button to complete the creation of the Email Marketing record.

Create Email Marketing

| Save | Cancel |

| Name: * | Holiday Sales WK1 |

Creating Email Templates

Email templates contain the design and content of the emails your campaign will send. Placeholder variables can be added to the template for field values like the target name so you can personalize the email to your recipients. Creating an email template through the Campaigns module rather than via the Emails module sets the template's type to "Campaign" and allows you to add redirect and opt-out tracker URLs.

Use the following steps to create an email template from the Email Marketing record:

1. While creating or editing your campaign's Email Marketing record, click "Create" below the Email Template dropdown.

2. Enter the appropriate values for the fields in the pop-up window. The required field is marked with a red asterisk and must be completed.
   ○ Name : Enter an internal name for the email template.
   ○ Teams : Select the Sugar team(s) assigned to the email template.
   ○ Type : This will automatically populate as "Campaign".
   ○ Description : Enter a description or other information about the template.
   ○ Subject : Enter the subject of the emails that will be sent.
   ○ Body : Enter the body of the emails that will be sent.
3. Using the TinyMCE functions, add simple formatting to your email's content. For more advanced customization you can click the HTML button in the top left to access and edit the generated HTML code.
   Note: Only inline CSS may be used in email templates. Inline CSS is a method of using CSS within your HTML content instead of storing it in an external CSS file. So, every HTML element must be styled using inline CSS by virtue of

   the "style=" declaration.
4. Click "Save" to preserve your changes to the email template.

Inserting Variables

When constructing the subject and body of your email, Sugar allows you to insert variables, or placeholders, into the template that will be populated with the record's information for that variable. Use the following steps to insert a variable for the recipient's first name into the template:

1. Click to place your cursor on the location in the subject or body where the recipient's first name should appear.

2. In the Insert Variable row, the first dropdown defaults to "Contact/Lead/Target" to specify you'd like to insert a field from the associated person-type recipient's record.

3. Set the second dropdown to the desired field from the modules selected in the first dropdown. For our example, select "First Name".

4. Click "Insert" to insert the generated variable name to your subject or body at your cursor's location.

Inserting Tracker URLs

When constructing the body of your email, Sugar also allows you to insert redirect or opt-out tracker URLs. Use the following steps to insert a tracker URL or opt-out link into the template.

1. Click to place your cursor on the location in the body where the link should appear.

2. Select the link you wish to add from the Insert Tracker URL dropdown. For more information on creating tracker URLs, please refer to the [Creating Tracker URLs](#) section.

3. Type the text you wish to appear as a link between the curly braces in the following text box.

4. Click the Insert URL Reference button to place the link in the body of the email at the location of your cursor.

Testing Campaigns

Before you launch an email or newsletter campaign, it is recommended that you perform tests to check how different email clients display the campaign message.

A test-type target list must be selected under the Target Lists subpanel as well as in the Email Marketing record in order to test the campaign.

Note that in test mode, the system disables your suppression lists allowing the campaign message to be sent to targets on your suppression-type target lists. The system also disables checks for duplicate email addresses thereby allowing users to send a message multiple times to the same recipients.

Use the following steps to test an email-based campaign:

1. Navigate to a campaign record's detail view.
2. Select "Send Test" from the Actions menu.

3. Select the Email Marketing record and test target list combination that you would like to test and click "Send".
   Note: If an Email Marketing record does not have a test-type target list associated to it, then the Targeted Lists section will remain empty and no test emails will be sent.

Once the campaign testing is complete be sure to click the Delete Test Entries button on the Campaign Status page of the campaign before sending the campaign to your real recipients. If this is not done, then the statistics from the tests will be included in the campaign's final totals.

Sending Campaigns

Once the Sugar email settings are configured and your campaign has been tested successfully, you are now ready to send the campaign. Upon sending a campaign,

the emails are queued to be sent out in intervals. The administrator can configure how many emails are sent and when to send them. For more information on the relevant configurations, please refer to the [Prerequisites](#) section.

Use the following steps to send an email-based campaign:

1. Navigate to a campaign record's detail view.
2. Select "Send Emails" from the Actions menu.

3. Select the Email Marketing record and target list combination that you would like to test and click "Send".
   Note: If the email marketing record does not have a default-type target list associated to it, then the Targeted Lists section will remain empty and no emails will be sent.

The specified start date and time on the email marketing record must have passed before the campaign will be queued for delivery. Once the emails enter the queue in Admin > Email Queue, the relevant scheduler will send the emails in set batches on an interval configured as configured by an administrator. For more information on the Email Queue, please refer to the [Email](#) documentation in the Administration guide. For more information on the schedulers used by the Campaigns module, please refer to the [Prerequisites](#) section.

Viewing Campaign Status

After you launch a campaign, you can view its results on the Campaign Status page to gauge its impact and progress. The Campaign Status page includes several subpanels, which display information such as the recipients who viewed the

message, the recipients who clicked a tracker URL in the email, as well as how many leads and contacts were created from the campaign. This enables you to evaluate the effectiveness of the campaign.

Use the following steps to view the Campaign Status page:

1. Navigate to a campaign record's detail view.
2. Click the View Status button.

Campaign Status Chart

This is a visual representation of the counts of your recipients' activities which are also detailed in the below subpanels. Use the dropdown to view a particular Email Marketing record's data or choose "--None--" to view the cumulative results of all of this campaign's sends.

Message Queue Subpanel

The Message Queue subpanel shows the campaign emails waiting to be sent in the email queue. The emails will remain in the queue until the start time of the Email Marketing record has passed and the scheduler picks and sends them in batches as specified in Admin > Campaign Email Settings. For more information on batch size, please refer to the Prerequisites section. For more information on monitoring this queue, please refer to the Email documentation of the Administration guide.

Campaign Response Subpanels

The success of a campaign can be determined by analyzing the response statistics. Knowing how many of your targets saw your email, clicked its links, and became leads or contacts, for example, can provide insight for your campaign strategy.

The following subpanels measure different aspects of your recipients' responses to the campaign or a specific send of the campaign based on your selection in the "Filter Chart By" dropdown at the top of the page:

- Message Sent/Attempted : The list of campaign emails that were sent out to targets.
- Viewed Message : The list of targets who viewed the emails that were delivered. Sugar includes a very small, invisible image in each email. Each time the recipient downloads this image, Sugar records that they viewed the email.
- Click-thru Link : The list of targets who clicked on a redirect tracker URL in the email. This does not include opt-outs. For more information on redirect tracker URLs, please refer to the Creating Tracker URLs section.
- Leads Created : The list of leads who have been generated from a web-to-lead form assigned to this campaign record.
- Contacts Created : The list of contacts who have been converted from a lead generated from a web-to-lead form assigned to this campaign record.
- Bounced Messages, Invalid Email : The list of campaign emails that bounced back due to invalid email addresses.
- Bounced Message, Other : The list of campaign emails that failed to send despite having valid email addresses. After six failed attempts, these messages will be removed from the queue.
- Opted Out : The list of targets who chose to opt out of receiving campaign emails by clicking the opt-out link.
  Note : Opt-out links for newsletter-type and email-type campaigns behave differently. When a target clicks an opt-out for a newsletter-type campaign, they are prevented from receiving future emails from that specific campaign by being added to the campaign's suppression-type list. When clicking an opt-out for an email-type campaign, they are prevented from receiving future emails from any campaign by having their email address marked on their Sugar record.
- Suppressed by Email Address or domain : The list of email addresses which were not sent the campaign email because they had previously opted out, were a member of a suppression list, or were invalid addresses.

Note : If you do not see the campaign response subpanels, the administrator may have disabled the Campaign Log subpanels for your entire Sugar instance. Reach out to your Sugar administrator to have the Campaign Log subpanels displayed. For more information on displaying and hiding subpanels throughout Sugar, please refer to the [Developer Tools](#) documentation in the Administration guide.

Campaign Results Subpanels

The last three subpanels can be used to demonstrate the broader effects of the campaign by showing what new accounts, leads, and opportunities were generated as a result of the effort.

- Accounts : The list of accounts that are related to this campaign record either through lead generation and then conversion or manually related through the Campaign field on the account's edit view.
- Leads : The list of leads that are related to this campaign record either through lead generation or manually related through the Campaign field on the lead's edit view.
- Opportunities : The list of opportunities that are related to this campaign record either through lead generation and then conversion or manually related through the Campaign field on the opportunity's edit view.

Viewing Campaign ROI

The return on investment page displays the actual revenue you earned through the campaign versus the estimated expected revenue. It also reflects the actual cost you incurred by executing the campaign versus the budget that you set for the campaign. The budget, actual cost, and expected revenue amounts entered in the campaign overview screen are displayed as bars in the campaign return on investment chart. The actual revenue is calculated from of the campaign's related opportunities that have a sales stage of "Closed Won".

Use the following steps to view a campaign's ROI:

1. Navigate to a campaign record's detail view.
2. Click the View ROI button.

WebtoLead ☆

Edit ▼   Launch Wizard   View Status   View ROI

Viewing Campaigns

There are various options available for viewing campaign records in Sugar including via Campaigns list view, Campaigns detail view, Campaigns Recently Viewed menu, dashlets, and reports. Please note that you will only be able to see campaign records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

Viewing Via List View

The Campaigns list view displays all campaign records meeting the current search criteria. To access the list view, simply click the Campaigns tab. While list view shows key campaign fields, you can click the campaign's name to open the record in detail view. For more information on viewing campaigns via list view, please refer to the Campaigns List View section.

Viewing Via Detail View

The Campaigns detail view displays thorough campaign information including all campaign fields followed by subpanels of the campaign's related records. The detail view can be reached by clicking a contact record's link from anywhere in the application including from the Campaigns list view. For more information on viewing campaigns via detail view, please refer to the Campaigns Detail View section.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which campaigns you have recently viewed. Hover on the Campaigns Module Tab to see a list of your most recently viewed campaigns and click each name to open the campaign in detail view.

Viewing Via Dashlets

The Home page displays a collection of Sugar dashlets which allow users to get a quick view of various records, activities, reports, etc. You can view campaign information in campaign-based dashlets such as "Top Campaigns" as well as access campaign detail views by clicking a campaign name in any dashlet. For more information on using dashlets and viewing campaign records via dashlets, please refer to the [Modules](#) section of the Home documentation.

Viewing Via Reports

Users with access to the Reports module have the option to build, generate, and manage various reports in Sugar. You can generate reports to gather key data regarding your campaigns plus information for related records. You also have the option to filter the report based on the campaign and related module(s) to only include records that is of importance. The display columns will only show data for fields (e.g. campaign name, type, related leads etc.) that you choose specifically when creating the report. Once the report is run, you will be able to view the campaign record's detail view by clicking the campaign's name in the report results. Please note that you can only click into campaign records for Rows and Columns Report and Summation Report with Details Report type. The other two report types (Summation Report, Matrix Report) are summation reports and do not

include display columns with hyperlinks (e.g. Campaign Name) to allow for navigating to campaign record detail views. For more information on viewing campaign records via the Reports module, please refer to the

For more information on viewing campaign records via the Reports module, please refer to the [Reports](#) documentation.

Searching Campaigns

The Campaigns list view includes a Basic and Advanced Search to help you find your records easily and effectively in a module-specific manner. Once the search is performed, the relevant search results will be displayed in the Campaigns list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %offer). This will pull up any record that has the word "offer" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.

The buttons and checkboxes available in the Basic Search panel have the following functions:

- Search : Click the Search button or hit Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Items : Select this box to return only records assigned to you.
- My Favorites : Select this box to return only records you have marked as favorites.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Items" and enter a campaign's name, Sugar will only return campaign records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the [list view](#) below the search panel. To see all campaign records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see campaign records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide.

Administrators can configure what fields appear on the Campaigns Basic Search via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Advanced Search

Advanced search offers a more in-depth search experience than Basic Search including additional fields, layout options, and saved search capability. From the Advanced search panel, you can click "Basic Search" for simplified searching.

The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Favorites : Select this box to return only records you have marked as favorites.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the [Layout Options](#) section of the Search documentation.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the [Saved Search](#) section of the Search documentation.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select "My Favorites" and enter in a campaign's name to search, Sugar will only return campaign records with a matching name that you have marked as favorites. When searching by a multiselect or dropdown field (e.g. "Assigned to"), however, Sugar will return records matching any of these selections. Once the search completes, the relevant results will populate in the list view below the search panel. To see all campaign records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see campaign records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Administrators can configure what fields appear on the Campaigns Advanced Search via Admin > Studio. For more information on editing layouts, please refer to the

Administrators can configure what fields appear on the Campaigns Advanced Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search may be used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.

To use global search, you need to first enter the keyword into the search box. With Full Text Search enabled, pop-up results will begin appearing once you input three or more characters. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. When Full Text Search is not enabled, results starting with your keyword will appear after clicking the magnifying glass icon or hitting your Return/Enter key. For more information on using and configuring Global Search, please refer to the

For more information on using and configuring Global Search, please refer to the section of the Search documentation. Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Studio documentation as well as the Search section of the System documentation in the Administration guide.

Campaigns List View

The Campaigns list view displays all campaign records meeting the current search criteria to which your user has access. You can view the basic details of each campaign within the field columns. Please note that you will only be able to see campaign records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. You have the option to change what fields are displayed in list view by configuring your layout options in the Campaigns Advanced Search. For more information on configuring your list view, please refer to the

You have the option to change what fields are displayed in list view by configuring your layout options in the Campaigns Advanced Search. For more information on configuring your list view, please refer to the Layout Options section of the Search documentation. Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing list view layouts, please refer to the Studio documentation in the Administration guide.

Pagination

List view displays the current search results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. To the right

just below the search panel you can see which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of your current results.

By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.

Checkbox Selection

You can perform several actions on campaign records directly from the list view by first selecting the desired records. To select individual campaign records on the Campaigns list view, mark the checkbox on the left of each row. To select or deselect multiple campaign records on the list view, use the options in the checkbox dropdown menu:

- Select This Page : Selects all records shown on the current page of campaign results.
- Select All : Selects all records in the current search results across all pages of campaign results.
- Deselect All : Deselects all records that are currently selected.

Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.

The options in the actions menu allow you to perform the following operations:

Delete one or more campaigns at a time Mass update one or more campaigns at a time Export one or more campaigns to a CSV file

Menu Item	Description
Delete	Delete one or more campaigns at a time
Mass Update	Mass update one or more campaigns at a time
Export	Export one or more campaigns to a CSV file

Favorite Designation

Users have the option to mark campaign records as favorites via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often as they can easily be accessed via search or from the Campaigns module tab. In the Campaigns list view, the star on the left of each campaign's row is yellow once marked to indicate a favorite campaign. For more information on marking records as favorites, please refer to the Favoriting Campaigns section of this documentation.

Campaign Status

Each campaign's status page may be accessed directly from the list view by clicking the chart icon on the right of each list view row. For more information on the campaign status page, please refer to the Campaign Status section of this documentation.

Campaign Wizard

The Campaign Wizard may be directly accessed from the list view by clicking the wand icon on the right far right of each list view row. For more information regarding the Campaign Wizard, please refer to the [Using the Campaign Wizard](#) section of this documentation.

More Information

Additional details for each campaign can be viewed by clicking the "i" to the far right of each list view row. This provides users a quick view of additional campaign information in addition to what appears in the display column fields. The resulting pop-up window will show the Start Date, Description, and Objective fields by default. The list of fields appearing here may only be configured through a code-level customization.

Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time. You can also set a default order-by column using the layout options in Advanced Search. For more information on setting a default column sort, please refer to the [Layout Options](#) section of the Search documentation.

Campaigns Detail View

The Campaigns detail view displays thorough campaign information including all campaign fields which are grouped by default into the Overview and Other panels.

You can also view a campaign's related records which appear in subpanels beneath the campaign fields. The detail view can be reached by clicking a campaign record's link from anywhere in the application including from the Campaigns list view. Please note that you will only be able to view a campaign record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the

Please note that you will only be able to view a campaign record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Users with administrator or de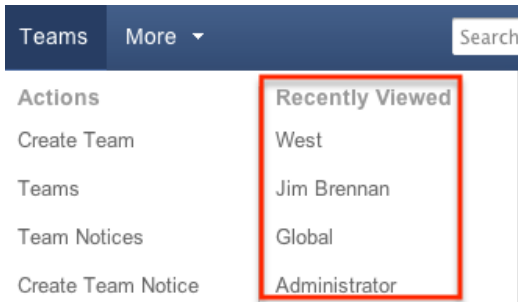veloper access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Actions Menu

The actions menu on the top left of each campaign's detail view allows you to perform various actions on the current record. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the System documentation in the Administration guide.

The options in the actions menu allow you to perform the following operations:

Menu Item	Description
Edit	Edit this campaign
Duplicate	Duplicate this campaign
Delete	Delete this campaign
Send Test	Send test emails for this campaign
Send Emails	Send all emails for this campaign
Mail Merge	Perform a mail merge

Mark As Sent	Mark a non-email campaign as being sent
View Change Log	View a record of changes to this campaign

Favorite Designation

Users have the option to mark campaign records as a favorite via the detail view as well as the list view. This allows users to group records that are important or will be viewed often as they can easily be accessed via search or from the Contacts module tab. In the Campaigns detail view, the star on the right of the contact's name is yellow once marked to indicate a favorite contact. For more information on marking records as favorites, please refer to the Favoriting Via Detail View section of this documentation.

Next or Previous Record

On the upper right of the Campaigns detail view, there are two buttons that allow you to page through each campaign in the Campaigns list view's current search results. Clicking the Previous button displays the previous campaign of the current search results while clicking the Next button displays the next campaign of the current search results. The text in between shows which campaign result you are currently viewing within the total number of current results.

Related Record Subpanels

Every campaign record's detail view will display subpanels which list related records from other modules. Users with administrator or developer access have the ability to change the fields (e.g. Name, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.

Related record subpanels allow the following operations to be performed. Please note that administrators in Sugar can change the subpanel's Action menu to be displayed as separate buttons instead of a dropdown via Admin > System Settings. For more information, please refer to the [System](#) documentation in the Administration guide.

- To view the details of a related record, click the record's name in the subpanel to open it in detail view.
- To relate an existing record to the campaign, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the campaign, choose "Create" from the subpanel's Action menu, then complete the Quick Create form and click "Save".
- To edit the campaign's related record, choose "Edit" on the far right of the record's row.
- To delete the campaign's relationship to a record, choose "Remove" from the dropdown on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

Please note that administrators can prevent users from moving subpanels to different locations in the detail view. For more information on preventing rearranging of subpanels, please refer to the [System](#) documentation in the Administration guide. Check with your system administrator if you are not able to rearrange your subpanels.

Editing Campaigns

Campaigns may be edited at any time to update or add information to the record. You can make changes to existing campaign records via the Campaigns edit view. Edit view is available within the Campaigns module and includes all of the Campaign fields you should need.

Please note that your ability to edit campaigns in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure the Campaigns edit view via Admin > Studio. For more information on configuring these layouts, please refer to the Studio documentation in the Administration guide.

Editing Via Detail View

You can edit campaigns via the detail view by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary field, then click "Save" to preserve your changes.

Editing Via List View

You can edit campaigns via the list view by clicking the pencil icon to the left of each campaign's name. A pop-up window will open with the edit view layout. Update the necessary fields, then click "Save" to preserve your changes.

Editing Via Reports

Sugar reports also allow you to edit a campaign record by clicking on the pencil icon next to a campaign's name. This opens a pop-up window with the edit view layout. Update the necessary fields, then click "Save" to preserve your changes.

Please note that you may only directly edit campaigns from Rows and Columns-type or Summation with Details-type reports as Summation and Matrix-type reports do not include the pencil icon. For more information on reports, please refer to the [Reports](#) documentation.

Deleting Campaigns

If a campaign record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Campaigns detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting campaign records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

Please note that your ability to delete campaigns may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

Deleting Via Detail View

Use the following steps to delete a campaign record via the detail view:

1. Navigate to a campaign record's detail view.
2. Select "Delete" from the Actions menu.

3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Mass Deleting Via List View

Use the following steps to delete one or more campaign records via the list view:

1. Navigate to the Campaigns list view by clicking the Campaigns module tab.
2. Use the [Basic](#) or [Advanced Search](#) to find the campaign records you wish to delete.
3. Select the desired campaign records individually or using the [checkbox dropdown's](#) options.
4. Choose "Delete" from the Actions menu.

5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Exporting Campaigns

Sugar's Export option allows users to download all fields for the selected campaigns to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use campaign data with other software such as Microsoft Excel. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of campaign records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches. Campaigns may be exported from the Campaigns list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for campaigns and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the

Campaigns may be exported from the Campaigns list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for campaigns and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the [Export](#) documentation.

Please note that your ability to export campaigns from Sugar may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

Mass Updating Campaigns

Mass Updating allows users to make the same change to multiple campaign records at once from the Campaigns list view. Users with administrator or developer access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the [Studio](#) documentation in the Administration guide. Due to the PHP memory limitations on the server, there may be occasions when the application times out while mass updating a large number of campaign records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Please note that your ability to mass update campaigns may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

Use the following steps to mass update campaign records from the list view:

1. Navigate to the Campaigns list view by clicking the Campaigns module tab.
2. Use the list view's [Basic](#) or [Advanced Search](#) to find campaigns you wish to modify.

3. Select the desired campaigns individually or using the checkbox dropdown's options.
4. Choose "Mass Update" from the Actions menu.

5. Scroll to the Mass Update panel and set values for the fields you wish to alter. Note: For the Teams field, use "Replace" to remove existing team assignments before adding those specified here. Use "Add" to add the teams specified here

to any existing team assignments.

6. Click "Update" to save the changes to all of the currently selected campaign records.

Favoriting Campaigns

Each Sugar user has the option to designate their own favorite campaigns which are important or will be viewed often. Favorite records can then be easily be accessed via search or from the Campaigns module tab. Once records are marked as favorites, use the My Favorites checkbox in the Campaigns Basic or Advanced Search to retrieve your favorites or select from your most recent favorites directly from the Campaigns module tab .

Favoriting Via List View

Use the following steps to mark records as favorites via the Campaigns list view:

1. Navigate to the Campaigns list view by clicking the Campaigns module tab.
2. Use the Basic or Advanced Search to find the campaign records you wish to

mark as favorites.

3. Click the star icon on the left of each desired campaign's row.
4. To remove the campaign as a favorite, click the star again to revert it to white.

Favoriting Via Detail View

Use the following steps to mark records as favorites via the Campaigns detail view:

1. Navigate to a campaign record's detail view.
2. Click the star icon to the right of the campaign's name in the upper left of the detail view to designate it as a favorite.
3. To remove the campaign as a favorite, click the star again to revert it to white.

Marking Campaigns As Sent

When launching a non-email campaign such as a telesales or mail campaign Sugar will need to be told that the campaign has been sent since the sending is performed outside of the application. Once you mark the campaign as sent, the Campaigns subpanel on the detail view of each member of the campaign's target populates with a row indicating and activity of "Message Sent" to indicate that the campaign material was sent to that individual. The Campaign's status page will then display these recipients in the Message Sent/Attempted subpanel. For more information on the Campaigns status page, please refer to the Viewing Campaign Status section of this documentation.

Use the following steps to mark a campaign as sent via the Campaigns detail view :

1. Navigate to a campaign record's detail view.
2. Select "Mark As Sent" from the actions menu.

Viewing Campaign Change Logs

Changes made to each campaign record are tracked over time, and users are able to view the history of changes via the change log in each campaign's detail view. To view the change log, navigate to a campaign in detail view and select "View Change Log" from the Actions menu. Please note that only fields marked as "Audit" in Admin > Studio will be displayed in the change log. For more information on designating for audit, please refer to the [Studio](#) documentation in the Administration guide.

Using the Campaign Wizard

You can use the Campaign Wizard to guide you through the process of creating a campaign, however, it is recommended to create and modify campaigns using the classic interface instead. For instructions on creating and editing campaign records using the classic interface, please refer to the [Creating Campaigns](#) and [Editing Campaigns](#) sections of this documentation.

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Mail Merge

Overview

Sugar's Mail Merge module allows users to combine data from Sugar with a message to mail to clients or customers. This simplifies the process of mailing letters or marketing information to many different addresses.

Mail merge is disabled by default in Sugar, but can be enabled through Admin > System Settings. The mail merge options will not be accessible until an administrator enables the mail merge feature. For more information on how to enable or disable mail merge, please refer to the [Mail Merge](#) section of the System documentation in the Administration Guide.

Mail merge can also be enabled or disabled for a specific user via the user profile. For more information on how to enable or disable mail merge from your user profile, please refer to the [User Settings](#) section of the Getting Started documentation in the Application guide.

There are various ways you can initiate a mail merge in Sugar such as via the Documents or Knowledge Base module tabs, certain module's list views, and from the Sugar Plug-in for Microsoft Word. Once the mail merge is created, you can download and print the mail merge file using the Sugar Plug-in for Microsoft Word. Mail merge is available in the following modules:

- Accounts
- Campaigns
- Cases
- Contacts
- Leads
- Opportunities

This documentation will cover how to use the Mail Merge module as well as the various actions and options available from within the module.

Creating Mail Merge Templates

Mail merge templates are required to perform a mail merge. The template will contain the content for the mail merge which can include variables from modules within Sugar. When you perform the mail merge, the content from the template will be repeated for each record selected and the variables will be replaced with the data from that record. Templates are created with the Sugar Plug-in for Microsoft Word and are stored in the Documents module in Sugar.

For more information on how to create a mail merge template through the Sugar Plug-in for Microsoft Word, please refer to the [Creating a Mail Merge Template](#)

section in the Sugar Plug-in for MS Word User Guide.

The template document must be stored as a Document Type of Mail Merge and specified as a Template in order to be used by the Mail Merge. For more information on creating or modifying records in the Document module, please refer to the [Documents](#) documentation in the Application guide.

Accessing Mail Merge

Mail merge can be accessed via the following ways through Sugar:

Method	Modules
[Module Tab](#)	Documents
	Knowledge Base
[List View Action](#)	Accounts
	Cases
	Contacts
	Leads
	Opportunities
[Detail Action View](#)	Campaigns

Accessing Via Module Tab

When mail merge is enabled, the Documents and Knowledge Base modules will have a Mail Merge option available in their module tabs. Click "Mail Merge" from either of these module tabs to access mail merge.

If you do not see the Documents or Knowledge Base module tabs in Sugar, please check the following:

- The top navigation bar may be filtered based on a specific tab grouping (e.g. Activities, Reports, etc.) of which the modules are not members. Click the More tab (last tab on navigation bar) then hover on "Filter Menu By" to check how the navigation bar is grouped. For more information on tab grouping, please refer to the [User Interface](#) documentation.
- The modules may be marked as hidden in your user preferences which will

prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the module in the Hide Modules list, simply move it to the Display Modules list and save. For more information on hiding and displaying modules, please refer to the [Layout Options](#) section of the Getting Started documentation.

- The administrator may have disabled the modules for your entire Sugar instance. Reach out to your Sugar administrator to have the module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the [Developer Tools](#) documentation in the Administration guide.

Accessing Via List View

When mail merge is enabled, the Accounts, Cases, Contacts, Leads, and Opportunity modules will have a Mail Merge option available in their list view action menu. From the desired module, follow these steps to perform a mail merge:

1. Use the Basic or Advanced Search to find the records you wish to send a mail merge to.

2. Select the desired records individually or using the checkbox dropdown's options. The records selected here will be the ones to receive the mail merge.

3. Choose "Mail Merge" from the Actions menu.

Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the System documentation in the Administration guide.

For more information on how to use the list view to select the records, please refer to the List View section of the desired module's documentation.

Accessing Via Campaigns

When mail merge is enabled, the Campaigns module will have a Mail Merge option available in the detail view action menu. The mail merge will allow you to select any Contacts, Leads, Targets (Prospects), or Users from the target lists on the campaign. From the desired campaign, select "Mail Merge" from the actions menu.

Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the System documentation in the Administration guide.

For more information on how to setup and configure a campaign, please refer to the Campaigns documentation in the Application guide.

Performing a Mail Merge

A mail merge can be initiated from within Sugar or from the Sugar Plug-in for Microsoft Word. Performing a mail merge from Sugar still requires the Sugar Plug-in for Microsoft Word to be used to finish the mail merge.

Performing From Sugar

Access the mail merge wizard from any of the methods listed in the [Accessing Mail Merge](#) section.
Use the following steps to run a mail merge from the Contacts module's list view in Sugar:

1. On Step 1 of the mail merge, select the template to use for the mail merge and click "Next".

   The selected module and the amount of records included in the mail merge are shown on this step.
2. Step 2 allows you to change the records selected for the mail merge.
   1. Enter criteria into the search box and click "Search" to locate records to add to the mail merge.

   2. Select any records in the Available panel and click the right arrow to move them to the Selected panel to include them in the mail merge.

3. Select any records in the Selected panel and click the left arrow to move them to the Available panel to exclude them in the mail merge.

Note : When performing a mail merge from a campaign, there is a dropdown to select which target type to perform a search under. Click "Next" to continue.

3. Step 3 allows you to review before completing the mail merge. If the information looks correct, click "Begin Merge".

4. Sugar will then prompt you to either open or save a Microsoft Word document. When that document is opened, the Sugar Plug-in for Microsoft Word will access your instance to fill in any variables in the template and will generate a page for each record selected.

Performing From MS Word

You can also perform a mail merge directly from the Sugar Plug-in for Microsoft Word. You must download the mail merge template document to your computer or create a new one in Microsoft Word. For more information on how to perform a mail merge from Microsoft Word, please refer to the Performing a Mail Merge From MS Word section in the Sugar Plug-in for MS Word User Guide.

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Web-To-Lead Forms

Overview

Sugar provides a simple way to allow visitors to your website or other online locations to become leads in your Sugar instance. You can generate a web-to-lead form in Sugar and place the form on an external website. When a visitor to your site completes and submits the form, their information is entered into Sugar as a new lead record. You can use this lead information to generate more opportunities for your organization.

Creating Web-To-Lead Forms

The Sugar Campaigns module contains a lead form wizard to assist in generating a

custom web-to-lead form. Use the following steps to create a web-to-lead form via the Campaigns module:

1. Hover on the Campaigns module and select "Create Lead Form".

2. Click and drag the desired fields from the Available Fields list to the Lead Form (First Column) or Lead Form (Second Column) lists.
   ○ Note: You can also choose to add all fields to either column by clicking the Add All Fields button.
3. All required fields marked with an asterisk must be added to a column on the lead form prior to continuing.
4. Once the fields you desire have been moved to the appropriate columns, click the Next button to continue.

Lead Form Wizard

Drag and drop lead fields in column 1 & 2

5. Enter appropriate values for the fields in the next page of the wizard:
   o Form Header : This will be the title at the top of your form. A generic title has been populated; modify or remove this to suit your needs.
   o Form Description : This will be a brief description of the form and will show below the form header, but before the form begins. A generic description has been populated; modify or remove this to suit your needs.
   o Submit Button Label : Enter in the label for the button that will be used to complete the form. Submit is the default; you may change this to say "Sign Up", "Save", "Complete", or any other label to suit your needs.
   o Post URL : This is the location the form will send the data entered and is defaulted to your instance of Sugar. Select "Edit Post URL" to edit this field.
     ▪ Note: If you change this location to be anything other than your Sugar instance then a lead will not be generated when the form is completed.
   o Redirect URL : This is the location your visitors will be directed to after completing the form. You may enter the location of your corporate website, a custom "Thanks for signing up" page, or any URL to suit your needs.
     ▪ Note: Leaving this field empty will display a message that says: "Thank You For Your Submission".
   o Related Campaign : Use the Select button to enter an existing campaign that is related to this lead form. Leads generated from this form will automatically be associated to this campaign.
   o Assigned to : Use the Select button to enter the user to be assigned to the new lead record when the form is submitted. By default, this field is

populated with the current user who is generating the form.

- ○ Team : Enter the name of the team that is allowed access to the leads generated from this form. To change the primary team, either enter the team name here or select the team. By default the primary team selected will be Global. More than one team can be assigned simultaneously. For more information on teams, please refer to the [Team Management](#) documentation.
- ○ Form Footer : The form footer displays the text entered here below the form inputs, but before the submit button.

6. All required fields are marked with a red asterisk and must be completed prior to continuing.
7. Once the necessary information is entered, click "Generate Form".
8. Sugar then generates the HTML needed for your form and shows you a preview in a TinyMCE editor. At this point you can continue to add text and images and change the layout of your form.
9. For more advanced customizations, you can click on the HTML button in the top left to access and edit the generated HTML code.
10. Once any additional changes have been completed, click "Save Web To Lead Form".

Saving Web-To-Lead Forms

Since your web-to-lead form will be hosted outside of Sugar, you will need to save the generated HTML to a different hosting location. Your generated form will not be saved or accessible through Sugar after leaving this screen. If you need to add or remove fields to your form after generation, you will have to go through the steps to generate a new form.
Use the following steps to save your generated web-to-lead form:

1. You may download the generated HTML file by clicking on the Web to Lead

Form link.

2. This will download the HTML file to your local computer. Simply transfer this file to the final hosting destination.

3. Alternatively, you may copy the HTML directly out of the text box on this screen and add it to a preexisting HTML file of your choosing.

4. Once the web-to-lead form is accessible to your potential customers, include a link to the form on your corporate website, social media websites, or add as a tracker URL in a campaign. For more information regarding adding tracker URLs to a campaign, please refer to the Campaigns documentation in the Application guide.

Lead Generation

Once a web-to-lead form is submitted the data entered in the form becomes a lead record in your instance of Sugar tied to the campaign selected during form generation. Leads can be converted to contacts, accounts, and opportunities. For more information on the Leads module, please refer to the Leads documentation in the Application guide.

The campaign selected during form generation is linked to the created lead via the Campaign field under the More Information panel:

As well as a subpanel called Campaigns:

Leads created from the web-to-lead form can be tracked in the Campaigns status page via the Status Chart:

And the subpanel titled Leads Created:

If the lead that was captured in the web-to-lead form is converted to a contact, this will be shown in the Campaigns status page as well:

For more information regarding the Campaigns status page, please refer to the [Viewing Campaign Status](#) section in the Campaigns documentation in the Application guide.

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Cases

Overview

Sugar's Cases module is used to track and manage product- or service-related inquiries submitted to your organization by customers. Cases are typically related to an account record, and multiple cases may be associated to a single account. There are various ways you can create cases in Sugar such as via the Cases

module, importing cases, or converted from email. Once the case is created, you can view and edit information pertaining to the case via the Cases detail view. Each case record may then relate to other Sugar records such as calls, contacts, bugs, and many others. This documentation will cover how to use the Cases module as well as the various actions and options available from within the module.

Case Fields

The Cases module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the [Studio](#) documentation in the Administration guide.

Field	Description
Account Name	The account that submitted the case
Assigned To	The Sugar user assigned to the case Note: Case owners receive an email whenever a case is assigned to them if the administrator has enabled email notification
Case Number	An automatically incremented number to identify every case, which cannot be edited through Sugar
Date Created	The date the case was created
Date Modified	The date the case was last modified
Description	Explanation of the cause and details of the case when submitted
Priority	Specify the urgency of the problem from this dropdown list
Resolution	Results of the investigation into the problem.
Status	Specifies the status of the case as the support representative moves the case along the process from submission to resolution
Subject	Brief statement of the problem

Teams	The Sugar team(s) assigned to the case
Type	Type of categorization that this case falls in to
Work Log	Free form field to add activities and notable events while working on the case

Cases Module Tab

The Cases module tab is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access the Cases list view. You may also hover on the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of cases you last viewed in the module. The Favorites menu displays the list of cases you most recently marked as favorites in the module.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Case	Opens the edit view layout to create a new case
View Cases	Opens the list view layout to search and display cases
View Case Reports	Displays existing reports based on the Cases module
Import Cases	Opens the import wizard to create or update cases using external data

If you do not see the Cases module tab in Sugar, please check the following:

- The top navigation bar may be filtered based on a specific tab grouping (e.g. Activities, Reports, etc.) of which the Cases module is not a member. Click the More tab (last tab on navigation bar) then hover on "Filter Menu By" to check

how the navigation bar is grouped. For more information on tab grouping, please refer to the [User Interface](#) documentation.

- The Cases module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Cases module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the [Layout Options](#) section of the Getting Started documentation.
- The administrator may have disabled the Cases module for your entire Sugar instance. Reach out to your Sugar administrator to have the Cases module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the [Developer Tools](#) documentation in the Administration guide.

Creating Cases

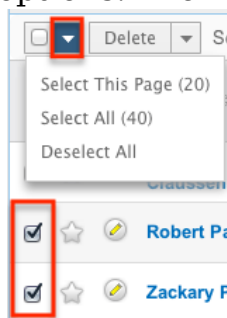There are various methods for creating cases in Sugar including via the Cases module, quick create, duplication, and importing cases. Customers can also create cases via emailing a specific email account that you have designated for that purpose. The full edit view layout opens when creating the case directly from the Cases menu and includes all of the relevant fields for your organization's cases. The quick create form is a shortened version of the Cases edit view and typically contains fewer fields. When using quick create to make a case while viewing an existing record of another module, Sugar automatically creates a relationship between both records. For example, if you are viewing an account record (e.g. ABC Company) and create a new case via the quick create form, the Account Name field in the case record will automatically populate with "ABC Company", thus creating the relationship. Both the edit view and quick create layouts can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

Creating Via Cases Module

One of the most common methods of case creation is via the Create Case option in the Cases module tab. This opens up the edit view layout which allows you to enter in all the relevant information for the case.
Use the following steps to create a case via the Cases module:

1. Hover on the Cases module tab and select "Create Case".

2. Enter appropriate values for the [fields](#) in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving. Note: Case Number is marked with a red asterisk as it is a required field, but no value is required to be added for the save to occur.
3. Once the necessary information is entered, click "Save".

Creating Via Quick Create

The quick create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also quick create a case from any Cases subpanel on related module records.
Use the following steps to create a case via Quick Create:

1. Open the quick create menu on the upper right of any Sugar page and select "Create Case" or select "Create" on any Cases subpanel on a related module's detail view.
Note: The quick create menu can be reconfigured by administrators via Admin > Configure Navigation Bar Quick Create. For more information on configuring layouts, please refer to the [Configure Navigation Bar Quick Create](#) documentation in the Administration guide.
From quick create menu:

From subpanel:

2. Enter appropriate values in the fields in the quick create form. All required fields are marked with a red asterisk and must be completed prior to saving.
3. If additional fields are desired, click the Full Form button to use edit view instead.
4. Once the necessary information is entered, click "Save".

Creating Via Duplication

You can also create a new case by duplicating an existing case. The duplicate option is useful if the case you are creating has similar information to an existing case, such as reopening a previously closed case.

Use the following steps to create a case by duplicating an existing record:

1. Navigate to a case record's detail view.
2. Click the Actions menu and select "Duplicate".

System not responding ☆

Edit ▾
Duplicate
Delete
Find Duplicates
Create Article
View Change Log ⟩w

3. The displayed edit view is pre-populated with the original case's values.
   Update the necessary fields, then click "Save".
   Note: Case Number is not duplicated and a unique number is generated upon
   saving the duplicate case.

Create

Save   Cancel   View Change Log

⌃ Overview
Number: *
Priority: High ⬍
Status: New ⬍
Type: Administration ⬍
Subject: *   System not responding

Importing Cases

The import function allows you to push multiple case records into Sugar using a
comma (or other character) delimited file instead of creating them one-by-one. For
more information on importing, please refer to the Import documentation.

Use the following steps to import cases via the Import Cases option:

1. Hover on the Cases module tab and select "Import Cases".

2. In Step 1, select the source of the data you are importing. Click "Next".
3. In Step 2, select the import file and choose "Create new records only". Click "Next".
4. In Step 3, confirm the import file properties. Click "Next".
5. In Step 4, confirm the field mappings for the import. Click "Next".
6. In Step 6, view the import results.
   - The Created Records tab will show all of the new case records.
   - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
   - The Errors tab will show records that were not imported due to errors detected during import.

Creating Cases From Email

Creating cases via email allows users added convenience in the case creation process, therefore expediting the amount of time before the support team can begin working on the issue. Cases can be created from emails sent to individual users through the emails module or can be automatically created when emails are sent to a group mailbox which is monitored by Sugar.

Creating Via Emails Module

Users in Sugar can launch a quick create form to create a case from an external email or from an imported email. From the emails pane in the Emails module, click "Quick Create" and select "Case".

The quick create form opens in a popup window. The subject and description fields for the case are populated by default with the subject and body of the email. All required fields are marked with a red asterisk and must be completed prior to

saving. Once the necessary information is entered, click "Save".

The email selected will then be imported, if not already, and will be related to the new case. A relationship will be made between the email and the case created via the flex relate field.

Creating Via Inbound Email

The Inbound Email functionality allows a way for customers to submit a case directly into Sugar via email instead of a Sugar user having to imput the information and submit the case manually. Sugar has the ability to monitor specific email boxes to be able to automatically create these cases. For more information on Inbound Email, please refer to the Inbound Email documentation.

Viewing Cases

There are various options available for viewing case records in Sugar including via Cases list view, Cases detail view, Cases Last Viewed menu, dashlets, and reports. Please note that you will only be able to see case records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide.

Viewing Via List View

The Cases list view displays all case records meeting the current search criteria. To access the list view, simply click the Cases module tab. While list view shows key case fields, you can click the case's subject to open the record in detail view. For more information on viewing cases via list view, please refer to the Cases List View section of this documentation.

Viewing Via Detail View

The Cases detail view displays thorough case information including all case fields followed by subpanels of the case's related records belonging to various modules. The detail view can be reached by clicking a case record's link from anywhere in the application including from the Cases list view. For more information on viewing cases via detail view, please refer to the Cases Detail View section of this documentation.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which cases you have recently viewed. Hover on the [Cases module tab](#) to see a list of your most recently viewed cases and click each name to open the case in detail view.

Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets which allow users to get a quick view of various records, activities, reports, etc. You can view case information in case-based dashlets such as "My Open Cases" as well as in dashlets based on other modules such as "My Calls". Clicking a case's subject from any dashlet will open the case in detail view. For more information on using dashlets and viewing case records via dashlets, please refer to the [Modules](#) section of the Home documentation.

Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding cases and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the case record's detail view by clicking the case's subject in the report results. Please note that you can only directly access case detail views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display

columns. For more information on using reports, please refer to the [Reports](#) documentation.

In addition to navigating to the Reports module and finding or building relevant reports, you can use the Case module tab's View Case Reports option to see all case-based reports to which you have access.

Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

Searching Cases

The Cases list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Cases list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the

keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %system). This will pull up any record that has the word "system" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the [Search](#) documentation.

Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.

The buttons and checkboxes available in Basic Search panel have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Items : Select this box to return only records assigned to you.
- My Favorites : Select this box to return only records you have marked as favorites.
- Open Items : Select this box to return records where the status is not Closed, Rejected, or Duplicate.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Items" and enter a case subject, Sugar will only return case records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the [list view](#) below the search panel. To see all case records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see case records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Teams](#) and [Roles](#) documentation in the Administration guide.

Administrators can configure what fields appear on the Cases Basic Search via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Advanced Search

Advanced Search offers a more in-depth search experience than Basic Search including additional fields, layout options, and saved search capability. From the Advanced search panel, you can click "Basic Search" for simplified searching.

The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Favorites : Select this box to return only records you have marked as favorites.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the Layout Options section of the Search documentation.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section of the Search documentation.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select "My Favorites" and enter in a case subject to search, Sugar will only return case records with a matching name that you have marked as favorites. When searching by a multiselect or dropdown field (e.g. "Assigned to"), however, Sugar will return records matching any of these selections. Once the search completes, the relevant results will populate in the list view below the search panel. To see all case records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see case records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide.

Administrators can configure what fields appear on the Cases Advanced Search via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search may be used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.

To use global search, you need to first enter the keyword into the search box. With Full Text Search enabled, pop-up results will begin appearing once you input three or more characters. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. When Full Text Search is not enabled, results starting with your keyword will appear after clicking the magnifying glass icon or hitting your Return/Enter key. For more information on using and configuring Global Search, please refer to the [Global Search](#) section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results. For more information on configuring your Global Search, please refer to the [Search](#) documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the [Field Options](#) section of the Studio documentation as well as the [Search](#) section of the System documentation in the Administration guide.

Cases List View

The Cases list view displays all case records meeting the current search criteria and to which your user has access. You can view the basic details of each case within the field columns. Please note that you will only be able to see case records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Teams](#) and [Roles](#) documentation in the Administration guide.

You have the option to change what fields are displayed in list view by configuring your layout options in the Cases Advanced Search. For more information on configuring your list view, please refer to the [Layout Options](#) section of the Search documentation. Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Pagination

List view displays the current search results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. To the right just below the search panel you can see which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of your current results.

By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.

Checkbox Selection

You can perform several actions on case records directly from the list view by first selecting the desired records. To select individual case records on the Cases list view, mark the checkbox on the left of each row. To select or deselect multiple case records on the list view, use the options in the checkbox dropdown menu:

- Select This Page : Selects all records shown on the current page of case results.
- Select All : Selects all records in the current search results across all pages of case results.
- Deselect All : Deselects all records that are currently selected.

Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.

The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Delete	Delete one or more cases at a time
Mass Update	Mass update one or more cases at a time
Mail merge	Perform a mail merge on one or more accounts at a time. Note: This option only appears when Mail Merge is enabled at the system level and under the user's profile.
Merge	Merge two or more duplicate cases
Export	Export one or more cases to a CSV file

Favorite Designation

Users have the option to mark case records as favorites via the list view as well as

the detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Cases module tab. In the Cases list view, the star on the left of each case's row is yellow once marked to indicate a favorite case. For more information on how to mark records as favorites, please refer to the [Favoriting Cases](#) section of this documentation.

More Information

Additional details for each case can be viewed by clicking the "i" icon to the far right of each list view row. This provides users a quick view of additional case information in addition to what appears in the display column fields. The resulting pop-up window will show the Description and Resolution fields by default. The list of fields appearing here may only be configured through a code-level customization.

Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time. You can also set a default order-by column using the layout options in Advanced Search. For more information on setting a default column sort, please refer to the [Layout Options](#) section of the Search documentation.

Cases Detail View

The Cases detail view displays thorough case information including all case fields which are grouped by default into the Overview and Other panels. You can also view a case's related records (Activities, Contacts, Bugs, etc.) which appear in [subpanels](#) beneath the case fields. The detail view can be reached by clicking a case record's link from anywhere in the application including from the Cases list view.

Please note that you will only be able to view a case record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the [Teams](#) and [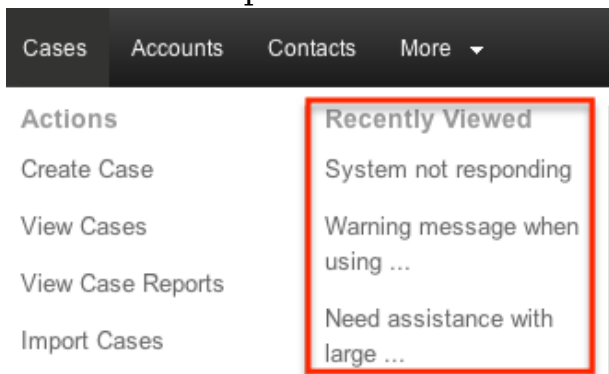Roles](#) documentation in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Actions Menu

The Actions menu on the top left of each case's detail view allows you to perform various actions on the current record. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the [System](#) documentation in the Administration guide.

The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
[Edit](#)	Edit this case
[Duplicate](#)	Duplicate this case
[Delete](#)	Delete this case
[Find Duplicates](#)	Locate potential duplicates of this case
Create Article	Converts information from case to the edit view of a Knowledge Base article.

	Please refer to the [Knowledge Base](#) documentation in the Application Guide
[View Change Log](#)	View a record of changes to this case

Favorite Designation

Users have the option to mark case records as a favorite via the detail view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Cases module tab. In the Cases detail view, the star on the right of the case's subject is yellow once marked to indicate a favorite case. For more information on how to mark records as favorites, please refer to the [Favoriting Cases](#) section of this documentation.

Next or Previous Record

On the upper right of the Cases detail view, there are two buttons that allow you to page through each case in the Cases list view's current search results. Clicking the Previous button displays the previous case of the current search results while clicking the Next button displays the next case of the current search results. The text in between shows which case result you are currently viewing within the total number of current results.

Subpanels

Beneath a case record's fields are subpanels containing related records from

various modules, communication history regarding the case, and what contacts to work with regarding the case.

Related Record Subpanels

The most common type of subpanels displayed on a case's detail view contain the case's related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. For example, a case may be related to only one account but related to multiple contacts. This means that the related account will be displayed amongst the case's fields while contacts will be displayed in a subpanel beneath the fields.

Users with administrator or developer access have the ability to change the fields (e.g. Subject, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the [Studio](#) documentation in the Administration guide.

Related record subpanels allow the following operations to be performed. Please note that administrators in Sugar can change the subpanel's Action menu to be displayed as separate buttons instead of a dropdown via Admin > System Settings. For more information, please refer to the [System](#) documentation in the Administration guide.

- To view the details of a related record, click the record's name in the subpanel to open it in detail view.
- To relate an existing record to the case, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the case, choose "Create" from the subpanel's Action menu, then complete the Quick Create form and click "Save".
- To delete the case's relationship to a record, choose "Unlink" from the dropdown on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

Please note that administrators can prevent users from moving subpanels to different locations in the detail view. For more information on preventing rearranging of subpanels, please refer to the [System](#) documentation in the Administration guide. Check with your system administrator if you are not able to rearrange your subpanels.

Activities and History Subpanels

The Activities subpanel lists open or upcoming tasks, calls, and meetings that are related to the case record. Once the activities have taken place or are completed, they will instead appear within the History subpanel. The History subpanel also includes notes and emails associated with the case record. For more information on the history and activities subpanel, please refer to the [User Interface](#) documentation.

Editing Cases

Cases may be edited at any time to update or add information to the record. You can make changes to existing case records via the Cases edit view and quick create forms. Edit view is available within the Cases module and includes all of the Case fields you should need.

Quick create is available for editing cases from outside the Cases module and opens as a pop-up without navigating away from your current page. It generally contains fewer fields, but the Full Form button may be used to access the full edit view should you need to edit additional fields.

Please note that your ability to edit cases in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure both the Cases edit view and quick create via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

Editing Via Detail View

You can edit cases via the [detail view](#) by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve the changes made.

System not responding ⭐

Edit ▼

⋀ Overview

| Case Number: | 58 |
| Status: | Pending Input |

Editing Via List View

You can edit cases via the [list view](#) by clicking the Pencil icon to the left of each case's subject. A pop-up window will open with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes.

| | Num. ⇕ | Subject ⇕ | Account Name ⇕ | Priority ⇕ |
| 🖉 | 33 | System not responding | SugarCRM | High |

Editing Via Dashlets

You can edit cases by clicking the pencil icon to the far right of any cases-based dashlet on your Sugar home page. For example, clicking the pencil icon within the My Open Cases dashlet will open a pop-up window with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. For more information on dashlets, please refer to the [Home](#) documentation.

| My Sugar | Sales | Marketing | Support | + |

My Open Cases

|< < (1 - 3 of 3) > >|

| Number ⇕ | Subject ⇕ | Priority ⇕ | Status ⇕ | |
| 58 | **System not responding** | High | Pending Input | 🖉 |

Editing Via Reports

Sugar reports also allow you to edit a case record by clicking on the pencil icon next to a case's subject. This opens a pop-up window with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. Please note that you may only directly edit cases from Rows and Columns-type or Summation with Details-type reports as Summation-type and Matrix-type reports do not include the pencil icon. For more information on reports, please refer to the [Reports](#) documentation.

Deleting Cases

If a case record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Cases detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting case records will not delete the related records and will only remove the relationship.

Please note that your ability to delete cases in Sugar may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

Deleting Via Detail View

Use the following steps to delete a case record via the detail view:

1. Navigate to a case record's detail view.
2. Select "Delete" from the Actions menu.

3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Mass Deleting Via List View

Use the following steps to delete one or more cases via the list view:

1. Navigate to the Cases list view by clicking the Cases module tab.
2. Use the [Basic](#) or [Advanced Search](#) to find the cases you wish to delete.
3. Select the desired case records individually or using the [checkbox dropdown's](#)options.
4. Choose "Delete" from the Actions menu.

5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Due to PHP memory limitations on the server, there may be occasions when the application times out while deleting a large number of case records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Exporting Cases

Sugar's Export option allows users to download all fields for the selected cases to their computers as a CSV (comma-separated values) file. This may be useful when needing to use Case data with other software such as Microsoft Excel or to update

existing records by exporting, making changes, then importing the altered cases back into Sugar. For more information on updating existing records via import, please refer to the Import documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of case records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Cases may be exported from the Cases list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for cases and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.

Please note that your ability to export cases from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

Mass Updating Cases

Mass Updating allows users to make the same change to multiple case records at once from the Cases list view. Users with administrator or developer level access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide. Due to the PHP memory limitations on the server, there may be occasions when the application times out while mass updating a large number of case records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Please note that your ability to mass update cases may be restricted by a role. For more information on roles, please refer to the Role Management documentation in

the Administration guide. Check with your system administrator if you do not see the Mass Update option.

Use the following steps to mass update case records from the list view:

1. Navigate to the Cases list view by clicking the Cases module tab.
2. Use the list view's Basic or Advanced Search to identify cases you wish to modify.
3. Select the desired cases individually or using the checkbox dropdown's options.
4. Choose "Mass Update" from the Actions menu.

5. Scroll to the Mass Update panel and set values for the fields you wish to alter. Note: For the Teams field, use "Replace" to remove existing team assignments before adding those specified here. Use "Add" to add the teams specified here to any existing team assignments.

6. Click "Update" to save the changes to all of the currently selected case records.

Finding Duplicate Cases

Between multiple users working in Sugar, importing new records, and creating cases via email, it is possible for duplicate case records to be accidentally input to the system. Before creating a new case record, a good practice is to first check that the same issue for the same account does not already exist in Sugar. You can locate duplicate records for cleanup using Basic and Advanced Search from the Cases list view. Searching for cases with similar names, related accounts, or other information can turn search a powerful, duplicates-finding tool. Sugar also provides a wizard for finding potential duplicates that is available from the Cases detail view and may be used as shown below. If duplicate case records are detected, you can perform a merge per the Merging Cases section of this documentation.

Please note that your ability to use the Find Duplicate action may be restricted by any role which prevents case deletion. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Find Duplicates option.

Use the following steps to locate duplicate cases using the Find Duplicates option from the Cases detail view:

1. Navigate to a case record's detail view.
2. Choose "Find Duplicates" from the Actions menu.

3. Move any fields you wish to use in identifying duplicates to the list on the right by selecting the field and clicking the arrow.

4. Click "Next Step" to display a list of potential duplicate case records which match all of the specified filters.

Once you determine which cases of the resulting list are indeed duplicates of your original record, select the duplicates by marking the checkboxes, then click "Perform Merge" to begin a merge with the current record. Instructions for the merge process that follows can be found in the Merging Via Detail View section of this documentation.

Merging Cases

When duplicate records are identified in Sugar, you have the option to merge two or more cases into a single record. Once the merge is complete, the duplicate case record(s) will be deleted, and the primary record will remain. Please note that all relationships belonging to the duplicate cases will be merged to the primary record meaning that any calls, meetings, contacts, etc. related to the duplicate case record(s) will automatically be related to the resulting, merged case record.

Merging Via Detail View

Use the following steps to merge cases via the Cases detail view:

1. Navigate to a case record's detail view.
2. Use the Find Duplicates option as shown in Finding Duplicate Cases to identify duplicate cases.

3. Possible duplicates will be displayed in the results list. Select the duplicate record(s).

4. Click "Perform Merge" to display the Merge Cases page. The primary record's field values are displayed on the left while other records' values are in columns to the right. Saving the merge will preserve only the leftmost values for each field into a single case record.

5. To change which record is considered the primary, click the "Set as primary" double arrows.
6. Review the field values in each column and use the associated double arrows to move the best value for each field to the leftmost column.
7. Click "Save Merge" once the left column contains all fields you wish to appear on the single, merged record.
8. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Ok" to proceed.

Merging Via List View

[Basic](#) and [Advanced Search](#) may be used to identify duplicate cases by, for example, searching for cases with similar names or related accounts. Once your search has identified duplicate cases, you can merge them directly from the Cases list view.

Use the following steps to merge cases via the list view:

1. Use the list view's [Basic](#) or [Advanced Search](#) to identify duplicate cases.
2. Possible duplicates will be displayed in the list view. Select the duplicate record(s) that you wish to merge.

3. Select "Merge" from the Actions menu to display the Merge Cases page. The primary record's field values are displayed on the left while other record's values are in columns to the right. Saving the merge will preserve only the leftmost values for each field into a single case record.

4. To change which record is considered the primary, click the "Set as primary" double arrows.
5. Review the field values in each column and use the associated double arrows to move the best value for each field to the leftmost column.
6. Click "Save Merge" once the left column contains all fields you wish to appear on the single, merged record.
7. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Ok" to proceed.

Favoriting Cases

Each Sugar user has the option to designate their own favorite cases which are important or will be viewed often so that they can easily be accessed via search or

from the Cases module tab. Once records are marked as favorites, use the My Favorites checkbox in the Cases [Basic](#) or [Advanced Search](#) to retrieve your favorites or select from your most recent favorites directly from the [Cases module tab](#) .

Favoriting Via List View

Use the following steps to mark records as favorites via the Cases list view:

1. Navigate to the Cases list view by clicking the Cases module tab.
2. Use the [Basic](#) or [Advanced Search](#) to find the Cases records you wish to mark as favorites.
3. Mark the star icon on the left of each desired case's row.
4. To remove the case as a favorite, click the star again to revert it to white.

Favoriting Via Detail View

Use the following steps to mark records as favorites via the Cases detail view:

1. Navigate to a case record's detail view.
2. Click the star icon to the right of the case's name in the upper left of the detail view to designate it as a favorite.
3. To remove the case as a favorite, click the star again to revert it to white.

Viewing Cases Change Logs

Changes made to each case record are tracked over time, and users are able to view the history of changes via the change log in each case's detail view. To view the change log, navigate to a case in detail view and select "View Change Log" from the Actions menu. Please note that only fields marked as "Audit" in Admin > Studio will be displayed in the change log. For more information on designating for audit, please refer to the [Studio](#) documentation in the Administration guide.

Communicating Regarding Cases

Sugar includes the functionality to allow users to communicate with customers and keep an archive of communication between a support representative and the customer with regards to cases. Communication between cases is best performed via emails.

When using email communication, please note that administrators in Sugar must first configure the outbound mail server for the system via Admin > Email Settings in order for users to send outbound emails. For more information on setting up the system email settings, please refer to the [Email](#) documentation in the Administration guide. Users will also need to have their email settings configured in their user preferences prior to sending outbound email from the Emails module or Cases module. For more information on setting up your user preferences' email settings, please refer to the [Getting Started](#) documentation.

Communicating Via Emails

Sugar allows emails to be archived to cases and visible in the [History Subpanel](#) regardless of them being sent and received in Sugar directly. When an email is received by Sugar, using either Inbound Email or Email Archiving, Sugar will utilize a Case Macro to relate the email. The Case Macro is placed in the subject line of the email and contains the case number that the email should be related to. Case Macros are configurable by an administrator via Admin > Inbound Email, but

will typically use the standard format of [CASE:##] to be placed in the subject line. For more information on configuring the case macro, please refer to the [Inbound Email](#) documentation. The formatting of the macro is imperative for Sugar to properly read the subject of the email for import. For example, a proper subject line with the macro will be: "[CASE:125] System not responding".

One way that the emails can be received in Sugar to use the case macro is through a monitored inbound mailbox. This is a mailbox on your company's mail server that Sugar is granted the ability to read. For example, this would function where an email is sent from to support@mycompany.com and includes a proper case macro. Sugar would then poll the mailbox, find the case macro, and associate the email to the specified case in the macro. This can also be used by support representatives who are directly emailing with a customer. The group mailbox can be CC'd and, using the case macro, have the email thread archived. For more information on configuring an inbound email box, please refer to the [Inbound Email](#) documentation.

The other option that users have to archive emails is using Sugar's Email Archiving functionality. Email Archiving must be configured and enabled by administrators in Sugar via Admin > Email Settings. Once configured, an email address will be generated that is specific to your instance of Sugar. When this email address receives an email, it scans the email for any email addresses. The email is then imported into Sugar, where the email is associated to any contact, lead, etc. containing an email address on the email. When including the case macro on the email, Sugar will also import this email to the referenced case. For more information on setting up Email Archiving, please refer to the [Email Archiving](#) documentation in the Administration guide.

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Knowledge Base

Overview

Sugar's Knowledge Base module provides the ability to create, maintain, and publish articles. Knowledge Base articles can cover a variety of topics like case resolutions or frequently asked questions for internal reference. Once an article is created, you can view and edit information pertaining to the article via the detail view. This documentation will cover how to use the Knowledge Base module as well as the various actions and options available from within the module.

Knowledge Base Fields

The Knowledge Base module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.

Field	Description
Approver	The Sugar user to approve the article Note: When selecting "In Review" status; defaults to the admin user.
Attachments	Any external files to be attached to the article
Author	The Sugar user who owns the article Note: Defaults to the current user
Body	The HTML content of the article
Expiration Date	The date the article information is expired
Revision	The article's current revision number
Status	The current status of the article (e.g. Draft, Expired, In Review, Published)
Tags	Which topics or categories are assigned to the article
Teams	The Sugar team(s) assigned to the article
Title	The title or designation of the article

Knowledge Base Module Tab

The Knowledge Base module tab is typically located under the More tab on the navigation bar at the top of any Sugar screen to the right of the home cube icon. Depending on your settings, you may have to click "Show More" in order to see the Knowledge Base module tab. Click the tab to access the Knowledge Base list view. You may also hover on the tab to display the Actions, and Recently Viewed menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of articles you last viewed in the module.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Article	Opens the edit view layout to create a new article
View Articles	Opens the list view layout to search and display articles
Administer Knowledge Base	Opens up the admin page to configure the Knowledge Base

If you do not see the Knowledge Base module tab in Sugar, please check the following:

- The top navigation bar may be filtered based on a specific tab grouping (e.g. Activities, Reports, etc.) of which the Knowledge Base module is not a member. Click the More tab (last tab on navigation bar) then hover on "Filter Menu By" to check how the navigation bar is grouped. For more information on tab grouping, please refer to the User Interface documentation.
- The Knowledge Base module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Knowledge Base module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Knowledge Base module for your entire Sugar instance. Reach out to your Sugar administrator to have the Knowledge Base module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

Creating Articles

There are a few methods for creating articles in Sugar including via the Knowledge

Base module, duplication, and from a case record. The edit view layout opens when creating the article directly from the Knowledge Base menu and includes all of the relevant fields for your organization's articles.

- Draft : The article is undergoing changes.
- Expired : The article is outdated.
- In Review : The article is being reviewed by the designated approver. When this status is selected, Sugar sends a notification email to the Approver.
- Published : The article is complete.

Creating Via Knowledge Base Module

One of the most common methods of article creation is via the Create Article option in the Knowledge Base module tab. This opens up the edit view layout which allows you to enter all the relevant information for the article.
Use the following steps to create an article via the Knowledge Base module:

1. Hover on the Knowledge Base module and select "Create Article".

2. Enter appropriate values for the fields in the edit view layout. Fields marked with a red asterisk as well as the article body are required and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".

Creating Via Duplication

You can also create a new article by duplicating an existing article. The duplicate option is useful if the article you are creating has similar information to an existing article.

Note: Article tags do not copy over to the new article.

Use the following steps to create an article by duplicating an existing record:

1. Navigate to an article's detail view.
2. Click the Actions menu and select "Duplicate".

3. The displayed edit view is pre-populated with the original article's values. Update the necessary fields, then click "Save".
   Note: Duplicating a published article will default the new article to a status of "Draft".

Creating Via Cases

Sugar enables you to transfer details from a case record to create a knowledge base article. This is designed for situations where a case has documented a resolution to a problem. Creating an article from such records enables the user to share the information with other users without manually copying or duplicating the information. A new article is created using the subject of the case as the title of the article. The body of the new article is automatically populated with the case number, subject, description, and resolution from the case. For more information

on creating and modifying cases, please refer to the [Cases](#) documentation.

Use the following steps to create an article from a case:

1. Navigate to a case record's detail view.
2. Select "Create Article" from the Actions menu.

3. Update the necessary fields, then click "Save".

Viewing Articles

There are various options available for viewing articles in Sugar including via Knowledge Base list view, Knowledge Base detail view, Knowledge Base Last Viewed menu, and reports. Please note that you will only be able to see articles as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide.

Viewing Via List View

The Knowledge Base list view displays all articles meeting the current search criteria. To access the list view, simply click the Knowledge Base module tab. Before performing a search, the list view populates with the top ten most viewed articles. While the list view shows key article fields, you can click the article's title to open the article in the detail view. For more information on viewing articles via list view, please refer to the [Knowledge Base List View](#) section of this

documentation.

Viewing Via Browsing

The Knowledge Base browse view displays all of the tags in a tree structure and all of the articles under each tag. To access the browse view, simply click the Browse tab on the Knowledge Base list view.

Select a tag on the left hand side of the page to view any articles assigned to that tag. If there are more tags nested under a tag, you can click the plus sign (+) to view the nested tags. All tags are visible to all users, but you will only be able to see articles as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

While the list view shows key article fields, you can click the article's title to open the article in the detail view. For more information on viewing articles via list view, please refer to the Knowledge Base List View section of this documentation.

Viewing Via Detail View

The Knowledge Base detail view displays thorough article information including all article fields. The detail view can be reached by clicking an article's title link from anywhere in the application including from the Knowledge Base list view. For more information on viewing articles via detail view, please refer to the Knowledge Base Detail View section of this documentation.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which articles you have recently viewed. Hover on the Knowledge Base module tab to see a list of your most recently viewed articles and click each title to open the article in the detail view.

Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding articles and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. For more information on using reports, please refer to the [Reports](#) documentation.
Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

Searching Articles

The Knowledge Base list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Knowledge Base list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module.

Basic Search

The Basic Search in the Knowledge Base module utilizes the Full Text Search built into the database. This is enabled and configured by default for On-Demand instances and On-Site instances running MySQL. For more information on how to enable Full Text search on MSSQL for On-Site instances, please refer to the [Enabling Search on MSSQL](#) section in the Knowledge Base Administration

documentation in the Administration guide.

Basic Search offers a keyword search as well as a category option.

Search

The keyword search uses syntax understood by the database sugar is running on and searches the full text index of the body of the article. Click the "i" icon to get some guidance on the syntax used for keyword searches.

The syntax listed below is specifically for MySQL although many, if not all, of these features will work on MSSQL as well:

- Case Insensitive : Searching for "device" will locate articles that contain "Device" as well.
- Phrase Search : Phrases can be searched, but must be enclosed by double quotes (e.g. "the settings screen").
- Multiple Keywords : Search for multiple keywords by separating them with a space character. Sugar assumes an "or" operator between the words. For example, search for "battery device" will find any article that contains the word "battery" or the word "device".
- Require Words or Phrases : To require a word or phrase in your results the word or phrase should be preceded by a plus sign (+). For example, search for "+battery +device" will find any article that has the word "battery" and the word "device".
- Exclude Words or Phrases : To exclude a word or phrase in your results the word or phrase should be preceded by a minus sign (-). For example, search for "+device -internet" will find any article that has the word "device" but does not have the word "internet".
- Wildcards : Use an asterisk (*) to have your keyword return a partial match. For example, search for "batt*" will return any article that contains a word that start with batt (e.g. battery).

Note: Words that contain less than four letters are treated as stop words in MySQL, unless they are part of a phrase. Hence, the search results will not display articles containing such words. There is also a list of default stop words that MySQL will exclude from Full Text Searching. For the complete list of default stop words in MySQL 5.5, please refer to the Stop Words documentation on the MySQL website.

In addition to the keyword search you can also select a category to perform the

search in.

The categories included by default are the following :

- All : Searches all articles.
- Added Last 30 days : Searches any articles created within the last 30 days.
- Pending my Approval : Searches any articles that have a status of "In Review" and the Approver are set to the current user.
- Updated Last 30 days : Searches any articles modified within the last 30 days.
- FAQs : Searches any articles currently set to the FAQ tag.

You can use the category search in coordination with the keyword search in order to find any articles containing the keyword that also matches one of the categories. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all articles to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see articles as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide.

Advanced Search

Advanced Search offers a more in-depth search experience than Basic Search including additional fields and saved search capability. From the Advanced search panel, you can click "Search" for simplified searching.

The buttons, checkboxes, and dropdowns available in Advanced Search have the

following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the [Saved Search](#) section of the Search documentation.
- Containing these words : Enter one or more keywords or phrases. Use a space to separate keywords from each other. Use quotes to enclose a phrase.
- Note: The plus sign (+) mentioned in Basic Search is not required in this section.
- Search within : Select the category to filter the results by (e.g. All, Added last 30 days, etc.).
- Excluding these words : Enter one or more keywords or phrases to exclude from the search. Use a space to separate keywords or phrases from each other.
- Note: The minus sign (-) mentioned in Basic Search is not required in this section.
- Using This Tag : Enter the tag name or click "Select" to choose the tag from the Tags list.
- Title : Enter a title name. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase.
- Viewing Frequency : Select the frequency category to filter the results by (e.g. Top 5, Top 10, Bottom 5, etc.).
- Status : Select the status to filter the results by (e.g. Draft, Expired, In Review, or Published).
- Team : Enter the team name or click "Select" to choose the team from the Teams list.
- Approved By : Enter the person's name or click "Select" to choose a user from

the Users list to see articles approved by a specific user.

- Author : Enter the person's name or click "Select" to choose a user from the Users list to see articles authored or assigned to a specific user.
- Published : Select an option from the dropdown to filter articles by published date (e.g. On a specific date, Is Between two specific dates, Last 7 days, etc.).
- Expires : Select an option from the dropdown to filter articles by expires date (e.g. On a specific date, Is Between two specific dates, Last 7 days, etc.).
- Attachments : Select an option from the dropdown to filter articles with or without attachments. You can also search using criteria like Mime Type and Attachment name.

When you perform a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you specify a tag filter via "Using This Tag" and enter an article title into the search box, Sugar will only return articles with a matching title that are marked as external. Once the search completes, the relevant results will populate in the list view below the search panel. To see all articles to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see articles as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide.

Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search may be used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right-hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.

To use global search, you need to first enter the keyword into the search box. With Full Text Search enabled, pop-up results will begin appearing once you input three or more characters. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. When Full Text Search is not enabled, results starting with your keyword will appear after clicking the magnifying glass icon or hitting your Return/Enter key. For more information on using and configuring Global Search, please refer to the [Global Search](#) section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Studio documentation as well as the Search section of the System documentation in the Administration guide.

Note: Global Search is turned off for the Knowledge Base module by default. For more information on how to enable and disable modules for the global search, please refer to the System documentation in the Application guide.

Knowledge Base List View

The Knowledge Base list view displays all articles meeting the current search criteria and to which your user has access. You can view the basic details of each article within the field columns. Please note that you will only be able to see articles as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

Pagination

List view displays the current search results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. To the right just below the search panel you can see which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of your current results.

By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.

More Information

Additional details for each article can be viewed by hovering over the title of the article. This provides users a quick view of additional information in addition to what appears in the display column fields. The resulting pop-up window will show the Publish Date, Expiration Date, and Body fields by default. The list of fields appearing here may only be configured through a code-level customization.

Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time.

Knowledge Base Detail View

The Knowledge Base detail view displays thorough article information including all knowledge base fields. The detail view can be reached by clicking an article's link from anywhere in the application including from the Knowledge Base list view. Please note that you will only be able to view an article according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide.
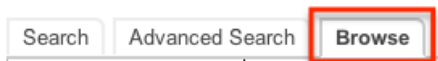
Actions Menu

The Actions menu on the top left of each article's detail view allows you to perform various actions on the current record. Administrator users can change the action i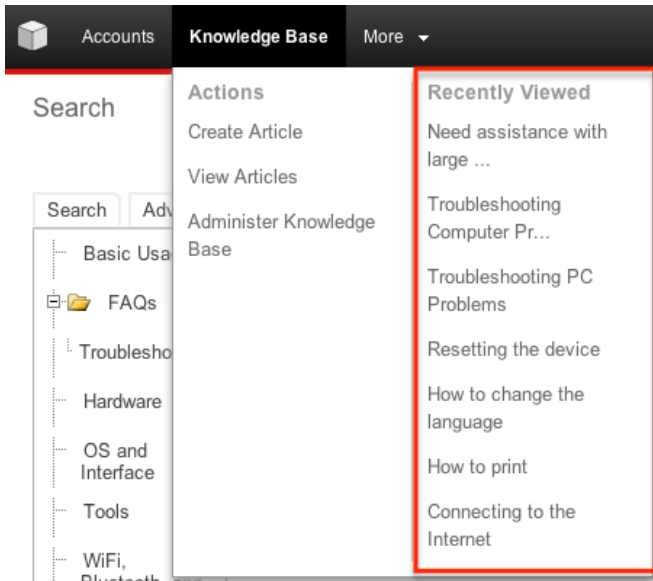tems to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the System documentation in the Administration guide.

The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Edit	Edit this article
Duplicate	Duplicate this article
Delete	Delete this article
Send Email	Send an email with the contents of this article

Show More Details

The Knowledge Base detail view hides some of the fields on the article by default. Click "Show More Details" to reveal the following fields: Status, Team, Approver, Publish Date, Revision, and Expiration Date.

Editing Articles

Articles may be edited at any time to update or add information to the record. You

can make changes to existing articles via the Knowledge Base edit view. Edit view is available within the Knowledge Base module and includes all of the article fields you should need.

Please note that your ability to edit articles in Sugar may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Editing Via Detail View

You can edit articles via the detail view by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve the changes.

Editing Via List View

You can edit articles via the list view by clicking the Pencil icon to the right of each row. The article will open directly to the edit view. Update the necessary fields, then click "Save" to preserve the changes.

Deleting Articles

If an article is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from the Knowledge Base detail view.
Please note that your ability to delete articles in Sugar may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

Deleting Via Detail View

Use the following steps to delete an article via the detail view:

1. Navigate to an article's detail view.
2. Select "Delete" from the Actions menu.

3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Exporting Articles

Sugar's Export option allows users to download all fields for articles to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use article data with other software such as Microsoft Excel. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of articles. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Users with access to the Reports module have the option of creating or accessing reports containing specifically chosen fields for articles and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the

Please note that your ability to export articles from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export optio n.

Tags

Tags are similar to folders and enable you to categorize articles according to specific criteria, such as a topic, to make locating articles easier. When you tag an article, the system creates a link between the tag and the article which resides in the Sugar database. An article can be linked with more than one tag. Similarly, a tag can be linked with multiple articles. Tags can be parent tags or child tags. Parent tags are the top most category and child tags are nested within parent tags.

Creating Tags

Administrative users can create tags from the Knowledge Base Administration page. For more information on how to create tags from Knowledge Base Administration please refer to the Knowledge Base Administration document in the administration guide. Users who do not have admin or developer access can create tags while creating or editing an article.
Use the following steps to create a tag while creating or editing an article:

1. From the article's edit view, click "Select" in the Tags field.

2. This opens up the tags dialog box where you can search and select existing

tags. Click "Create New Tag".

Note : The numbers next to the tag name indicate the number of articles currently tagged.

3. The dialog then prompts you to select a parent tag. Click any tag in the tree to nest the new tag underneath. If the tag you are creating should be a new parent tag, select "Tags" in the tree to add the new tag to the same level as the other parent tags.

4. Click "Save" to complete the tag creation.

5. The tags dialog box remains open for you to continue creating new tags, or select the appropriate tag to add it to the article.

Deleting Tags

Administrative users can delete tags entirely from the system, but only if the tag does not have any articles assigned to it. For more information on how to delete tags from Sugar, please refer to the Knowledge Base Administration documentation in the administration guide. Users who do not have admin or developer access can delete a tag off of an article while creating or editing an article.
Use the following steps to delete a tag from an article while creating or editing the article:

1. From the article's edit view, click the trash can icon in the Tags field next to the tag you wish to remove.

2. If you have added the tag during this edit of the article, the trash icon is replaced with a minus icon.
3. Once the necessary tags have been removed, click "Save".

Send Article as Email

Sugar allows users to create an email based off of the content of a Knowledge Base article. Please use the following steps to send an email from an article's detail view:

1. Navigate to an article's detail view.
2. Select "Send Email" from the Actions menu.

3. This launches a compose email within the emails module. The body of the article is automatically placed in the body of the email and the title of the article is set as the subject of the email.

4. Populate any recipients and optionally attach the email to a record in Sugar via the Related To field and click "Send"

For more information on sending emails from the Emails module, please refer to the Emails documentation.

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Bugs

Overview

Sugar's Bug Tracker module is used to track and manage product-related problems, commonly referred to as bugs or defects, either found internally or reported by customers. The bugs can be further triaged by tracking the found and fixed in release. The Bug Tracker module gives users a way to quickly review all details of the bug and the process being used to rectify it. Once a bug is created or submitted, you can view and edit information pertaining to the bug via the Bugs detail view. Each bug record may then relate to other Sugar records such as calls, contacts, cases, and many others. This documentation will cover how to use the Bug Tracker module as well as the various actions and options available from within the module.

Note: This module is hidden by default. The administrator must display it for your use.

Bug Fields

The Bug Tracker module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

Field	Description
Assigned To	The Sugar user assigned to the bug
Category	The general area of the product or service where the bug was discovered
Date Created	The date the bug report was created
Date Modified	The date the bug report was last modified
Description	Explanation of the details and reproduction steps of the bug when submitted
Fixed in Release	The version of product where the bug was fixed

Found in Release	The version of product where the bug was found
Number	An automatically incremented number to identify every bug, which cannot be edited through Sugar
Priority	Specify the urgency of the bug from this dropdown list
Resolution	Results of the investigation of the bug and how it can be fixed
Show in Portal	Check this checkbox if customers should be able to view this record via the Portal if applicable
Source	The method in which this bug was submitted, (e.g. internal, customer email, etc.)
Status	Specify the status of the bug as it moves along the process from submission to resolution
Subject	Brief statement of the problem
Teams	The Sugar team(s) assigned to the bug
Type	Type of categorization that this bug falls in to (e.g. Defect, Feature, etc.)
Work Log	Free form field to add activities and actions while working on the bug

Bugs Module Tab

The Bug tracker module tab is located on the navigation bar at the top of any Sugar screen. Click the tab to access the Bug Tracker list view. You may also hover on the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of bugs you last viewed in the module. The

The Bug Tracker menu allows you to perform the following operations:

Menu Item	Description
Report Bug	Opens the edit view layout to report a new bug
View Bugs	Opens the list view layout to search and display bugs
View Bug Reports	Displays existing reports based on the Bug Tracker module
Import Bugs	Opens the import wizard to create or update bug reports using external data

If you do not see the Bug Tracker module tab in Sugar, please check the following:

- The top navigation bar may be filtered based on a specific tab grouping (e.g. Activities, Reports, etc.) of which the Bug Tracker module is not a member. Click the More tab (last tab on navigation bar) then hover on "Filter Menu By" to check how the navigation bar is grouped. For more information on tab grouping, please refer to the User Interface documentation.
- The Bug Tracker module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Bug Tracker module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Bug Tracker module for your entire Sugar instance. Reach out to your Sugar administrator to have the Bug Tracker module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

Creating Bugs

There are various methods for reporting bugs in Sugar including via the Bug Tracker module, quick create, duplication, and importing bugs. The full edit view layout opens when creating the bug report directly from the Bug Tracker menu and includes all of the relevant fields for your organization's bugs. The quick create form is a shortened version of the bugs edit view and typically contains fewer fields. When using quick create to submit a bug while viewing an existing record of another module, Sugar automatically creates a relationship between both records. For example, if you are viewing a case record and create a new bug report via the quick create form, the Cases subpanel in the bug record will automatically populate with the case you were working on, thus creating the relationship. Both the edit view and quick create layouts can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the documentation in the Administration guide.

Creating Via Bugs Module

One of the most common methods of bug submission is via the Report Bug option in the Bugs module tab. This opens up the edit view layout which allows you to enter in all the relevant information for the bug.
Use the following steps to submit a bug via the Bug Tracker module:

1. Hover on the Bug Tracker module and select "Report Bug".

2. Enter appropriate values for the <u>fields</u> in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving. Note: Number is marked with a red asterisk as it is a required field, but no value is required to be added for the save to occur.
3. Once the necessary information is entered, click "Save".

Create

Save | Cancel

⋀ Overview

Number: *

Subject: *   Unable to log in after upgrade

Priority: Urgent

Source: Email

Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also quick create a bug submission from any Bugs subpanel on related module records.
Use the following steps to submit a bug via Quick Create:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Report Bug" or select "Create" on any Bugs subpanel on a related module's detail view.
   Note: The Quick Create menu can be reconfigured by administrators via Admin > Configure Navigation Bar Quick Create. For more information on configuring layouts, please refer to the Configure Navigation Bar Quick Create documentation in the Administration guide.
   From Quick Create menu:

   From subpanel:

2. Enter appropriate values in the [fields](#) in the quick create form. All required fields are marked with a red asterisk and must be completed prior to saving.
3. If additional fields are desired, click the Full Form button to use edit view instead.
4. Once the necessary information is entered, click "Save".

Creating Via Duplication

You can also create a new bug report by duplicating an existing bug. The duplicate option is useful if the bug you are creating has similar information to an existing bug, such as similar reproduction steps, or you are creating it to tie it to a different version of your product.

Use the following steps to create a bug by duplicating an existing record:

1. Navigate to a bug record's detail view.
2. Click the Actions menu and select "Duplicate".

3. The displayed edit view is pre-populated with the original bug's values. Update the necessary fields, then click "Save".
   Note: Number is not duplicated and a unique number is generated upon saving the duplicate bug report.

Creating Via Email

Users in Sugar can launch a quick create form to create a bug report from an external email or from an imported email. From the emails pane in the Emails module, click "Quick Create" and select "Bug".

The quick create form opens in a popup window. The subject and description fields

for the bug are populated by default with the subject and body of the email. All required fields are marked with a red asterisk and must be completed prior to saving. Once the necessary information is entered, click "Save".

The email selected will then be imported, if not already, and will be related to the new bug report. A relationship will be made between the email and the bug created via the flex relate field.

Importing Bugs

The import function allows you to push multiple bug reports into Sugar using a comma (or other character) delimited file instead of creating them one-by-one. For more information on importing, please refer to the [Import](#) documentation.

Use the following steps to import bug reports via the Import Bugs option:

1. Hover on the Bug Tracker module tab and select "Import Bugs".

2. In Step 1, select the source of the data you are importing. Click "Next".
3. In Step 2, select the import file and choose "Create new records only". Click "Next".
4. In Step 3, confirm the import file properties. Click "Next".
5. In Step 4, confirm the field mappings for the import. Click "Next".
6. In Step 6, view the import results.
   - The Created Records tab will show all of the new bug records.
   - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
   - The Errors tab will show records that were not imported due to errors detected during import.

Viewing Bugs

There are various options available for viewing bug reports in Sugar including via Bug Tracker list view, Bug Tracker detail view, Bug Tracker Last Viewed menu, dashlets, and reports. Please note that you will only be able to see bug records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Teams](#) and [Roles](#) documentation in the Administration guide.

Viewing Via List View

The Bug Tracker list view displays all bug reports meeting the current search criteria. To access the list view, simply click the Bug Tracker module tab. While list view shows key bug fields, you can click the bug's subject to open the record in detail view. For more information on viewing bugs via list view, please refer to the

Viewing Via Detail View

The Bug Tracker detail view displays thorough bug information including all bug fields followed by subpanels of the bug's related records belonging to various modules. The detail view can be reached by clicking a bug record's link from anywhere in the application including from the Bug Tracker list view. For more information on viewing bugs via detail view, please refer to the [Bugs Detail View](#) section of this documentation.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which bugs you have recently viewed. Hover on the Bug Tracker [Module Tab](#) to see a list of your most recently viewed bugs and click each name to open the bug in detail view.

Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets which allow users to get a quick view of various records, activities, reports, etc. You can view bug information in bug-based dashlets such as "My Assigned Bugs" as well as in dashlets based on other modules such as "My Calls". Clicking a bug's subject from any dashlet will open the bug report in detail view. For more information on using dashlets and viewing bug records via dashlets, please refer to the Modules section of the Home documentation.

Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding bugs and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the bug report's detail view by clicking the bug's subject in the report results. Please note that you can only directly access bug detail views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation.

Name: Open Bugs
Modules: Bugs
Display Columns: Number, Subject, Priority, Status, Type
Schedule: None
Filters: None

Type: Rows and Columns Report
Teams: Global
Assigned to: Administrator

			(1 - 51 of 51)	
Number ⇔	**Subject** ⇔	**Priority** ⇔	**Status** ⇔	**Type** ⇔
51	Syntax error appears when running old reports 🖉	Urgent	New	Defect
34	Warning is displayed in file after exporting 🖉	Medium	New	Feature

In addition to navigating to the Reports module and finding or building relevant reports, you can use the Bug Tracker module tab's View Bug Reports option to see all bug-based reports to which you have access.

Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the [Roles](#) documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

Searching Bugs

The Bugs list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Bugs list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your

search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %system). This will pull up any record that has the word "system" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.

The buttons and checkboxes available in Basic Search panel have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Items : Select this box to return only records assigned to you.
- My Favorites : Select this box to return only records you have marked as favorites.
- Open Items : Select this box to return records where the status is not Closed or Rejected.

Search Bug Tracker

| Subject | | My Items ☐ My Favorites ☐ Open Items ☐ | Search | Clear | **Advanced Search** |

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Items" and enter a bug subject, Sugar will only return bug records with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view Link needed below the search panel. To see all bug records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see bug records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide.

Administrators can configure what fields appear on the Bugs Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Advanced Search

Advanced Search offers a more in-depth search experience than Basic Search including additional fields, layout options, and saved search capability. From the Advanced search panel, you can click "Basic Search" for simplified searching.

The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Favorites : Select this box to return only records you have marked as favorites.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the Layout Options section of the Search documentation.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section of the Search documentation.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select "My

Favorites" and enter in a bug subject to search, Sugar will only return bug records with a matching name that you have marked as favorites. When searching by a multiselect or dropdown field (e.g. "Assigned to"), however, Sugar will return records matching any of these selections. Once the search completes, the relevant results will populate in the list view below the search panel. To see all bug reports to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see bug reports as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide.

Administrators can configure what fields appear on the Bugs Advanced Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search may be used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.

To use global search, you need to first enter the keyword into the search box. With Full Text Search enabled, pop-up results will begin appearing once you input three or more characters. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. When Full Text Search is not enabled, results starting with your keyword will appear after clicking the magnifying glass icon or hitting your Return/Enter key. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.
Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Studio documentation as well as the Search section of the System documentation in the Administration guide.

Bugs List View

The Bugs list view displays all bug reports meeting the current search criteria and to which your user has access. You can view the basic details of each bug within the field columns. Please note that you will only be able to see bug records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Teams](#) and [Roles](#) documentation in the Administration guide.

You have the option to change what fields are displayed in list view by configuring your layout options in the Bugs Advanced Search. For more information on configuring your list view, please refer to the [Layout Options](#) section of the Search documentation. Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Pagination

List view displays the current search results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. To the right just below the search panel you can see which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of your current results.

By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.

Subject		My Items ☐ My Favorites ☐ Open Items ☐	Search	Clear	**Advanced Search**	⑦
☐ ▾	Delete ▾			|< < (1 - 20 of 48) > >|	

Checkbox Selection

You can perform several actions on bug reports directly from the list view by first selecting the desired records. To select individual bug reports on the Bugs list view, mark the checkbox on the left of each row. To select or deselect multiple bug reports on the list view, use the options in the checkbox dropdown menu:

- Select This Page : Selects all records shown on the current page of contact results.
- Select All : Selects all records in the current search results across all pages of bug results.
- Deselect All : Deselects all records that are currently selected.

Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.

The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Delete	Delete one or more bug reports at a time
Mass Update	Mass update one or more but reports at a time
Merge	Merge two or more duplicate bug reports
Export	Export one or more bug reports to a CSV file

Favorite Designation

Users have the option to mark bug reports as favorites via the list view as well as the detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Bug Tracker module tab. In the Bugs list view, the star on the left of each bug's row is yellow once marked to indicate a favorite bug. For more information on how to mark records as favorites, please refer to the Favoriting Bugs section of this documentation.

More Information

Additional details for each bug can be viewed by clicking the "i" icon to the far right of each list view row. This provides users a quick view of additional bug information in addition to what appears in the display column fields. The resulting pop-up window will show the Date Created, Source, Category, Resolution, Description, and Work Log fields by default if they are populated. The list of fields appearing here may only be configured through a code-level customization.

Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time. You can also set a default order-by column using the layout options in Advanced Search. For more information on setting a default column sort, please refer to the Layout Options section of the Search documentation.

Bugs Detail View

The Bugs detail view displays thorough bug report information including all bug fields which are grouped by default into the Overview and Other panels. You can also view a bug's related records (Activities, Contacts, Cases, etc.) which appear in subpanels beneath the bug fields. The detail view can be reached by clicking a bug report's link from anywhere in the application including from the Bugs list view.

Please note that you will only be able to view a bug report according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Actions Menu

The Actions menu on the top left of each bug's detail view allows you to perform various actions on the current record. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the System documentation in the Administration guide.

The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Edit	Edit this bug report
Duplicate	Duplicate this bug report
Delete	Delete this bug report
Find Duplicates	Locate potential duplicates of this bug report

| View Change Log | View a record of changes to this bug report |

Favorite Designation

Users have the option to mark bug records as a favorite via the detail view as well as the list view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via search or from the Bug Tracker module tab. In the Bugs detail view, the star on the right of the bug's subject is yellow once marked to indicate a favorite bug. For more information on how to mark records as favorites, please refer to the Favoriting Bugs section of this documentation.

Next or Previous Record

On the upper right of the Bugs detail view, there are two buttons that allow you to page through each bug in the Bugs list view's current search results. Clicking the Previous button displays the previous bug report of the current search results while clicking the Next button displays the next bug report of the current search results. The text in between shows which bug result you are currently viewing within the total number of current results.

Subpanels

Beneath a bug report's fields are subpanels containing related records from

various modules, communication history regarding the bug, and what cases are examples of reports from customers of the bug.

Related Record Subpanels

The most common type of subpanels displayed on a bug's detail view contains the bug's related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. Out of the box, the Bug Tracker module does not include any relationships to other modules that would cause a related record to be displayed in the field listing. However, for example, a bug may be related to multiple cases. This means that the cases will be displayed in a subpanel beneath the fields listing.

Users with administrator or developer access have the ability to change the fields (e.g. Subject, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the [Studio](#) documentation in the Administration guide.

Related record subpanels allow the following operations to be performed. Please note that administrators in Sugar can change the subpanel's Action menu to be displayed as separate buttons instead of a dropdown via Admin > System Settings. For more information, please refer to the [System](#) documentation in the Administration guide.

- To view the details of a related record, click the record's name in the subpanel to open it in detail view.
- To relate an existing record to the bug, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the bug, choose "Create" from the subpanel's Action menu, then complete the quick create form and click "Save".
- To delete the bug's relationship to a record, choose "Unlink" from the dropdown on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

Please note that administrators can prevent users from moving subpanels to different locations in the detail view. For more information on preventing rearranging of subpanels, please refer to the [System](#) documentation in the Administration guide. Check with your system administrator if you are not able to rearrange your subpanels.

Activities and History Subpanels

The Activities subpanel lists open or upcoming tasks, calls, and meetings that are related to the bug report. Once the activities have taken place or are completed, they will instead appear within the History subpanel. The History subpanel also includes notes and emails associated with the bug record. For more information on the history and activities subpanel, please refer to the User Interface documentation.

Editing Bugs

Bugs may be edited at any time to update or add information to the record. You can make changes to existing bug records via the Bug Tracker edit view and quick create forms. Edit view is available within the Bugs module and includes all of the Bug Tracker fields you should need.

Quick create is available for editing bugs from outside the Bugs module and opens as a pop-up without navigating away from your current page. It generally contains fewer fields, but the Full Form button may be used to access the full edit view should you need to edit additional fields.

Please note that your ability to edit bug reports in Sugar may be restricted by a role. For more information on roles, please refer to the Roles documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure both the Bugs edit view and quick create via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

Editing Via Detail View

You can edit bugs via the [detail view](#) by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve the changes made.

Editing Via List View

You can edit bugs via the [list view](#) by clicking the Pencil icon to the left of each bug's subject. A pop-up window will open with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes.

Editing Via Dashlets

You can edit bugs by clicking the pencil icon to the far right of any bugs-based dashlet on your Sugar home page. For example, clicking the pencil icon within the My Assigned Bugs dashlet will open a pop-up window with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. For more information on dashlets, please refer to the [Home](#) documentation.

Editing Via Reports

Sugar reports also allow you to edit a bug report by clicking on the pencil icon next to a bug's subject. This opens a pop-up window with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. Please note that you may only directly edit bugs from Rows and Columns-type or Summation with Details-type reports as Summation-type and Matrix-type reports do not include the pencil icon. For more information on reports, please refer to the Reports documentation.

Deleting Bugs

If a bug report is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Bugs detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting bug records will not delete the related records and will only remove the relationship.

Please note that your ability to delete bugs in Sugar may be restricted by a role.

For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

Deleting Via Detail View

Use the following steps to delete a bug report via the detail view:

1. Navigate to a bug report's detail view.
2. Select "Delete" from the Actions menu.

3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Mass Deleting Via List View

Use the following steps to delete one or more bugs via the list view:

1. Navigate to the Bugs list view by clicking the Bug Tracker module tab.
2. Use the [Basic](#) or [Advanced Search](#) to find the bugs you wish to delete.
3. Select the desired bug records individually or using the [Checkbox Dropdown's](#) options.
4. Choose "Delete" from the Actions menu.

5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Due to PHP memory limitations on the server, there may be occasions when the application times out while deleting a large number of bug reports. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Exporting Bugs

Sugar's Export option allows users to download all fields for the selected bugs to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Bug Report data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered bugs back into Sugar. For more information on updating existing records via import, please refer to the [Import](#) documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of bug reports. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Bugs may be exported from the Bugs list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for bugs and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the [Export](#) documentation.

Please note that your ability to export bugs from Sugar may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

Mass Updating Bugs

Mass Updating allows users to make the same change to multiple bug reports at

once from the Bugs list view. Users with administrator or developer level access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the [Studio](#) documentation in the Administration guide. Due to the PHP memory limitations on the server, there may be occasions when the application times out while mass updating a large number of bug reports. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Please note that your ability to mass update bugs may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

Use the following steps to mass update bug reports from the list view:

1. Navigate to the Bugs list view by clicking the Bug Tracker module tab.
2. Use the list view's [Basic](#)or [Advanced Search](#)to identify bugs you wish to modify.
3. Select the desired bugs individually or using the[Checkbox Dropdown's](#) options.
4. Choose "Mass Update" from the Actions menu.

5. Scroll to the Mass Update panel and set values for the fields you wish to alter. Note: For the Teams field, use "Replace" to remove existing team assignments before adding those specified here. Use "Add" to add the teams specified here to any existing team assignments.

6. Click "Update" to save the changes to all of the currently selected bug reports.

Finding Duplicate Bugs

Between multiple users working in Sugar and importing new records it is possible for duplicate bug reports to be accidentally input to the system. Before creating a new bug report, a good practice is to first check that the same issue does not already exist in Sugar. You can locate duplicate records for cleanup using Basic and Advanced Search from the Bugs list view. Searching for bugs with similar names, categories, or other information can turn search a powerful, duplicates-finding tool. Sugar also provides a wizard for finding potential duplicates that is available from the Bugs detail view and may be used as shown below. If duplicate bug reports are detected, you can perform a merge per the Merging Bugs section of this documentation.

Please note that your ability to use the Find Duplicate action may be restricted by any role that prevents bug deletion. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide.Check with your system administrator if you do not see the Find Duplicates option.

Use the following steps to locate duplicate bugs using the Find Duplicates option from the Bugs detail view:

1. Navigate to a bug report's detail view
2. Choose "Find Duplicates" from the Actions menu

3. Move any fields you wish to use in identifying duplicates to the list on the right by selecting the field and clicking the arrow

4. Click "Next Step" to display a list of potential duplicate bug records which match all of the specified filters

Once you determine which bugs of the resulting list are indeed duplicates of your original record, select the duplicates by marking the checkboxes, then click "Perform Merge" to begin a merge with the current record. Instructions for the merge process that follows can be found in the Merging Via Detail View section of this documentation.

Merging Bugs

When duplicate records are identified in Sugar, you have the option to merge two or more bugs into a single record. Once the merge is complete, the duplicate bug report(s) will be deleted, and the primary record will remain. Please note that all relationships belonging to the duplicate bugs will be merged to the primary record meaning that any cases, meetings, contacts, etc. related to the duplicate bug report(s) will automatically be related to the resulting, merged bug report.

Merging Via Detail View

Use the following steps to merge bugs via the Bugs detail view:

1. Navigate to a bug report's detail view.
2. Use the Find Duplicates option as shown in [Finding Duplicate Bugs](#) to identify duplicate bugs.
3. Possible duplicates will be displayed in the results list. Select the duplicate record(s).

4. Click "Perform Merge" to display the Merge Bugs page. The primary record's field values are displayed on the left while other records' values are in columns to the right. Saving the merge will preserve only the leftmost values for each field into a single bug record.

5. To change which record is considered the primary, click the "Set as primary" double arrows.
6. Review the field values in each column and use the associated double arrows to move the best value for each field to the leftmost column.
7. Click "Save Merge" once the left column contains all fields you wish to appear on the single, merged record.
8. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Ok" to proceed.

Merging Via List View

[Basic](#) and [Advanced Search](#) may be used to identify duplicate bugs by, for example, searching for bugs with similar names or categories. Once your search has identified duplicate bug reports, you can merge them directly from the Bugs list view.

Use the following steps to merge bugs via the list view:

1. Use the list view's [Basic](#)or [Advanced Search](#)to identify duplicate bug reports.
2. Possible duplicates will be displayed in the list view. Select the duplicate record(s) that you wish to merge.

3. Select "Merge" from the Actions menu to display the Merge Bugs page. The primary record's field values are displayed on the left while other record's values are in columns to the right. Saving the merge will preserve only the leftmost values for each field into a single bug record.

4. To change which record is considered the primary, click the "Set as primary" double arrows.
5. Review the field values in each column and use the associated double arrows to move the best value for each field to the leftmost column.
6. Click "Save Merge" once the left column contains all fields you wish to appear on the single, merged record.
7. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Ok" to proceed.

Favoriting Bugs

Each Sugar user has the option to designate their own favorite bugs which are important or will be viewed often so that they can easily be accessed via search or from the Bug Tracker module tab. Once records are marked as favorites, use the My Favorites checkbox in the [Basic](#) or [Advanced Search](#) to retrieve your favorites or select from your most recent favorites directly from the [Bug Tracker Module Tab](#).

Favoriting Via List View

Use the following steps to mark records as favorites via the Bugs list view:

1. Navigate to the Bugs list view by clicking the Bug Tracker module tab.
2. Use the [Basic](#)or [Advanced Search](#)to find the Bug reports you wish to mark as favorites.
3. Mark the star icon on the left of each desired bug's row.
4. To remove the bug as a favorite, click the star again to revert it to white.

		Num. ⇕	Subject ⇕	Status ⇕	Type ⬆	Priority ⇕
⭐	✎	26	Fatal error during installation	Closed	Defect	High
⭐	✎	5	Fatal error during installation	Pending	Defect	Low

Favoriting Via Detail View

Use the following steps to mark records as favorites via the Bugs detail view:

1. Navigate to a bug report's detail view.
2. Click the star icon to the right of the bug's name in the upper left of the detail view to designate it as a favorite.
3. To remove the bug as a favorite, click the star again to revert it to white.

Viewing Bugs Change Logs

Changes made to each bug record are tracked over time, and users are able to view the history of changes via the change log in each bug's detail view. To view the change log, navigate to a bug in detail view and select "View Change Log" from the Actions menu. Please note that only fields marked as "Audit" in Admin > Studio will be displayed in the change log. For more information on designating for audit, please refer to the [Studio](#) documentation in the Administration guide.

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Projects

Overview

Sugar's Projects module is used to track a variety of tasks in order for a project manager to properly organize and complete a given project. Projects are tracked using both a project grid and a Gantt chart. Resources (e.g. contacts and users) can be allocated to the tasks of each project to helpe ensure your deadlines are met.

Projects are also able to be associated to different [accounts](#), [contacts](#), [opportunities](#), or other modules so that if a project is a direct result of one of these

modules, such as the project being performed that was purchased through an opportunity, the relationship will show and alternate details be made available.

Note: This module is hidden by default. The administrator must [enable it](#) for your use.

Project Fields

The Projects module contains the following fields which enable users to create and properly organize projects.

Field	Description
Assigned to	Enter the name of the user who has ownership of the project, which is assigned to you by default
Date Created	The date the project record was created
Date Modified	The date the project record was last modified
Description	Enter a brief description of the project
End Date	Click the Calendar icon and select the project end date
Name	Enter a name for the project
Priority	Select the importance of the project from the dropdown list, such as Low, Medium, or High
Start Date	Click the Calendar icon and select the project start date
Status	Select a value from the dropdown list such as Draft, In Review, or Published to show the approval status of the project
Team	The Sugar team(s) assigned to the project

Projects Module Tab

The Projects module tab is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access the Projects list view. You may also hover on the tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The [Recently Viewed](#)

menu displays the list of projects you last viewed in the module.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Project	Opens the edit view layout to create a new project
Create Project Template	Opens the edit view layout to create a new project template
View Project List	Opens the list view layout to search and display projects
View Project Templates	Opens the list view layout to display project templates
View Project Tasks	Opens the list view layout to search and display project tasks
View My Projects Dashboard	Opens the Projects Dashboard

If you do not see the Projects module tab in Sugar, please check the following:

- The top navigation bar may be filtered based on a specific tab grouping (e.g. Activities, Reports, etc.) of which the Projects module is not a member. Click the More tab (last tab on navigation bar) then hover on "Filter Menu By" to check how the navigation bar is grouped. For more information on tab grouping, please refer to the User Interface documentation.
- The Projects module may be marked as hidden in your user preferences, which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Projects module in the Hide Modules list, simply move it to the Display Modules list and save. For more information

on hiding and displaying modules, please refer to the [Layout Options](#) section of the Getting Started documentation.
- The administrator may have disabled the Projects module for your entire Sugar instance. Reach out to your Sugar administrator to have the Projects module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the [Developer Tools](#) documentation in the Administration guide.

Creating Projects

The three methods for creating projects in Sugar are via the Projects module, via Quick Create, and via Project Templates. The full edit view layout opens when creating the project directly from the Projects menu and includes all of the relevant fields for your organization's projects. The quick create form is a shortened version of the projects edit view and can contain fewer fields. When using quick create to make a project while viewing an existing record of another module, Sugar automatically creates a relationship between both records. For example, if you are viewing an account record (e.g. ABC Company) and create a new project via the quick create form, the Accounts subpanel in the project record will automatically populate with "ABC Company", thus creating the relationship. Both the Edit View and Quick Create layouts can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#) documentation in the Administration guide.

Creating Via Projects Module

One of the most common methods of project creation is via the Create Project option in the Projects module tab. This opens up the edit view layout, which allows you to enter in all the relevant information for the project.
Use the following steps to create a project via the Projects module:

1. Hover on the Projects module and select "Create Project".

2. Enter appropriate values for the [fields](#) in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".

Creating Via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also easily create new records from any Projects subpanel on related module records.

Use the following steps to create a project via Quick Create:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Project" or select "Create" on any Projects subpanel on a related module's detail view.
   From Quick Create:

    From Subpanel:

2. Enter appropriate values in the [fields](#) in the quick create form. All required fields are marked with a red asterisk and must be completed prior to saving.
3. If additional fields are desired, click the Full Form button to use edit view instead.
4. Once the necessary information is entered, click "Save".

Creating Via Project Template

Project Templates are used when a similar project is going to be configured time and time again. See [Project Templates](#) for more information. After you have a template already created, you can use the template to create additional projects, following these steps:

1. Hover on the Projects module and select "View Project Templates".

2. While on the Project Template list view, click the name of your template to open the template's detail view.

3. Select "Save as Project" from the Actions menu.

4. Change the name of your new project as need be and click "Save as New Project", where you will be brought to the detail view of your new project.

Viewing Projects

There are various options available for viewing projects in Sugar including via Projects list view, Projects detail view, Projects Recently Viewed menu, the Project Dashboard, dashlets, and reports. Please note that you will only be able to see projects records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Teams] and [Roles] documentation in the Administration guide.

Viewing Via List View

The Projects list view displays all project records meeting the current search criteria. To access the list view, simply click the Projects module tab. While list view shows key project fields, you can click the project's name to open the record in detail view. For more information on viewing project via list view, please refer to the [Projects List View] section.

Viewing Via Detail View

The Projects detail view displays thorough projects information including all project fields followed by subpanels of the project's related records belonging to various modules. The detail view can be reached by clicking a project record's link from anywhere in the application including from the Projects list view. For more information on viewing projects via detail view, please refer to the [Projects Detail View] section.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which projects and project templates you have recently viewed. Hover on the [Projects module tab](#) to see a list of your most recently viewed projects and click each name to open the project in detail view.

Viewing Via Project Dashboard

The Project Dashboard allows users to view upcoming and overdue project tasks, as well as any support cases related to projects the user is assigned to. It also allows an option for users to view any upcoming or overdue project tasks that are assigned to the user. The Project Dashboard can be reached by clicking the appropriate link in the [Projects module tab](#).

The "My Projects Dashboard" panel shows four columns, showing projects that are assigned to you, any overdue project tasks where the Finish Date is in the past, any upcoming project tasks where the Start Date is within the next week, and any cases that are open related to the project.

The "My Project Tasks" panel shows two columns, showing any overdue project tasks assigned to you where the Start Date is in the past, any upcoming project tasks assigned to you where the Finish Date is within the next week.

All record references, for projects, project tasks, or cases, on either panel, are clickable and will bring you to either the detail view for the specific record or the Gantt chart of the parent project.

Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets, which allow users to get a quick view of various records, activities, reports, etc. You can view project information in project-based dashlets such as "My Project Tasks" as well as in dashlets based on other modules such as "My Calls". Clicking a project's name from any dashlet will open the project in detail view. For more information on using dashlets and viewing project records via dashlets, please refer to the [Modules](#) section of the Home documentation.

Viewing Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding projects and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the project record's detail view by clicking the project's name in the report results. Please note that you can only directly access project detail views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display

columns. For more information on using reports, please refer to the [Reports](#) documentation.

Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the [Roles](#) documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

Searching Projects

The Projects list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Projects list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the [Search](#) documentation.
Note: Projects is hidden from Global Search by default. The administrator must [enable it](#) for your use.

Basic Search

Basic search offers a few, commonly used fields for a simplified search experience.

From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.

The buttons and checkboxes available in Basic Search panel have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Items : Select this box to return only records assigned to you.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Items" and enter a project name, Sugar will only return projects with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all projects to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see projects as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide.

Administrators can configure what fields appear on the Projects Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Advanced Search

Advanced Search offers a more in-depth search experience than Basic Search including additional fields, layout options, and saved search capability. From the Advanced search panel, you can click "Basic Search" for simplified searching.

The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.

- Layout Options : Use the expandable [Layout Options](#) section to configure your list view. For more information, please refer to the Layout Options section of the Search documentation.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the [Saved Search](#) section of the Search documentation.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select "My Items" and enter in a project name to search, Sugar will only return projects with a matching name that are assigned to you. When searching by a multiselect or dropdown field (e.g. "Status"), however, Sugar will return records matching any of these selections. Once the search completes, the relevant results will populate in the [list view](#) below the search panel. To see all projects to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see projects as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Teams](#) and [Roles](#) documentation in the Administration guide.

Administrators can configure what fields appear on the Projects Advanced Search via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Beginning with version 6.5.0, Full Text Search may be used with Global Search to search throughout nearly all fields and modules for an enhanced search experience. The Global Search bar is located on the top right hand side of Sugar. You can click the magnifying glass icon or hit Return/Enter to perform your search once the text string is entered in the search box.

To use global search, you need to first enter the keyword into the search box. With Full Text Search enabled, pop-up results will begin appearing once you input three or more characters. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. When Full Text Search is not enabled, results starting with your keyword will appear after clicking the magnifying glass icon or hitting your Return/Enter key. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Studio documentation as well as the Search section of the System documentation in the Administration guide.

Projects List View

The Projects list view displays all projects meeting the current search criteria and to which your user has access. You can view the basic details of each project within the field columns. Please note that you will only be able to see projects as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide.

You have the option to change what fields are displayed in list view by configuring your layout options in the Projects Advanced Search. For more information on configuring your list view, please refer to the Layout Options section of the Search documentation. Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Pagination

List view displays the current search results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. To the right just below the search panel you can see which records of the total results set are

currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of your current results.

By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.

Checkbox Selection

You can perform several actions on projects directly from the list view by first selecting the desired records. To select individual projects on the Projects list view, mark the checkbox on the left of each row. To select or deselect multiple projects on the list view, use the options in the checkbox dropdown menu:

- Select This Page : Selects all records shown on the current page of project results.
- Select All : Selects all records in the current search results across all pages of project results.
- Deselect All : Deselects all records that are currently selected.

Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.

The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Delete	Delete one or more projects at a time
Mass Update	Mass update one or more projects at a time
Export	Export one or more projects to a CSV file

More Information

Additional details for each project can be viewed by clicking the "i" icon to the far right of each list view row. This provides users a quick view of additional project information in addition to what appears in the display column fields. The resulting pop-up window will show the Description field by default. The list of fields appearing here may only be configured through a code-level customization.

Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time. You can also set a default order-by column using the layout options in Advanced Search. For more information on setting a default column sort, please refer to the Layout Options section of the Search documentation.

Projects Detail View

The Projects detail view displays thorough project information including all project fields, which are grouped by default into the Overview and Other panels. You can also view a project's related records (Activities, Opportunities, Cases, etc.), which appear in subpanels beneath the project fields. The detail view can be reached by clicking a project's link from anywhere in the application including from the Projects list view.

Please note that you will only be able to view a project record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Actions Menu

The Actions menu on the top left of each project's detail view allows you to perform various actions on the current record. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the System documentation in the Administration guide.

The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Edit	Edit this project
Delete	Delete this project
View Gantt	View the project's Gantt chart
Save As Template	Save this project as a template for future use

| Export To MS Project | Export this project to an MPX file for use with Microsoft Project |

Next or Previous Record

On the upper right of the Projects detail view, there are two buttons that allow you to page through each project in the Project list view's current search results. Clicking the Previous button displays the previous project of the current search results while clicking the Next button displays the next project of the current search results. The text in between shows which project result you are currently viewing within the total number of current results.

Create new plan for the annual audit

Edit ▼   ◄ (1 of 123) ►

⌃ Overview
    Name: Create new plan for the annual audit   Status: Draft

Subpanels

Beneath a project's fields are subpanels containing all of the users and contacts that are working on the project, the project's tasks that need to be done, any holidays or days off of the project so they will not be included in the date and time calculations, and related records from various modules.

Please note that administrators can prevent users from moving subpanels to different locations in the detail view. For more information on preventing rearranging of subpanels, please refer to the System documentation in the Administration guide. Check with your system administrator if you are not able to rearrange your subpanels.

Resources Subpanel

The Resources subpanel is used to add specific Sugar users and contacts to the project. When these users and contacts are added to the project, they will be available to be added as resources on project tasks via the Gantt chart, meaning they are the responsible party for the task. For more information on project resources, please review the Project Resources section of this documentation.

The Resources subpanel allows the following operations to be performed:

- To view the details of a related user or contact, click the Users or Contacts icon in the subpanel to open it in detail view.
- To relate an existing user or contact to the project, choose the appropriate "Select" option from the subpanel's Action menu, then locate and select the desired record.
- To remove the resource from the project, click "Unlink" from the dropdown on the far right of the record's row. This removes the relationship, but does not delete any actual records.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

Note: If you are not able to view this subpanel, the administrator may have disabled the Projects subpanel for your entire Sugar instance. Reach out to your Sugar administrator to have the subpanel displayed. For more information on displaying and hiding subpanels throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

Project Tasks Subpanel

The Project Tasks supanel lists all of the project's Project Tasks and basic details of each task. When a task is added to the project via the Gantt chart, the project task will appear on this subpanel. The Project Tasks subpanel allows the following operations to be performed:

- To view the details of a project task, click the record's name in the subpanel to open it in detail view.
- To add additional tasks to the project, click the "View Gantt" button from the subpanel's header and follow the information provided in Creating Project Tasks section of this documentation.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the

subpanel's header.

Project Holidays Subpanel

The Project Holidays subpanel lists all of the resources' days that they will not be working. The subpanel includes columns showing the resource's name, the date of the holiday, and a description of the holiday. For more information on Project Holidays, please refer to the Project Holidays section of this documentation. The Project Holiday's subpanel allows the following operations to be performed:

- To add additional holidays to the project, click the "Create" button from the subpanel's header and fill in the necessary fields.
- To remove the holiday from the project, click "Unlink" from the dropdown on the far right of the record's row.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

Activities and History Subpanels

The Activities subpanel lists open or upcoming tasks, calls, and meetings that are related to the project. Once the activities have taken place or are completed, they will instead appear within the History subpanel. The History subpanel also includes notes and emails associated with the project. For more information on the history and activities subpanel, please refer to the User Interface documentation.

Related Record Subpanels

The most common type of subpanels displayed on a project's detail view contain the project's related records belonging to various modules. The relationship type

determines whether a related record will be displayed in the field listing or in a subpanel. Out of the box, the Projects module does not include any relationships to other modules that would cause a related record to be displayed in the field listing. However, for example, a project may be related to multiple cases. This means that the cases will be displayed in a subpanel beneath the fields listing.

Users with administrator or developer access have the ability to change the fields (e.g. Name, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the [Studio](#) documentation in the Administration guide.

Related record subpanels allow the following operations to be performed. Please note that administrators in Sugar can change the subpanel's Action menu to be displayed as separate buttons instead of a dropdown via Admin > System Settings. For more information, please refer to the [System](#) documentation in the Administration guide.

- To view the details of a related record, click the record's name in the subpanel to open it in detail view.
- To relate an existing record to the project, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To edit the project's related record, choose "Edit" on the far right of the record's row.
- To delete the project's relationship to a record, choose "Unlink" from the dropdown on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

Editing Projects

Projects may be edited at any time to update or add information to the record. You can make changes to existing project records via the Projects edit view and quick

create forms. Edit view is available within the Projects module and includes all of the Project fields you should need. To edit the Project Tasks related to this project, please refer to the [Editing Project Tasks](#) section of this documentation

Create new plan for the annual audit » Edit

Quick create is available for editing projects from outside the Projects module and opens as a pop-up without navigating away from your current page. It generally contains fewer fields, but the Full Form button may be used to access the full edit view should you need to edit additional fields.

Please note that your ability to edit projects in Sugar may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure both the Projects edit view and quick create via Admin > Studio. For more information on configuring layouts, please

refer to the [Studio](#) documentation in the Administration guide.

Editing Via Detail View

You can edit projects via the [detail view](#) by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve your changes.

Editing Via List View

You can edit projects via the [list view](#) by clicking the Pencil icon to the left of each project's name. A pop-up window will open with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve your changes.

Editing Via Reports

Sugar reports also allow you to edit a project by clicking on the pencil icon next to a project's name. This opens a pop-up window with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes.

Please note that you may only directly edit projects from Rows and Columns-type or Summation with Details-type reports as Summation-type and Matrix-type reports do not include the pencil icon. For more information on reports, please refer to the Reports documentation.

Deleting Projects

If a project record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Projects detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting projects will not delete related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records if necessary.

Please note that your ability to delete projects may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

Deleting Via Detail View

Use the following steps to delete a project via the detail view:

1. Navigate to a project's detail view.
2. Select "Delete" from the Actions menu.

Create new plan for the annual audit

3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Mass Deleting Via List View

Use the following steps to delete one or more projects via the list view:

1. Navigate to the Projects list view by clicking the Projects module tab.
2. Use the [Basic](#) or [Advanced Search](#) to find the project records you wish to delete.
3. Select the desired project records individually or using the [Checkbox Dropdown's](#) options.
4. Choose "Delete" from the Actions menu.

5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Due to PHP memory limitations on the server, there may be occasions when the application times out while deleting a large number of project records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Exporting Projects

Sugar's Export option allows users to download all fields for the selected projects to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Project data with other software such as Microsoft Excel. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of project records. If you

encounter an error when performing this action, we recommend selecting the records in smaller batches.

Projects may be exported from the Projects list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for projects and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation.

Please note that your ability to export projects from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

Exporting to Microsoft Project

Sugar includes the functionality to export projects not just in CSV format, but also in .MPX format. MPX is the standard format used by Microsoft Project. Upon exporting this file, you will be able to open the file in Microsoft Project, which allows people who are not Sugar users to be able to view this project information.

The following steps cover exporting a project to Microsoft Project:

1. Navigate to a project's detail view
2. Select "Export to MS Project" from the Actions menu

3. Open the downloaded file in Microsoft Project

Mass Updating Projects

Mass Updating allows users to make the same change to multiple projects at once from the Projects list view. Users with administrator or developer access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio documentation in the Administration guide. Due to the PHP memory limitations on the server, there may be occasions when the application times out while mass updating a large number of project records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Please note that your ability to mass update projects may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

Use the following steps to mass update projects from the list view:

1. Navigate to the Projects list view by clicking the Projects module tab.
2. Use the list view's Basic or Advanced Search to find projects you wish to modify.
3. Select the desired project individually or using the Checkbox Dropdown's options.
4. Choose "Mass Update" from the Actions menu.

5. Scroll to the Mass Update panel and set values for the fields you wish to alter. Note: For the Teams field, use "Replace" to remove existing team assignments before adding those specified here. Use "Add" to add the teams specified here to any existing team assignments.

6. Click "Update" to save the changes to all of the currently selected project.

Project Templates

Project Templates are used when a similar project is used multiple times. Project Templates will save you from recreating the project each time. Instead, the template can be used to create a new project which will have the same information from the detail view and the same [Project Tasks](#). Templates can be reused as often as need be. They can be created using two different ways:

- The module tab's Action Menu

- Replicating an existing project using the Detail View's Action Menu

Choosing this option will bring you to a screen to define a new name for the

template so that it can be made unique before saving the template and being mixed with others.

When creating a project from a Project Template, the Project Tasks carry over from the template to the new project. In addition, all of the fields within the module carry over.

To see a list of all project templates, navigate to the Project Templates list view. To access the list view, simply hover over the Projects module tab and select "View Project Templates".

While list view shows key project template fields, you can click the project template's name to open the record in detail view. For more information on the Project Template's list view, please review the Projects List View section of this documentation.

To create a project from a template, please review the Creating Via Project Template section of this documentation.

Project Resources

Project Resources are a list of users and contacts that can be assigned Project Tasks. On a project where you are the assigned user, you will see a subpanel on the Projects detail view called "Resources". The subpanel will provide options to Select User, Select Contact, or unlink an existing relationship. In addition any related user or contact resource will have a corresponding icon allowing you to view the user's detail view or contact's detail view.

When a resource has been added to the project, the resource will show on the Gantt chart as an available option for Project Tasks to be assigned. For more information on the Gantt chart, please review the [Project Tasks Gantt Chart](#) section of this documentation.

Note: If you are not able to view project resources, the administrator may have disabled the Projects subpanel for your entire Sugar instance. Reach out to your Sugar administrator to have the subpanel displayed. For more information on displaying and hiding subpanels throughout Sugar, please refer to the [Developer Tools](#) documentation in the Administration guide.

Project Resource Reports

From the Gantt chart, a resource report can be created showing a specific user's or contact's assigned tasks across all projects and the user or contact's workload for a given timeframe.

The report is filtered by each resource and filters for tasks starting or finishing after a date, and before another given date. This allows an overall view of the resource's time relative to all projects, not just one specific project.

This report shows the following information:

- Daily Report : This section shows a daily breakdown of all weekday dates for the report for the resource. The section also shows a "% Busy" section showing what percentage of an 8 hour day is being taken up for this resource by project tasks. If the resource has a Project Holiday scheduled, the % Busy will show as "Holiday".

Daily Report

Date	% Busy
04/01/2013	0
04/02/2013	100
04/03/2013	100
04/04/2013	Holiday
04/05/2013	Holiday

- Project Tasks : This section shows a list of all project tasks associated with the resource in the given timeframe. This includes tasks across all projects, not just the project from which the report was generated. This shows details for each task so that you can see each task assigned to the user, as well as the project that the task is for.

Project Tasks

ID	Project	Task Name	% Complete	Duration	Start	Finish
1	Create new plan for the annual audit	Communicate with internal stakeholders	100	3 Days	04/02/2013	04/04/2013

- Holidays : This section shows a list of all of the resource's project holidays for the given timeframe. This will show all holidays, regardless of which project they are associated.

Holidays

Date	Project
04/04/2013	Audit Preparation
04/05/2013	Create new plan for the annual audit

Project Holidays

The Project Holidays subpanel allows you to list any days that a user or contact resource will not be working on a given project. This links with the project tasks to ensure that timing of tasks is not affected by a resource taking a holiday. The holidays are marked for specific days for specific project resources. Project Holidays contain three fields:

Field	Description
Description	A brief description or reason for the holiday.
Holiday Date	The holiday or vacation date for this resource on the project.
Resource Name	The user or contact taking the holiday, selected from a dependent dropdown list.

Holidays created from this subpanel are specific to the project. Holiday records can be deleted and removed from the project by clicking "Unlink" on the corresponding line on the subpanel.

Project Tasks

Project Tasks are a list of each task that needs to be performed to complete the project. Project Tasks is a separate module than the Projects module, but it can only be accessed via Projects. Each task can be tracked and monitored via the Gantt chart. Each task can also be assigned a specific resource and is given a planned start and finish date allowing the timing to be tracked and planned.

Project Task Fields

The Project Tasks module contains the following fields, which enable users to properly organize and track each task.

Field	Description
% Complete	A numerical value to indicate what percentage of the task has been completed.
Actual Duration	After the task is completed, enter a numerical value for the actual duration of the task.
Description	Found only in the edit and detail views, enter a brief description of the task and any necessary details.
Duration	Only editable from the Gantt chart, enter a numerical value to indicate how long it would take to complete the task which can be specified in days or in hours. Note: Changes to this field will affect the Finish Date as well.
Estimated Effort (hrs)	Found only in the edit and detail views, enter a numerical value for the estimated amount of work needed for

	this task.
Finish Date	Only editable from the Gantt chart, this field will populate based on the Start Date and Duration. Clicking on this field on the Gantt chart will produce a calendar popup to easily select a date. Note: Changes to this field will affect the Duration as well, and will be affected by changes to the Start Date and/or Duration fields.
Milestone	Mark tasks as milestones if they are an important and measureable landmark on the way to completing the project. Tasks can be marked with a checkbox on the edit view or by clicking the task ID to highlight the entire row and then right clicking in the Gantt chart. Milestone tasks will include an asterisk next to the task ID on the Gantt chart.
Order	The project task's detail view and edit view display an Order field. This field, which was used in the application prior to version 5.0, has been replaced by the Task ID field. If you are not using an order number, you can safely remove this field from the Project Task layouts in Studio.
Predecessors	If the completion of this task depends on the completion of other tasks, enter the Task ID in this column. This field must be edited and viewed from the Gantt chart. Note: Multiple tasks can be predecessors and the IDs can be separated by commas.
Priority	Choose a value of Low, Medium, or High for the task which can be edited and viewed from the edit and detail views.
Project	The name of the parent project that can be viewed from both the edit and detail views. This value cannot be edited.

Resource	Select the individual who is assigned to the task from the Resources dropdown list.
Start Date	Only editable from the Gantt chart, this field will automatically populate with today's date. Clicking on this field on the Gantt chart will produce a calendar popup to easily select a date.
Status	Found only in the edit and detail view, choose a value representing the current stage of the task. This field also shows on the [Project Tasks subpanel]().
Task ID	When viewing the Gantt chart, the tasks are ordered by Task ID. Task IDs cannot be directly edited from the Gantt chart or the edit and detail views. To move a task to a different section of the list, and therefore change its Task ID, click on the existing ID to highlight the row, then right click to "Cut" and then "Paste" it in the new location.
Task Name	Enter the name for the project task here.
Task Number	The project task's detail view and edit view display a Task Number field. This field, which was used in the application prior to 5.0, has been replaced by the Task ID field. If you are not using task number, you can safely remove this field from the Project Task layouts in Studio.
Teams	The Sugar team(s) assigned to the task. This is only viewable from the edit and detail view.
Utilization (%)	From the dropdown list, select the percentage of a day that the resource should dedicate their work hours towards the assigned task. This field is only found in the edit and detail views of the project task. Note: The value of this field is not reflected in the Resource Report.

Project Tasks Module Tab

The Project Tasks module tab is located on the navigation bar at the top of the Project Task detail view, Project Task edit view, or Project Task list view. Click the tab to access the Project Task list view. You may also hover on the tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of project tasks you last viewed in the module.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Project	Opens the edit view layout to create a new project
Project List	Opens the list view layout to search and display projects
Project Tasks	Opens the list view layout to search and display project tasks

Creating Project Tasks

Project Tasks can only be created from the Gantt chart's project grid. The tasks are specific to each project, so they must be created directly from the project. When creating a Project Task from the grid, you will be able to put in basic information about the task. To add additional information later, please review the Editing Project Tasks section of this documentation.

Use the following steps to create a project task via the Projects module:

1. Navigate to the detail view of the project where you would like to add tasks.
2. From the detail view, select "View Gantt" from the Project Tasks subpanel:

Or select "View Gantt" from the Actions Menu:

3. Add a row to the grid next to the Gantt chart. This can be done using the icon in the toolbar or by right clicking on the grid.

4. Fill in the grid columns on the new row that you created. When complete, click the save icon the toolbar.

Viewing Project Tasks

There are various options available for viewing project tasks in Sugar including via the grid and Gantt chart, the My Projects Dashboard, Project Tasks list view, Project Tasks detail view, Project Tasks Recently Viewed menu, dashlets, and reports.

Viewing Project Tasks Via Gantt Chart

The Projects module includes a grid and Gantt chart, which allows you to view all project tasks related to a specific project in one place. The grid, on the left of the screen, outlines each task with pertinent information regarding each project task. The Gantt chart, on the right, shows a timeline of each task and how they overlap. For more information on the Gantt chart, please review the Project Tasks Gantt Chart section of this documentation.

Create new plan for the annual audit

View Gantt

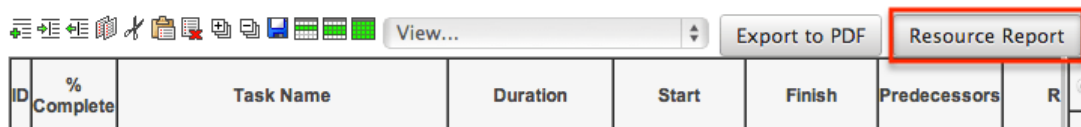| ID	% Complete	Task Name	Duration			Start	Finish	Predecessors	Res	04/16/2013						
										T	W	T	F	S	S	M
1	100	Communicate with internal stakeholders	2	Days	⬍	04/15/2013	04/16/2013		Joseph							
2	38	Create draft of the plan	7	Days	⬍	04/17/2013	04/25/2013	1	Joseph							
3	75	Perform field studies to collect data	18	Days	⬍	04/18/2013	05/13/2013		Will We							
4	0	Update draft of the plan	6	Days	⬍	04/26/2013	05/03/2013	2	Admini							
5	50	Gather data from meetings	2	Days	⬍	05/14/2013	05/15/2013	3	Joseph							

Viewing Project Tasks Via My Projects Dashboard

The Project Dashboard allows for users to view any upcoming or overdue project tasks that are assigned to the user, or are related to any projects for which the user is the assigned user. The Project Dashboard can be reached by clicking the appropriate link in the Projects module tab.

The "My Projects Dashboard" panel shows four columns, showing projects that are assigned to you, any overdue project tasks where the Finish Date is in the past, any upcoming project tasks where the Start Date is within the next week, and any cases that are open related to the project.

The "My Project Tasks" panel shows two columns, showing any overdue project tasks assigned to you where the Start Date is in the past, any upcoming project tasks assigned to you where the Finish Date is within the next week.

Any project task link is clickable and will take you to the grid and Gantt chart for the given project. Next to the task name, Sugar also displays the Finish Date for the task.

My Projects Dashboard

Project	Overdue Tasks	
Audit Preparation 01/25/2014	Perform field studies to collect data	03/28/2013
	Create draft of the plan	04/01/2013
	Gather data from meetings	04/04/2013

Viewing Project Tasks Via List View

The Project Tasks list view displays all project records meeting the current search criteria. To access the list view, click the "View Project Tasks" option from the Projects module tab. While list view shows key project fields, you can click the project task's name to open the record in detail view. For more information on viewing project via list view, please refer to the [Project Tasks List View](#) section.

Viewing Project Tasks Via Detail View

The Project Tasks detail view displays thorough project task information including all project task fields followed by subpanels of the project task's related records belonging to various modules. The detail view can be reached by clicking a project task record's link from anywhere in the application including from the Projects detail view. For more information on viewing project tasks via detail view, please refer to the [Project Tasks Detail View](#) section.

Viewing Project Tasks Via Recently Viewed

As you work, Sugar will keep track of which project tasks you have recently viewed. Hover on the [Project Tasks module tab](#) to see a list of your most recently viewed project tasks and click each name to open the project task in detail view.

Viewing Project Tasks Via Dashlets

The Home page displays a collection of Sugar Dashlets, which allow users to get a quick view of various records, activities, reports, etc. You can view project task information in dashlets such as "My Project Tasks" as well as in dashlets based on other modules such as "My Calls". Clicking a project task's name from any dashlet will open the project in detail view. For more information on using dashlets and viewing project records via dashlets, please refer to the [Modules](#) section of the Home documentation.

Viewing Project Tasks Via Reports

Users with access to the Reports module can build, run, and manage reports to gather key data regarding projects and their related records. In addition to only displaying desired fields and relationships, reports can also incorporate complex filters to only display specific subsets of your records. Once the report is run, you will be able to view the project task record's detail view by clicking the project's name in the report results. Please note that you can only directly access project task detail views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the documentation.

Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you cannot access the Reports module.

Searching Project Tasks

The Project Tasks list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Project Tasks list view below. Global Search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. Please

note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "create" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.
Note: Project Tasks is hidden from Global Search by default. The administrator must enable it for your use.

Project Tasks Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.

The buttons and checkboxes available in Basic Search panel have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Items : Select this box to return only records assigned to you.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Items" and enter a project task name, Sugar will only return project tasks with a matching name that are assigned to you. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all project tasks to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see projects as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide.

Administrators can configure what fields appear on the Project Tasks Basic Search

via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Project Tasks Advanced Search

Advanced Search offers a more in-depth search experience than Basic Search including additional fields, layout options, and saved search capability. From the Advanced search panel, you can click "Basic Search" for simplified searching.

The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the Layout Options section of the Search documentation.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section of the Search documentation.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select a Project Name and enter in a project task name to search, Sugar will only return project tasks with a matching name that related to that specific project. When searching by a multiselect or dropdown field (e.g. "Assigned to"), however, Sugar will return records matching any of these selections. Once the search completes, the relevant results will populate in the list view below the search panel. To see all project tasks to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see project tasks as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide.

Administrators can configure what fields appear on the Projects Advanced Search via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Project Tasks List View

The Project Tasks list view displays all project tasks meeting the current search criteria and to which your user has access. You can view the basic details of each project task within the field columns. Please note that you will only be able to see project tasks as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Teams](#) and [Roles](#) documentation in the Administration guide.

You have the option to change what fields are displayed in list view by configuring your layout options in the Project Tasks Advanced Search. For more information on configuring your list view, please refer to the [Layout Options](#) section of the Search documentation. Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Project Tasks Pagination

List view displays the current search results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. To the right just below the search panel you can see which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of your current results.

By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.

Project Tasks Checkbox Selection

You can perform several actions on project task records directly from the list view

by first selecting the desired records. To select individual project tasks on the Project Tasks list view, mark the checkbox on the left of each row. To select or deselect multiple project tasks on the list view, use the options in the checkbox dropdown menu:

- Select This Page : Selects all records shown on the current page of project results.
- Select All : Selects all records in the current search results across all pages of project results.
- Deselect All : Deselects all records that are currently selected.

Project Tasks Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.

The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Delete	Delete one or more project tasks at a time
Mass Update	Mass update one or more project tasks at a time
Export	Export one or more project tasks to a CSV file

Project Tasks More Information

Additional details for each project task can be viewed by clicking the "i" icon to the far right of each list view row. This provides users a quick view of additional project task information in addition to what appears in the display column fields. The resulting pop-up window will show the Description field by default. The list of fields appearing here may only be configured through a code-level customization.

Project Tasks Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time. You can also set a default order-by column using the layout options in Advanced Search. For more information on setting a default column sort, please refer to the Layout Options section of the Search documentation.

Project Tasks Detail View

The Project Tasks detail view displays thorough project task information including all project task fields which are grouped by default into one panel. You can also view a project task's related records (Activities, History, etc.), which appear in subpanels beneath the project task fields. The detail view can be reached by clicking a project task's link from within Sugar including from the Project Tasks list view.

Please note that you will only be able to view a project task record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Project Tasks Actions Menu

The Actions menu on the top left of each project's detail view allows you to perform two actions on the current record. Administrator users can change the

action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the [System](#) documentation in the Administration guide.

Gather data from meetings

Edit ▾
Edit Task In Grid
Name: Gather data from meetings
Start Date: 05/15/2013

The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Edit	Edit this project task
Edit Task In Grid	View the project task's parent project's Grid and Gantt chart

Next or Previous Project Task Record

On the upper right of the Project task's detail view, there are two buttons that allow you to page through each project in the Project Task list view's current search results. Clicking the Previous button displays the previous project task of the current search results while clicking the Next button displays the next project task of the current search results. The text in between shows which project task result you are currently viewing within the total number of current results.

Gather data from meetings

Edit ▾   ⓐ (1 of 5) ⓑ

Name: Gather data from meetings   Task ID: 5

Project Tasks Subpanels

Beneath a project task's fields are subpanels containing containing related records from various modules, including different activities such as calls and meetings, as well as a history of notes and emails.
Please note that administrators can prevent users from moving subpanels to different locations in the detail view. For more information on preventing rearranging of subpanels, please refer to the [System](#) documentation in the

Administration guide. Check with your system administrator if you are not able to rearrange your subpanels.

Project Tasks Related Record Subpanels

Subpanels can be added to the Project Tasks module using relationships between other modules and Project Tasks. Subpanels appear at the bottom of the detail view. By default, Sugar does not include and any subpanels relating Project Tasks to other modules. To add subpanels via relationships, please refer to the Studio documentation in the Administration guide.

The most common type of subpanels displayed on a project task's detail view contain the project task's related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. For example, a project task may be related to only one account but related to multiple contacts. This means that the related account will be displayed amongst the project task's fields while contacts will be displayed in a subpanel beneath the fields.

Users with administrator or developer access have the ability to change the fields (e.g. Name, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.

Related record subpanels allow the following operations to be performed. Please note that administrators in Sugar can change the subpanel's Action menu to be displayed as separate buttons instead of a dropdown via Admin > System Settings. For more information, please refer to the System documentation in the Administration guide.

- To view the details of a related record, click the record's name in the subpanel to open it in detail view.
- To relate an existing record to the project, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the project, choose "Create" from the subpanel's Action menu, then complete the quick create form and click "Save".
- To edit the project task's related record, choose "Edit" on the far right of the record's row.
- To delete the project task's relationship to a record, choose "Remove" from the dropdown on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.

- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

Please note that administrators can prevent users from moving subpanels to different locations in the detail view. For more information on preventing rearranging of subpanels, please refer to the [System](#) documentation in the Administration guide. Check with your system administrator if you are not able to rearrange your subpanels.

Project Tasks Activities and History Subpanels

The Activities subpanel lists open or upcoming tasks, calls, and meetings that are related to the project task record. Once the activities have taken place or are completed, they will instead appear within the History subpanel. The History subpanel also includes notes and emails associated with the project task record. For more information on the history and activities subpanel, please refer to the [User Interface](#) documentation.

Project Tasks Gantt Chart

The Projects module includes a grid and Gantt chart to allow you to visualize, track, and easily make changes to your project tasks all in one place. This menu is accessible from each project's detail view through the [Actions Menu](#) or the [Project Tasks](#) subpanel. The page consists of a grid which shows each project task, as well as information on the timing, % complete, preceding tasks, and who is

responsible for completing the task. Project tasks on the grid can be edited by clicking on the specific cell and making in-line changes. Whole rows can be selected by clicking the Task ID number in the ID column on the far left column. The Gantt chart shows a timeline of each task represents which tasks are being worked on at a given time.

Create new plan for the annual audit

View Gantt

ID	% Complete	Task Name	Duration			Start	Finish	Predecessors	Res	04/16/2013						
										T	W	T	F	S	S	M
1	100	Communicate with internal stakeholders	2	Days	↕	04/15/2013	04/16/2013		Joseph							
2	38	Create draft of the plan	7	Days	↕	04/17/2013	04/25/2013	1	Joseph							
3	75	Perform field studies to collect data	18	Days	↕	04/18/2013	05/13/2013		Will We							
4	0	Update draft of the plan	6	Days	↕	04/26/2013	05/03/2013	2	Admini							
5	50	Gather data from meetings	2	Days	↕	05/14/2013	05/15/2013	3	Joseph							

Gantt Chart Toolbar

The Gantt Chart Toolbar allows you to make changes to both what tasks are showing on the grid, but also how they are displayed. The icons and menus perform the following actions, from left to right:

Toolbar Option	Description
Add New Row	Adds a new row to the end of the task list, unless a row is selected, when the button will add the row above the selection
Indent Row	When a row is selcted, this button will make it a subordinate function of the above row, causing any subordinate tasks to be grouped under the parent task
Outdent Row	When a row is selcted and already indented, this button will move it out from being a subordinate function of the above row and making it its own task
Copy Row	When a row is selected, the Copy button will allow the data in the row to be placed in another row while keeping the origional in tact
Cut Row	When a row is selected, the Cut button will delete the entire row, but allow it to be pasted into another as an ensuing action

Paste Row	Adds currently copied or cut row to the end of the task list, unless a row is selected, when the button will place the row above the selection
Delete Row	When a row is selected, the Delete button will remove the entire row and delete the project task
Expand All	This button will affect the entire grid by expanding all hidden rows created by indenting to show all rows on the grid
Collapse All	This button will affect the entire grid by collapsing all visible indented rows on the grid
Save	Saves all changes to the grid and updates the related project task records
Week View	Changes the Gantt chart to show one week of events at a time
2 Week View	Changes the Gantt chart to show two weeks of events at a time
Month View	Changes the Gantt chart to show one month of events at a time
View...	Dropdown list to provide filters to change which project tasks are showing on the grid
Export to PDF	Exports a PDF from Sugar containing the information shown in the task grid
Resource Report	Opens the Resource Report popup
Grid	Changes the view of the page to only show the task grid and releted toolbar buttons
Gantt	Changes the view of the page to only show the Gantt chart and releted toolbar buttons
Grid/Gantt	Changes the view of the page to show both the task grid and Gantt chart

Editing Project Tasks

Project Tasks may be edited at any time to update or add information to the record. You can make changes to existing project task records via the Gantt chart,

Project Tasks edit view, and Project Task quick create forms. Edit view is available within the Project Tasks module and includes all of the Project Task fields you should need.

Quick create is available for editing project tasks from outside the Project Tasks module and opens as a pop-up without navigating away from your current page. Unlike other Sugar modules, the quick create view of the Project Tasks module will be exactly the same as the edit view. A full form option is available if you do not want to view this layout as a popup.

Please note that your ability to edit project tasks in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure the Projects edit view via Admin > Studio. For more information on configuring layouts, please refer to the Studio

documentation in the Administration guide.

Editing Project Tasks Via Detail View

You can edit project tasks via the [Detail View](#) by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve your changes.

Gather data from meetings

Edit ▼

| Name: | Gather data from meetings |
| Start Date: | 05/15/2013 |

Editing Project Tasks Via Gantt Chart

Project Tasks can be edited one at a time via the task grid and Gantt Chart. The Gantt chart can be accessed via the [Projects detail view](#) and [Project Tasks detail view](#). Project Task fields can be edited by clicking on the field, either if it is empty or if it contains existing data, and edits can be made directly inline on the grid. Selecting the entire row can be done by clicking the ID number for the row of each project task. Multiple tasks can be selected by holding the Shift key on your keyboard while clicking.

The following [fields](#) can be edited from the task grid and Gantt chart:

- % Complete
- Task Name
- Duration
- Start
- Finish
- Predecessors
- Resource
- Actual Duration

Editing Project Tasks Via List View

You can edit project tasks via the list view by clicking the Pencil icon to the left of each project task's name. A pop-up window will open with the quick create form which is a popup version of the edit view layout. Update the necessary fields, then click "Save" to preserve your changes.

Editing Project Tasks Via Dashlets

You can edit project tasks by clicking the pencil icon to the far right of any Project Task-based dashlet on your Sugar home page. For example, clicking the pencil icon within the My Project Tasks dashlet will open a pop-up window with the quick create form containing the edit view layout. Update the necessary fields, then click "Save" to preserve the changes. For more information on dashlets, please refer to the [Home](#) documentation.

Editing Project Tasks Via Reports

Sugar reports also allow you to edit a project task by clicking on the pencil icon next to a task's name. This opens a pop-up window with the quick create form which is a pop-up version of the edit view layout. Update the necessary fields, then click "Save" to preserve the changes.

Please note that you may only directly edit project tasks from Rows and Columns-type or Summation with Details-type reports as Summation-type and Matrix-type reports do not include the pencil icon. For more information on reports, please refer to the [Reports](#) documentation.

Deleting Project Tasks

If a project task is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the project's Gantt chart or the Project Tasks list view. Deleting via the Gantt chart allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting projects will not delete related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records if necessary.

Please note that your ability to delete project tasks may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

Deleting Project Tasks Via Gantt Chart

Use the following steps to delete a project task via the Gantt chart:

1. Navigate to the project's Gantt chart
2. Select the project task's row by clicking on the ID number for the task

3. Right click on the selected row and select the "Delete" option from the action menu, or click the "Delete" button from the Gantt toolbar

4. Save the Gantt chart to confirm the change to the project.

Mass Deleting Project Tasks Via List View

Use the following steps to delete one or more project tasks via the list view:

1. Navigate to the Project Tasks list view by hovering over the Projects module tab and selecting "View Project Tasks".
2. Use the Basic or Advanced Search to find the project task records you wish to delete.
3. Select the desired project tasks individually or using the checkbox dropdown's options.
4. Choose "Delete" from the Actions menu.

5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Due to PHP memory limitations on the server, there may be occasions when the application times out while deleting a large number of project task records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Exporting Project Tasks

Sugar's Export option allows users to download all fields for the selected project tasks to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Project data with other software such as Microsoft Excel. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of project tasks. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Project tasks may be exported from the Project Tasks list view by selecting "Export" from the Actions menu. Users with access to the Reports module also have the option of creating or accessing reports containing specifically chosen fields for project tasks and their related record(s). Please note that only Rows and Columns-type reports have the ability to be exported. For more information on

exporting records in Sugar, please refer to the [Export](#) documentation.

Please note that your ability to export projects from Sugar may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

Mass Updating Project Tasks

Mass Updating allows users to make the same change to multiple project tasks at once from the Project Tasks list view. Users with administrator or developer access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the [Studio](#) documentation in the Administration guide. Due to the PHP memory limitations on the server, there may be occasions when the application times out while mass updating a large number of project tasks. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Please note that your ability to mass update project tasks may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

Use the following steps to mass update projects from the list view:

1. Navigate to the Project Tasks list view by hovering over the Projects module tab and selecting "View Project Tasks".
2. Use the list view's [Basic](#) or [Advanced Search](#) to find project tasks you wish to modify.
3. Select the desired project tasks individually or using the [checkbox dropdown's](#) options.
4. Choose "Mass Update" from the Actions menu.

5. Scroll to the Mass Update panel and set values for the fields you wish to alter. Note: For the Teams field, use "Replace" to remove existing team assignments before adding those specified here. Use "Add" to add the teams specified here to any existing team assignments.

6. Click "Update" to save the changes to all of the currently selected project tasks.

Last Modified: 09/26/2015 06:25pm

Reports

Overview

Sugar's Reports module allows users to build, generate, and manage reports for modules such as Accounts, Contacts, Calls, etc. Reporting is a valuable tool in Sugar as users can gather key data from various modules to generate vital information for their organization. There are four types of reports (Rows and Columns Report, Summation Report with Details, Summation Report, Matrix Report) available in Sugar. This documentation cover how to use the Reports module to build, generate, and manage reports as well as the various actions and options available from within the module.

Reports Module Tab

The Reports module tab is located on the navigation bar at the top of any Sugar screen. Click the tab to access the Reports list view. You may also hover over the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of reports you last viewed in the module. The Favorites menu displays the list of reports you most recently marked as favorites in the module.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Report	Opens the report wizard to create a new report
View Reports	Opens the list view layout to search and display reports
Manage Advanced Reports	Opens the Advanced Reports tab to create and view advanced reports

Report Types

There are four types of reports (Rows and Columns Report, Summation Report, Summation Report with Details, Matrix Report) available for users to create in Sugar. Please note that each report type provides users with key information for records that meet the specified criteria, but each displays the report results in different layouts.

Rows and Columns

The Rows and Columns report is the most basic report to create out of the four report types. The report results display the data in a simple rows-and-columns format displaying values for the selected display column fields for all records meeting the specified criteria. Please note that only Rows and Columns-type reports can be exported as a .CSV (comma-separated values) file in Sugar. For more information on creating a Rows and Columns report, please refer to the

[Rows and Columns Report](#) section of this documentation.

Summation

The Summation Report provides computed data based on the selected fields for records meeting the specified criteria. You can group the report based on one or more fields from the target or related module. The report result will display the data in groups, summarized using computed derivatives (e.g. SUM, AVG, MAX, MIN) from numeric-type field values (e.g. opportunity amount, amount, etc.) as well as weighted amounts. Summation Reports can be viewed in a chart format and displayed as a Sugar Dashlet on your Home page as well.For more information on creating a Summation Report, please refer to the [Summation Report](#) section of this documentation.

Summation Report with Details

The Summation Report with Details is a combination of the Summation-type and Rows and Columns-type report as you can group the data, get the total count of records, and choose display columns (e.g. Contacts Name, Account Name, Email Address, etc.) as well. You can group the report based on one or more fields from the target or related module. You can view a Summation Report with Details in a chart format and displayed as a Sugar Dashlet on your Home page. For more information on creating a Summation Report with Details, please refer to the [Summation Report with Details](#) section of this documentation.

Matrix

The Matrix Report is also similar to the Summation-type report as it provides an overview of the computed data and displays the total summary count. The report results are displayed in a grid table with row and column headers. The numeric field values for all display summaries will appear on the table along with the grand total amounts for each row and column. Matrix Reports can be viewed in a chart format and displayed as a Sugar Dashlet on your Home page. For more information on creating a Matrix Report, please refer to the [Matrix Report](#) section of this documentation.

Creating Reports

There are various types of reports (e.g. Rows and Columns Report, Summation Report with Details, Summation Report, Matrix Report) you can create via the Reports module. When you select "Create Report" from the Actions menu of the

Reports module tab, the first step of the Report Wizard is to select the report type. The report type you select determines the steps you will have to complete to create the report. The following sections cover creating the four different report types via the Reports module.

Rows and Columns Report

Out of the four report types, the Rows and Columns report is the most basic one to create in Sugar. Users can simply define filters to determine which records the report will include or exclude and then choose the fields (e.g. Name, Email Address, etc.) they would like displayed in the report result. The Rows and Columns report creates a tabular report containing the values of selected display column fields for all records meeting the specified criteria. Please note that only Rows and Columns-type reports have the ability to be exported to a CSV file in Sugar.

The following steps cover creating a Rows and Columns report for calls with a status of held as an example:

1. Navigate to the Reports module and select "Create Report".

2. Choose "Rows and Columns Report" as the report type and "Calls" as the target module in the following step.

3. To filter on a field related to the target module, select it from the Available Fields list on the bottom left, and it will be added to the list of filters. We will select "Status" to filter the report based on call records already held. Click "Next".
    - For more information on report filters, please refer to the [Report Filters](#) section of this documentation.

4. On the Choose Display Columns step, select the fields you would like included on the report result from the Available Fields list and then click "Next". The following fields will be added to the report: Subject, Status, Description, Date Created, User Name, Contacts Name, and Account Name.
   ○ For more information on selecting display column fields, please refer to the [Report Display Columns](#) section of this documentation.
5. Select "Subject", "Date Created", "Status", and "Description" in the Available Fields > Calls list, as these are direct fields of the Calls module. By default, the target module fields are displayed in the Available Fields list.
   ○ Note: You can designate the generated report to be sorted by a specific display column field in either ascending or descending order. Simply mark the radio button next to the field label then select "Ascending" or "Descending" in the corresponding dropdown list.

6. For the User Name field, click "Assigned to User" from the Related Modules list at the top left then select "User Name" from the Available Fields : Assigned to User list.
    ○ Note: User names are stored in their own table in the database and are related to the modules in Sugar. So even though the assigned user field appears in various module layouts, they are not direct fields of those modules.

7. For the Contacts Name field, click "Contacts" from the Related Modules list then select "Name" from the Available Fields : Contacts list.
    ○ By default, the label for the Name field will display "Name", but you can override the label to "Contacts Name" to differentiate the field between accounts and contacts. For more information on changing display column labels, please refer to the Changing Display Column Labels section of

this documentation.

8. For the Account Name field, click "Account" from the Related Modules list then select "Name" from the Available Fields : Account list.
   ○ Change the label for the Name field to display "Account Name". For more information on changing display column labels, please refer to the
9. To place the fields in a different order on the report, drag and drop the field rows within the display column list.
   ○ The first field (Subject) on the display columns list represents the first column of the report, the second field (Date Created) is the second column, and so forth. For more information on changing the display column order, please refer to the Changing Display Column Order section of this documentation.
10. Click "Next" once all appropriate fields have been added.
11. On the Report Details step, enter the report name and assign it to the appropriate user and team.
   ○ Please note that if you want your report to include all held calls whether or not they have an assigned user, related contact, or account, you will need to mark the Optional Related Modules boxes. For more information on marking related modules as optional, please refer to the Optional Related Modules section of this documentation.

12. Once the report details are entered, click "Save and Run" to save and generate the report immediately.
   ○ Clicking the Preview button allows you to preview the report prior to saving.
   ○ Clicking the Save button will save the report, but not run it immediately.

Name: Calls with Held Status
Modules: Calls, Calls > Assigned to User, Calls > Contacts, Calls > Account
Display Columns: Subject, Date Created, Status, Description, User Name, Contacts Name, Account Name
Schedule: None
Filters: ⩗

Type: Rows and Columns Report
Teams: Global
Assigned to: Max Jensen

(1 - 4 of 4)

Subject ⇕	Date Created ⇕	Status ⇕	Description	User Name ⇕	Contacts Name ⇕	Account Name ⇕
Follow up call	02/28/2013 03:20pm	Held	Call with Sheena regarding new account.	max	Sheena Rathbone	
Contract Renewal	03/04/2013 11:21am	Held	Call with Waverly Trading House regarding contract renewal.	max		Waverly Trading House

Summation Report

The Summation Report allows data to be grouped and provides computed data for records that meet the specified criteria. You can choose an unlimited number of group-by columns to group the data in the report and can define group-by data for related modules as well.You can also drag and drop the group by fields to a different order in the Define Group By step to change the layout in the report results. Please note that the Summation Report does not provide detailed information like Summation Report with Details and will not include display columns in the report.

The following steps cover creating a Summation Report for total closed won opportunities in 2012 by user as an example:

1. Navigate to the Reports module and select "Create Report".
2. Choose "Summation Report" as the report type and "Opportunities" as the target module in the following step.

Click an icon to select a Report Type.

Rows and Columns Report

Create a tabular report that contains the values of selected display fields for records matching the specified criteria.

Summation Report with Details

Create a summation report that displays additional data related to the records in the results.

Summation Report

Create a tabular report that provides computed data for records matching the specified criteria. The data can also be represented within a chart.

Matrix Report

Create a summation report that displays results in a grid format and grouped by a maximum of three fields.

3. To filter on a field related to the target module (Opportunities), select it from the Available Fields list on the bottom left and it will be added to the list of filters. We will select "Expected Close Date" and "Sales Stage" to filter the report based on closed won opportunities for 2012. Click "Next".
   - For more information on report filters, please refer to the Report Filters section of this documentation.

4. On the Define Group By step, select the field(s) you would like the records in the report grouped by, then click "Next". We will add "User Name", which will group the closed won opportunity records by assigned user.
   ○ Please note that you will have to click the related Assigned to User module to select the User Name field as user names are not direct fields of the Opportunities module.
   ○ Note: If you have multiple group-by fields, you can drag and drop the displayed field paths in the Define Group By section to change the ordering and layout in the report result.

5. On the Choose Display Summaries step, select how you would like the opportunity amounts summarized on your report then click "Next". We will select "SUM: Opportunity Amount", which will add all the closed won

opportunity amounts in 2012 per user and display the total for each grouping.
- Please note that the field(s) you selected in the Define Group By step is automatically included in the Choose Display Summaries step.
- Note: You can designate the generated report to be sorted by a specific field column in either ascending or descending order. Simply mark the radio button next to the field label then select "Ascending" or "Descending" in the corresponding dropdown list.

6. On the Chart Options step, select the chart type you want to display in the report as well as how the data will be summarized on the chart, then click "Next". We will select "Vertical Bar" as the chart type, summarized by the total opportunity amount per user.
   - For more information on setting up the chart options, please refer to the
7. On the Report Details step, enter a name for the report and assign it to the appropriate user and team.
   - Please note that if you want your report to include all closed won opportunities whether or not it is assigned to a user, you will need to mark the Optional Related Modules box. For more information on marking related modules as optional, please refer to the Optional Related Modules section of this documentation.

8. Once the report details are entered, click "Save and Run" to save and generate the report immediately.
   - Clicking the Preview button allows you to preview the report prior to

saving.
- ○ Clicking the Save button will save the report, but not run it immediately.

Total is $780K

User Name ⇕	SUM: Opportunity Amount ⇕
chris	$150,000.00
max	$125,000.00

Summation Report with Details

The Summation Report with Details allows data to be grouped and summarized with detailed information related to records in the report. You can group the report based on one or more fields from the target or related module. Grouping the report by particular fields allows the report results to display data in categories by the specified field values. You can also drag and drop the group-by fields to a different order in the Define Group By step to change the layout in the report results.

The following steps cover creating a Summation Report with Details for closed won opportunities in 2012 grouped by month as an example:

1. Navigate to the Reports module and select "Create Report".
2. Choose "Summation Report with Details" as the report type and "Opportunities" as the target module in the following step.

Click an icon to select a Report Type.

Rows and Columns Report

Create a tabular report that contains the values of selected display fields for records matching the specified criteria.

Summation Report with Details

Create a summation report that displays additional data related to the records in the results.

Summation Report

Create a tabular report that provides computed data for records matching the specified criteria. The data can also be represented within a chart.

Matrix Report

Create a summation report that displays results in a grid format and grouped by a maximum of three fields.

3. To filter on a field related to the target module (Opportunities), select it from the Available Fields list on the bottom left, and it will be added to the list of filters. We will select "Expected Close Date" and "Sales Stage" to filter the report based on closed won opportunities for 2012. Click "Next".
   - For more information on report filters, please refer to the Report Filters section of this documentation.

4. On the Define Group By step, select the field(s) you would like the records in the report result grouped by then click "Next". We will add "Month: Expected Close Date", which will group the opportunity records based on the month of the expected close date.
   - Note: If you have multiple group-by fields, you can drag and drop the displayed field paths in the Define Group By section to change the ordering and layout in the report result.

5. On the Choose Display Summaries step, select how you would like the opportunity amounts summarized on your report then click "Next". We will select "SUM: Opportunity Amount", which will add all the closed won opportunity amounts in 2012 and display the total for each grouping.
   ○ Please note that the field(s) you selected in the Define Group By step is automatically included in the Choose Display Summaries step.

6. On the Choose Display Columns step, select the fields you would like included on the report from the Available Fields list on the bottom left then click "Next". The following fields will be included in this report: Opportunity Name, Opportunity Amount, Expected Close Date, Sales Stage, Account Name.
   ○ Refer to Steps 5-10 of creating Rows and Columns Report for instructions on how to add fields as display columns.
   ○ For more information on selecting display column fields, please refer to the Report Display Columns section of this documentation.

7. On the Chart Options step, select the chart type you want displayed in the report as well as how the data will be summarized on the chart then click "Next". We will select "Vertical Bar" as the chart type, summarized by the total opportunity amount per month.
   - For more information on setting up the chart options, please refer to the
8. On the Report Details step, enter a name for the report and assign it to the appropriate user and team.
   - Please note that if you want your report to include all closed won opportunities whether or not they have a related account, you will need to mark the Optional Related Modules box. For more information on marking related modules as optional, please refer to the Optional Related Modules section of this documentation.

9. Once the report details are entered, click "Save and Run" to save and generate the report immediately.
   - Clicking the Preview button allows you to preview the report prior to saving.
   - Clicking the Save button will save the report, but not run it immediately.

Total is $780,000

January 2012	February 2012	March 2012	April 2012	May 2012
June 2012	July 2012	August 2012		
September 2012	October 2012	November 2012	December 2012	

Collapse All

≫ **Month: Expected Close Date = January 2012, SUM: Opportunity Amount = $75,000.00**

Opportunity Name ⇕	Opportunity Amount ⇕	Expected Close Date ⇕	Sales Stage ⇕	Name ⇕
Southern Realty - 1000 units 🖉	$45,000.00	01/12/2012	Closed Won	Southern Realty 🖉

Matrix Report

The Matrix Report provides an overview of the data and displays the total for display summaries in a grid format. The numeric field values for all display summaries will appear on the table along with the grand total amounts for each row and column. You can choose a maximum of three group-by columns to group the data in the report.

You can also choose specific layout options (e.g. 1x2 and 2x1) on the Report Details step of the Report Wizard if you selected three group-by columns on the Define Group By step. The 1x2 layout option displays the data for the first group-by field in a row and displays the data for the other two group-by fields in columns. The 2x1 layout option displays the data for the first two group-by fields in rows and displays the data for the third group-by field in a column. If you only have two group-by columns, you can manually change the report layout by dragging and dropping the group-by fields to a different order on the Define Group By step. Please note that the Matrix Report does not provide detailed information like Summation Report with Details and will not include display columns in the report.

The following steps cover creating a Matrix Report for the number of "closed won" opportunities in 2012 by month for each user as an example:

1. Navigate to the Reports module and select "Create Report".
2. Choose "Matrix Report" as the report type and "Opportunities" as the target module in the following step.

3. To filter on a field related to the target module (Opportunities), select it from the Available Fields list on the bottom left, and it will be added to the list of filters. We will select "Expected Close Date" and "Sales Stage" to filter the report based on closed won opportunities for 2012. Click "Next".
   - For more information on report filters, please refer to the Report Filters section of this documentation.

4. On the Define Group By step, select the field(s) you would like the records in the report result grouped by then click "Next". We will add "User Name" and "Month: Expected Close Date", which will group the opportunity records based on the assigned user and month of expected closed date.
   - Please note that you will have to click the related Assigned to User module to select the User Name field as user names are not direct fields of the Opportunities module. Next, click "Opportunities" in the Related Modules list to select "Month: Expected Close Date".
   - Note: The order of the Group By fields determine which fields constitute the X and Y axis of the displayed report grid. For this example, the assigned users will be listed in rows on the Y axis with the month of expected close date displayed across columns on the X axis of the report

grid. You can change the order of fields by dragging and dropping the
field within the Define Group By section.

5. On the Choose Display Summaries step, select how you would like the
opportunity amounts summarized on your report then click "Next". We will
select "SUM: Amount", which will add all closed won opportunities in 2012
and display the total amount of won opportunities by month by user as well as
the grand total per user and for all users.
    ○ Please note that the field(s) you selected in the Define Group By step is
      automatically included in the Choose Display Summaries step.
    ○ Note: You can designate the generated report to be sorted by a specific
      field column in either ascending or descending order. Simply mark the
      radio button next to the field label then select "Ascending" or
      "Descending" in the corresponding dropdown list.

6. On the Chart Options step, select the chart type you want displayed in the
report as well as how the data will be summarized on the chart then click

"Next". We will select "Pie" as the chart type summarized by the total opportunity amount.

- For more information on setting up the chart options, please refer to the

7. On the Report Details step, enter a name for the report and assign it to the appropriate user and team.
   - Please note that if you want your report to include all closed won opportunities whether or not it is assigned to a user, you will need to mark the Optional Related Modules box. For more information on marking related modules as optional, please refer to the Optional Related Modules section of this documentation.
   - Note: The Layout Options dropdown list (1x2 and 2x1) will appear if you selected three group-by columns on the Define Group By step. Select the appropriate layout depending on how you want the data displayed on the report grid.

8. Once the report details are entered, click "Save and Run" to save and generate the report immediately.
   - Clicking the Preview button allows you to preview the report prior to saving.
   - Clicking the Save button will save the report, but not run it immediately.

Total is $780K

SUM: Amount

User Name	Month: Expected Close Date												Grand Total
	January 2012	February 2012	July 2012	October 2012	March 2012	May 2012	June 2012	September 2012	November 2012	April 2012	August 2012	December 2012	
chris	$45,000.00	$65,000.00											$110,000.00
max			$75,000.00	$50,000.00									$125,000.00
sally	$30,000.00				$50,000.00	$25,000.00	$50,000.00	$70,000.00	$30,000.00				$255,000.00
sarah									$30,000.00	$80,000.00	$45,000.00		$155,000.00
will						$50,000.00						$85,000.00	$135,000.00
Grand Total	$75,000.00	$65,000.00	$75,000.00	$50,000.00	$50,000.00	$75,000.00	$50,000.00	$70,000.00	$60,000.00	$80,000.00	$45,000.00	$85,000.00	$780,000.00

Report Filters

The Define Filters step of the report wizard determines which records the report includes or filters out. Filter groups and operators allow for additional levels of complexity as you combine filters to get the precise result set you desire.

Target Module Filters

By default, the fields for the Target Module you are creating the report on will be displayed in the Available Fields list. To filter on the field related to the target module, select it from the Available Fields list on the bottom left, and it will be added to the list of filters. Please note that only fields marked as "Reportable" in Studio will display in the Available Fields list. For more information on marking fields as reportable, please refer to the Studio documentation in the Administration guide.

You can also use the search feature above the Available Fields list to easily locate a desired field. Simply enter in the appropriate keyword (e.g. billing, date, etc.) in the search field and the relevant results will display in the Available Fields list. Please note that Sugar automatically appends the wildcard character (%) to the beginning and end of your search phrase. This allows the system to return all fields that include the keyword entered in the search.

Related Module Filters

The Related Modules list shows all modules that have a relationship with the target module. To filter on a field in a related module, choose the name of the module (e.g. Documents) in the Related Modules list, and the Available Fields list below will display fields belonging to the related module. You can select the desired field(s) from the related module to add as a filter for your report. Please note that only fields marked as "Reportable" in Studio will display in the Available Fields list. For more information on marking fields as reportable, please refer to the Studio documentation in the Administration guide.

You can also use the search feature above the Available Fields list to easily locate a desired field. Simply enter the appropriate keyword (e.g. billing, date, etc.) in the search field and the relevant results will display in the Available Fields list. Please note that Sugar automatically appends the wildcard character (%) to the beginning and end of your search phrase. This allows the system to return all fields that include the keyword entered in the search.

Filter Values

Once the filter has been created, you can specify what field values constitute a match for the report in the Define Filters section. Select the appropriate value from the corresponding dropdown list and enter the relevant value in the open text box (if applicable).

Please note that if the assigned user or a member of your team changes or adds a new filter, the system alerts you that the report filters have been modified since last run when you save and run the report.

Run-Time Filters

The run-time option in the Define Filters step allows you to make the filter(s) available on the saved report, which enables you to quickly change your filter values without having to edit the report. Simply mark the Run-time box for any filter(s) you wish to view on the saved report.

Once the report is created and saved, the run-time filter (e.g. "Accounts > Date Created") will appear on the generated report view. You can change the filter values directly from the report view by selecting the new filter values from the dropdown list and clicking "Apply" or "Run Report" at the top of the report's detail view. Clicking the Reset button will reset the run-time filter back to the original filter value you set.

Please note that the Report Wizard retains the original filter value(s) you set when building the report regardless of the changes you or other users make on the run-time filters on the report's detail view. If the report is shared by a team, then each user can run the report with different run-time filter values to meet their individual needs. The run-time filter values set by each user will be preserved for future viewing until they change or reset the value.

Operators

When building the report, you have the option to choose between two operators, "AND" and "OR", using dropdowns within the Define Filters section. By default, operators are set to "AND" which will cause the filters to work cumulatively. All filters or groups of filters under an AND operator will need to be true for a record in order for that record to appear in the report result. Changing an operator to "OR" will mean that if any single filter under that "OR" is true for a record, the record will be included on the report. The OR operator accepts records matching any of the filters while the AND operator accepts records matching all filters.

Filter Groups

By default, all filters will be added to a single group. To split filters into multiple groups, use the Add Filter Group button.

When you have more than one filter group and click a new filter field, Sugar will prompt for which filter group the new field should belong.

Filter groups and operators can be combined to achieve complex filtering situations. For example, if we need a report for documents belonging to accounts created prior to the first quarter where the document is either new this week or new this month if connected to a lead, we would use the following filter groups with an OR operator joining the two together:

Filters on Date and Datetime Fields

When creating reports in Sugar, specifying a range of time is a useful way to isolate your desired results. Sugar provides a set of pre-defined options to help you easily target the most common date ranges:

Date Range Filter	Definition
On	A specific day
Before	Any value before the specified date
After	Any value after the specified date
Is Between	Any values after a specified start date but before a specified end date
Not On	Any values except the specified date
Is Empty	No date set for the field
Is Not Empty	Any date set for the field
Yesterday	A value set to the prior day
Today	A value set to the current day
Tomorrow	A value set to the following day
Last # Days	Any values within the last X days including the current day
Next # Days	Any values within the next X days including the current day
Last 7 Days	Any values within the last 7 days including the current day (e.g. Running on Monday includes the previous

	Tuesday morning through the end of the current Monday)
Next 7 Days	Any values within the next 7 days including current day (e.g. Running on Monday includes the the current Monday morning through the end the following Sunday)
Last Month	Any values that fall within the prior calendar month
This Month	Any values that fall within the current calendar month
Next Month	Any values that fall within the next calendar month
Last 30 Days	Any values within the last 30 calendar days including the current day
Next 30 Days	Any values within the next 30 calendar days including the current day
Last Quarter	Any values within the prior quarter defined by the calendar year (e.g. January - March, April - June, etc.)
This Quarter	Any values within the current quarter defined by the calendar year (e.g. January - March, April - June, etc.)
Next Quarter	Any values within the upcoming quarter defined by the calendar year (e.g. January - March, April - June, etc.)
Last Year	Any values within the prior calendar year
This Year	Any values within the current calendar year
Next Year	Any values within the upcoming calendar year

Additionally, if your administrator has configured the Forecasts module via Admin > Forecasts, additional options based on your organization's fiscal year will be available. If your fiscal year follows a traditional calendar year, these options will function in the same way as the corresponding options above:

Date Range Filter	Definition
Previous Fiscal Year	Any values within the prior fiscal year
Previous Fiscal Quarter	Any values within the prior quarter

	defined by the fiscal year
Current Fiscal Year	Any values within the current fiscal year
Current Fiscal Quarter	Any values within the current quarter defined by the fiscal year
Next Fiscal Year	Any values within the upcoming fiscal year
Next Fiscal Quarter	Any values within the upcoming quarter defined by the fiscal year

For more information about configuring the Forecasting module, please refer to the [Forecast Configuration](#) documentation in the Administration guide.

Note: When generating reports with datetime filters, Sugar will always adjust the results to ensure they are accurate according to the time zone settings of the user accessing the report. For instance, a user on Eastern Standard Time (-5 GMT) may see a different set of results for a report than a user on Pacific Standard Time (-8 GMT) because the date ranges are adjusted for the user's time zone.

Report Display Columns

The display columns step allows users to select which field(s) they would like included when generating the report. The system will pull data specific to these fields based on the report criteria for the associated module record. When you select a field from the Available Fields list, they will be added to the right of the list with the displayed path of the field (e.g. Contacts > Assigned to User > User Name). The displayed field paths show users where the field is originating from to retrieve the value for the report. For example, although "Email Address" appears as a field in several modules (e.g. Accounts, Contacts, Leads, etc.), email addresses are actually stored in their own table and are related to the modules where they appear as opposed to being direct fields of those modules. So, the corresponding displayed path will show the primary module record, then the related module followed by the field name (e.g. Contacts > Email Address > Email Address) since the email address field is a field of the related Email Address module.

To remove any unecessary fields from the display column list, simply click the "-" sign to the far right of the displayed field path row.

Changing Display Column Labels

By default, the selected display column fields will display stock labels which can be changed if you desire. To change the label, simply enter in the new label name in the open text field then click outside of the text box to preserve the change.

Changing Display Column Order

You can change the left-to-right order of the display columns by dragging and dropping the displayed field paths in the Choose Display Columns section.

Defining Column Sort

You can also designate the generated report to be sorted by a specific field column in either ascending or descending order. Simply mark the radio button next to the field label then select "Ascending" or "Descending" in the corresponding dropdown list. Please note that only one display column can be designated to sort by default in the report.

Optional Related Modules

The Optional Related Modules option will appear on the Report Details step if you add fields from related modules to the display column. Please note that if you want your report to include records whether or not they have data in the fields, you will need to mark the displayed module relationship(s) in the Optional Related Modules section. For example, if you add the email address field as a display column for the New Leads report, the Optional Related Modules section will display "Leads > Email Address". Check the box for the Email Address relationship in order to

include all applicable results even if the lead record does not contain an email address. By default, Sugar treats all related modules in a report as mandatory meaning that an email address will be required for a lead record to be included.

Leaving this box unchecked will exclude all lead records from your report that do not have an email address associated with them.

This holds true for all related modules. You will need to check the box for any relationship you do not wish to be treated as mandatory when Sugar is generating your report.

Show Query

The Show Query option is only visible to system administrators and displays as a checkbox on the Report Details step. If the Show Query box is checked and the Preview button is clicked, the generated report will display all the SQL queries at the bottom of the page for administrators to use and analyze how the specific data was retrieved in the system.

Viewing Reports

There are various options available for viewing reports in Sugar including via the Reports list view, Reports detail view, Reports Recently Viewed menu, and dashlets. Please note that you will only be able to see reports as allowed by your team membership, user access type, and assigned roles. For more information on

teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide.

Viewing Via List View

The Reports list view displays all reports meeting the current search criteria. To access the list view, simply click the Reports module tab. While list view shows basic report information (e.g. report name, report type, target module for report, etc.), you can click the report's name to view the data in the report's detail view. For more information on viewing reports via list view, please refer to the [Reports List View](#) section of this documentation.

Viewing Via Detail View

The Reports detail view displays key data specific to the report including the display column fields, display summaries, charts, etc. The detail view can be reached by clicking a report record's link from anywhere in the application including from the Reports list view. For more information on viewing reports via detail view, please refer to the [Reports Detail View](#) section of this documentation.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which reports you have recently viewed. Hover on the [Reports module tab](#) to see a list of your most recently viewed reports and click each name to open the report in detail view.

Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets which allow users to get a quick view of various records, activities, reports, etc. You can view reports in report-based dashlets such as "My Favorite Reports" as well as view report charts via Report Chart dashlets. The My Favorite Reports dashlet will display all reports you have marked as favorites and you can click the report's name to open the report in detail view. For more information on utilizing and viewing dashlets, please refer to the [Home](#) section of the Home documentation.

Please note that only report types (e.g. Summation with Details-type, Summation-type, and Matrix-type reports) with charts can be added as dashlets on your Home page. The Add Sugar Dashlets option allows you to add basic out-of-the-box report charts as well as custom report charts from your favorite reports, saved reports, team reports, and global team reports. For more information on adding dashlets to your home page, please refer to the Adding Dashlets section of the Home documentation. To view the report's detail view from a Report Chart dashlet, simply click the Edit icon at the top of the dashlet menu bar.

Searching Reports

The Reports list view includes a Basic and Advanced Search to help you locate reports easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Reports list view below. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all reports that start

with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %accounts). This will pull up any report that has the word "accounts" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the [Search](#) documentation.

Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.

The buttons available in Basic Search panel have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.

Enter in the appropriate keyword in the basic search Title field then click the Search button. Once the search is complete, the relevant results will populate in the [list view](#) below the search panel. To see all reports to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters. Please note that you will only be able to see reports as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) in the Administration guide.

Advanced Search

Advanced Search offers a more in-depth search experience than Basic Search including additional fields, layout options, and saved search capability. From the Advanced search panel, you can click "Basic Search" for simplified searching.

The buttons, checkboxes, and dropdowns available in Advanced Search have the

following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- My Items : Select this box to return only reports assigned to you.
- My Favorite Reports : Select this box to return only reports you have marked as favorites.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the Layout Options section of the Search documentation.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section of the Search documentation.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select "My Favorite Reports" and enter in a report title to search, Sugar will only return reports with a matching name that you have marked as favorites. When searching by a multiselect or dropdown field (e.g. "Assigned to"), however, Sugar will return reports matching any of these selections. Once the search completes, the relevant results will populate in the list view below the search panel. To see all reports to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters.Please note that you will only be able to see reports as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.
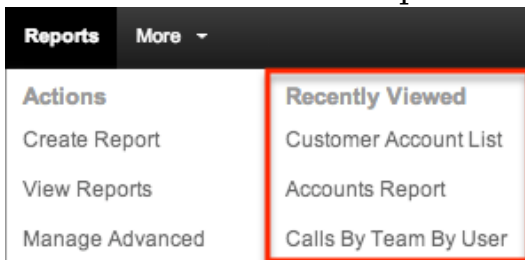
Reports List View

The Reports list view displays all reports meeting the current search criteria and to which your user has access. You can view the basic details of each report within the field columns. Please note that you will only be able to see reports as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

You have the option to change what fields are displayed in list view by configuring your layout options in the Reports Advanced Search. For more information on configuring your list view, please refer to the Layout Options section of the Search documentation.

Pagination

List view displays the current search results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. To the right just below the search panel you can see which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of your current results.

By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.

Checkbox Selection

You can perform several actions on report records directly from the list view by first selecting the desired reports. To select individual report records on the Reports list view, mark the checkbox on the left of each row. To select or deselect multiple report records on the list view, use the options in the checkbox dropdown menu:

- Select This Page : Selects all reports shown on the current page of report results.
- Select All : Selects all reports in the current search results across all pages of report results.

- Deselect All : Deselects all reports that are currently selected.

Delete Button

The Delete button to the right of the checkbox dropdown allows you to Delete one or more reports at a time. Please note that your ability to delete reports in Sugar may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Delete button.

Favorite Designation

Users have the option to mark report records as favorites via the list view as well as the detail view. This allows users to designate reports that are important or will be viewed often so that they can easily be accessed via search or from the Reports module tab. In the Reports list view, the star on the left of each report's row is yellow once marked to indicate a favorite report. For more information on how to mark records as favorites, please refer to the [Favoriting Reports](#) section of this documentation.

Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time. You can also set a default order-by column using the layout options in Advanced Search. For more information on setting a default column sort, please refer to the [Layout Options](#) section of the Search documentation.

Reports Detail View

The Reports detail view displays thorough report information including display column fields (if applicable), charts (if applicable), etc. The detail view can be reached by clicking a report record's link from anywhere in the application including from the Reports list view.

Please note that you will only be able to view a report according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation

in the Administration guide.

Actions Menu

The Actions menu on the top left of each report's detail view allows you to perform various actions on the current report. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the [System](#) documentation in the Administration guide.

The options in the Actions menu allow you to perform the following operations:

Run Report	Run this report to generate the result
Edit	Edit this report
Duplicate	Duplicate this report
Schedule	Schedule this report to be delivered via email
Print as PDF	Print this report as a PDF file
Export	Export this report result to a CSV file Note: Only available for Rows and Columns-type report
Delete	Delete this report

Favorite Designation

Users have the option to mark reports as a favorite via the detail view as well as the list view. This allows users to designate reports that are important or will be viewed often so that they can easily be accessed via Advanced search or from the Reports module tab. In the Reports detail view, the star on the right of the report's

name is yellow once marked to indicate a favorite report. For more information on how to mark reports as favorites, please refer to the [Favoriting Reports](#) section of this documentation.

Run-time Filters

Run-time filters allow you to quickly change the filter values on the report without having to edit the report. Please note that run-time filters only appear if filters are set in the Define Filters step when building the report. The report will be filtered based on the original filter value, but you can change the value via the Run-time filter and click "Apply" or "Run Report" to re-generate the report result. For more information on run-time filters, please refer to the [Run-Time Filters](#) section of this documentation.

Report Details

By default the report details box will appear displaying the reports name, display columns, report type, team(s) assigned to report, etc. To hide the report details, simply click the Hide Details button on the upper left of the report's detail view. Once the report details are hidden, the Show Details button will appear in place of the Hide Details button. Click the Show Details button to display the report details again.

Report Chart

Users have the option to display the data as a chart in report results if desired. The chart option is only available for Summation with Details-type, Summation-type, and Matrix-type reports. You can choose the chart type (e.g. Pie, Horizontal Bar, Vertical Bar, etc.) you want the report data displayed via the Chart Options step of the Report Wizard. Please note that at least one of the calculated fields (e.g. Count, AVG: Amount, SUM: Amount, etc.) in the Choose Display Summaries step must be selected in order to be able to select a chart type in the Chart Options step.

The report charts can also be added and displayed as a Sugar Dashlet on your Home page. For more information on viewing charts via dashlets on your Home Page, please refer to the Viewing Via Dashlets section of this documentation.Please note that at least one Group By and one Display Summary column is required to generate a chart.

The chart is displayed on the report by default, but you can hide the chart by simply clicking the Hide Chart button on the upper left above the chart. Once the report chart is hidden, the Show Chart button will appear in place of the Hide Chart button. Click the Show Chart button to display the chart again.

Report Chart Options

The Chart Options step of the Report Wizard allows users to choose the chart type they want displayed on the generated report as well as how the data will be summarized within the chart. Please note that at least one of the calculated fields (e.g. Count, AVG: Amount, SUM: Amount, etc.) in the Choose Display Summaries

step must be selected in order to be able to select a chart type in the Chart
Options step.

The following options are available in the Chart Options step of the Report Wizard:

- Chart Type : Select the chart type you want the data to be displayed on your
  report.
    - No Chart : No chart will be generated for the report result.
    - Horizontal Bar : The report data will be displayed in horizontal bars.
    - Vertical Bar : The report data will be displayed in vertical bars.
    - Pie : The report data will be displayed as a pie chart.
    - Funnel : The report data will be displayed as a funnel chart.
    - Line : The report data will be displayed as a line chart.

- Data Series : Select how you want the chart data to be summarized. The
  field(s) you select in the Choose Display Summaries step will be available to
  choose in this dropdown list.

- Description : Enter in a brief description to label the chart if you wish.
- Round Numbers Over 100000 : Check this box if you want numbers over
  100,000 to be rounded in the report charts. For example, 150,000 will be
  displayed as 150K.

Report Results

The report's detail view will display the report results with relevant data and
report chart (if applicable) for all records that meet the specified criteria. Please
note that each report type will display the report results differently and users
should consider how they would like to view the data prior to creating the report.

Rows and Columns Report Result

The report results for this report type displays the data in a simple rows and columns format. The display column field values for all records that meet the specified criteria will appear on the report result. You may edit records via the report by clicking the pencil icon next to the records name and view the record's detail view by clicking the record name. You can also sort the report results by a display column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. Please note that the report may be sorted by only one column at a time. To view an example Rows and Columns report result, please refer to the creating **Rows and Columns Report** section of this documentation.

Subject ⇕	Date Created ⇕	Status ⇕	Description
Follow up call ✎	02/28/2013 03:20pm	Held	Call with Sheena regarding new account.

Summation Report Result

The Summation Report provides an overview of the selected field data(s) grouped by specific criteria(s). The report result displays the data in groups summarized using computed derivatives (e.g. SUM, AVG, MAX, MIN) from numeric-type field values (e.g. opportunity amount, amount, etc.) as well as weighted amounts. Each field you select in the Define Group By and Choose Display Summaries will be displayed as a column in the report result. The field(s) in the Define Group By list determines how the data will be grouped on the report results table and the chart. For example, if you group the opportunity report by "User Name" then "Month: Expected Close Date" on the Define Group By list, the opportunity records will be grouped by the user assigned to the opportunity and each user will be broken up by month of the expected close date on the report result. The grand total of the summarized field values will display at the bottom of the report results page.

You can sort the report results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. Please note that the report may be sorted by only one column at a time. To view an example Summation report result, please refer to the **Creating Summation Report** section of this documentation.

User Name ⇕	SUM: Opportunity Amount ⇕
chris	$110,000.00
max	$125,000.00
sally	$255,000.00

Summation Report with Details Result

The Summation Report with Details groups the data and displays the total summary count for records in the report result. Unlike the Summation Report, this report type includes display columns for fields related to the target and related module. The report result willgroup the data in different categories based on the specified field values. If you choose to display the data as a chart, it will appear at the top of the report results page. The field values for all records that meet the specified criteria will be displayed in a rows and columns type table broken up into grouped panels.You can sort the report results by a field column ineither ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. Please note that the report may be sorted by only one column at a time. You may also edit records via the report by clicking the pencil icon next to the records name and view the record's detail view by clicking the record name.

Each panel header will display the grouped by field value(s) along with the total summary count for the group. You can collapse the grouped panels individually by clicking the double up arrow to the far left of the header or click "Collapse All" to collapse all panels. Collapsed panels will display the header with the display summaries for each group and you can click the double down arrow to open the panels again. The grand total for the summarized field values will appear at the bottom of the report results page. To view an example Summation with Details report result, please refer to the Creating Summation Report with Details section of this documentation.

Collapse All			
⋀ **Month: Expected Close Date = January 2012, SUM: Opportunity Amount = $75,000.00**			
Opportunity Name ⇕	**Opportunity Amount** ⇕	**Expected Close Date** ⇕	**Sales Stage** ⇕
Southern Realty - 1000 units ✎	$45,000.00	01/12/2012	Closed Won
B.C. Investing International - 1000 units ✎	$30,000.00	01/30/2012	Closed Won
⋁ **Month: Expected Close Date = February 2012, SUM: Opportunity Amount = $65,000.00**			

Matrix Report Result

The Matrix report groups the fields based on the group by fields and displays the summary for specific numeric-type field values that you select. The report result displays the data in a grid table with row and column headers. If you selected three group-by columns, then you will have the option to choose specific report layout's (e.g. 1x2 and 2x1) on the Report Details step. The 1x2 layout option will display the data for the first group-by field in a row and display the data for the other two group-by fields in columns. The 2x1 layout option will display the data for the first two group-by fields in rows and display the data for the third group-by field in a column. The report results will show the grand total for each field row on the table as well as for each column.To view an example Matrix report result, please refer to the Creating Matrix Report section of this documentation.

User Name	Month: Expected Close Date				Grand Total
	February 2013	January 2013	March 2013		
chris	$155,000.00				$155,000.00
max		$75,000.00	$100,000.00		$175,000.00
sally		$50,000.00			$50,000.00
Grand Total	$155,000.00	$125,000.00	$100,000.00		$380,000.00

Viewing Currency Fields

When the user's profile has the Show Preferred Currency option selected, all currency values will be displayed in reports using the user's preferred currency. The values will use the current conversion rate set in Admin > Currencies at the time the report is run. This means that the displayed value may not be historically correct for closed business since the conversion rate of the user's preferred currency may have changed since the purchase was completed.

When the user does not have this option selected, reports will display all currency values in the system's default currency. To keep amounts historically accurate, the conversion rate will only update on on currency fields when the business is still open and under the following scenarios:

- The record undergoes a save event (e.g. mass update, manual save, etc.) and the record's currency has a different conversion rate defined in Admin > Currencies than is currently saved.
- An administrator updates the currency exchange rate under Admin > Currencies. This will trigger a scheduled job which updates all records saved with that currency to the new rate.

For more information about currency exchange rates, please refer to the Currencies documentation in the Administration guide.

Running Reports

Once the reports are generated and saved in Sugar, you can view the report results at any time. While viewing the report's detail view, there may be times when you need to re-run the report to generate new report results. The Run Report button on the upper left of the report's detail view allows you to refresh and run the report to re-generate report results. For example, if you make a change to the run-time filter on the report, you can click "Run Report" to generate the report based on the new filter values. For more information on run-time filters, please refer to the Run-Time Filters section of this documentation. You can also click "Run Report" each time you want to re-generate the report to capture new records not included in the current report results.

Editing Reports

Reports may be edited at any time to update or add information to the report. There are various methods of editing the report from the Reports detail view, Reports list view, and dashlets. Regardless of where you initiate the edit from, you will always go through the Report Wizard to make the necessary changes to your report. You can edit the report by going through the Report Wizard step-by-step by clicking the Back and Next button or clicking the link (e.g. Define Filters, Choose Display Columns, Choose Display Summaries, etc.) at the top of the Report Wizard to edit a specific step. Once the changes are complete, click "Save and Run" to preserve the changes made and generate the report.

Please note that your ability to edit reports in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

Editing Via Detail View

You can edit reports via the detail view by clicking "Edit" in the Actions menu on

the upper left of the page. This will open the Report Wizard where you can make the necessary updates to the various steps (e.g. Define Filters, Define Group By, Choose Display Columns, Choose Display Summaries, etc.). Once the changes are complete, click "Save and Run" to preserve the changes made and generate the report.

Editing Via List View

You can edit reports via the [list view](#) by clicking the Pencil icon to the left of each report's name. This will open the Report Wizard where you can make the necessary updates to the various steps (e.g. Define Filters, Define Group By, Choose Display Columns, Choose Display Summaries, etc.). Once the changes are complete, click "Save and Run" to preserve the changes made and generate the report.

Editing Via Dashlet

There are various ways to edit reports via the dashlets on the Home page. For the My Favorite Reports dashlet you can click the reports name to open the reports detail view then click "Edit" in the Actions menu to make the necessary changes. Once the changes are complete, click "Save and Run" to preserve the changes made and generate the report.

For the Report Chart dashlets, you can click the Edit icon at the top of the dashlet menu bar to open the reports detail view then click "Edit" in the Actions menu to make the necessary changes. Once the changes are complete, click "Save and Run" to preserve the changes made and generate the report.

Deleting Reports

If a report is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Reports detail view or list view. Deleting via the detail view allows you to delete a single report while the list view allows for mass deleting multiple reports at once.

Please note that your ability to delete reports in Sugar may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

Deleting Via Detail View

Use the following steps to delete a report via the detail view:

1. Navigate to a report's detail view.

2. Select "Delete" from the Actions menu.

3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Mass Deleting Via List View

Use the following steps to delete one or more reports via the list view:

1. Navigate to the Reports list view by clicking the Reports module tab.
2. Use the [Basic](#) or [Advanced Search](#) to find the reports you wish to delete.
3. Select the desired reports individually or using the [checkbox dropdown's](#) options.
4. Click the Delete button.

5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Due to PHP memory limitations on the server, there may be occasions when the application times out while deleting a large number of reports. If you encounter an error when performing this action, we recommend selecting the reports in smaller batches.

Exporting Reports

Sugar's Export option allows users to download the data in reports as a .CSV (comma-separated values) file. Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the [Export](#) documentation. This may be useful when

needing to use the report data with other software such as Microsoft Excel or to update existing records by creating a report (including Record ID's), exporting, making changes, then importing the altered data back into Sugar. For more information on updating existing records via import, please refer to the [Import](#) documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a report with a large amount of data. If you encounter an error when performing this action, we recommend breaking up the report in smaller batches.

Please note that your ability to export reports from Sugar may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

Duplicating Reports

You can create a new report by duplicating an existing report in Sugar. The duplicate option is useful if the report you are creating has similar information to an existing report, so there is less new data for you to enter. You have the option of duplicating the report as the original report type that you are currently viewing or any of the other three report types.

The following steps cover creating a report by duplicating an existing Rows and Columns-type report as an example:

1. Navigate to a report's detail view.
2. Click the Actions menu and select "Duplicate".
3. Choose the report type you would like the duplicated report to be.

4. Go through the Report Wizard to select and enter new data as necessary then enter a new name for the report and save.
   o Please note that if you select a report type other than the original type, there may be additional or less steps in the Report Wizard to complete and you may need to edit the report as necessary to meet the specific report type requirements.

Scheduling Reports

Reports in Sugar can be scheduled to be emailed to users periodically based on specified date and time intervals. Please note that each individual user has to schedule the report in their Sugar account in order for the reports to be delivered to them. Sugar will run the report at the specified interval based on the set time zone in user preferences and sends it as a PDF file to your email address on file. Please note that the outbound mail server for the system as well as the user's email settings must be configured properly in order for the reports to be delivered successfully. For more information on setting up the system email settings, please refer to the Email documentation in the Administration guide. For more information on setting up your user preferences' email settings, please refer to the

The Run Report Generation Scheduled Tasks scheduler in Sugar processes all scheduled reports to be delivered to the user at the scheduled interval. By default, the report scheduler is set as "Inactive" for new Sugar installations. Administrators must check to make sure that the Run Report Generation Scheduled Tasks scheduler is active and the settings (e.g. interval) are configured properly. F or example, if the scheduler is set to trigger once per day and a user schedules a report to be delivered every hour, the report will only be delivered once each day due to the set interval in the scheduler. The administrator must change the interval for the scheduler to run every 1 hour in order for the users report to be processed and delivered per their scheduled interval.For more information on configuring schedulers, please refer to the Schedulers section of the System documentation.
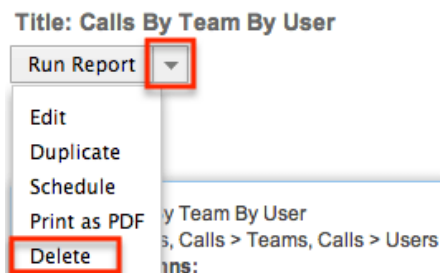
Scheduling Via Detail View

Use the following steps to schedule the report via the detail view:

1. Navigate to a report's detail view.
2. Select "Schedule" from the Actions menu.

Open Calls ☆

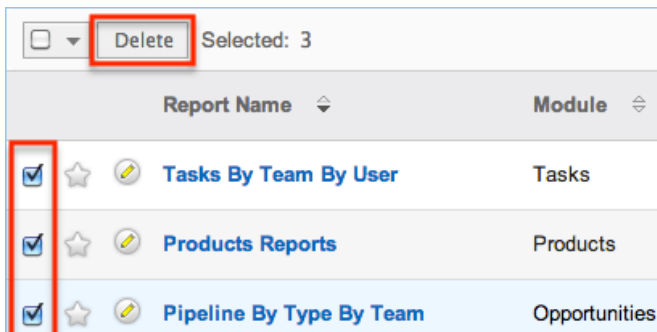Title: Open Calls

Run Report ▼

Edit
Duplicate
Schedule
Print as PDF Calls

3. Enter the start date/time and select the time interval for report delivery. Check the Active checkbox and then click "Update Schedule" to schedule your report.
   ○ Please note that you must mark the Active box in order to activate the report schedule.

Schedule Report

| Start Date: | 03/18/2013 | 🗓 | 09 ⇕ | : | 00 ⇕ | am ⇕ | Active: | ☑ |
| Time Interval: | Daily | ⇕ | | | | | Next Email: | -- none -- |

Update Schedule

Once the report is scheduled successfully, the date and time for the scheduled report will appear in the list view row for the specific report. If you do not see the scheduled date and time under the Schedule Report column in the list view, then check your scheduled report again to make sure it was set up properly.

Report Name ⇕	Module ⇕	Report Type ⇕	User ⇕	Schedule Report
2013 Accounts Report	Accounts	Rows and Columns	Sarah Smith	03/18/2013 09:00am

Scheduling Via List View

Use the following steps to schedule the report via the list view:

1. Navigate to the Reports list view by clicking the Reports module tab.
2. Use the [Basic](#) or [Advanced Search](#) to find the reports you wish to schedule.
3. Go to the Schedule Report column for the specific report in the list view and click on the --none-- link.

4. Enter the start date/time and select the time interval for report delivery. Check the Active checkbox and then click "Update Schedule" to schedule your report.
    - Please note that you must mark the Active box in order to activate the report schedule.

Once the report is scheduled successfully, the date and time for the scheduled report will appear in the list view row for the specific report. If you do not see the scheduled date and time under the Schedule Report column in the list view, then check your scheduled report again to make sure it was set up properly.

Printing Reports as PDFs

Sugar's Print as PDF option in the Reports module allows users to download the reports to PDF files and save on their local machine. This may be useful when needing to email the file to other members of the team to share the report data or to keep track of key historical data from the system. You can also view charts on the downloaded PDF files for Report types (e.g. Summation Report with Details, Summation Report, Matrix Report) with chart options.

Please note that your ability to print reports as PDF from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Print as PDF option.
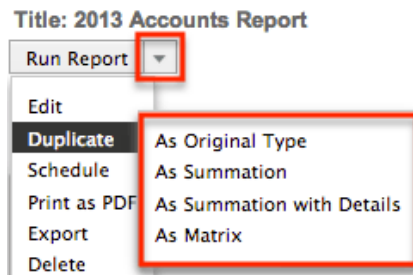
Use the following steps to print reports as PDF's via the Reports detail view:

1. Navigate to a report's detail view.
2. Select "Print as PDF" from the Actions menu.

3. Open the downloaded PDF file to view the report and save to your local machine if you wish.

Favoriting Reports

Each Sugar user has the option to designate their own favorite reports which are important or will be viewed often so that they can easily be accessed via Advanced search or from the Reports module tab. Once reports are marked as favorites, use the My Favorite Reports checkbox in the Reports Advanced Search to retrieve your favorites or select from your most recent favorites directly from the Reports module tab.

Favoriting Via List View

Use the following steps to mark reports as favorites via the Reports list view:

1. Navigate to the Reports list view by clicking the Reports module tab.
2. Use the Basic or Advanced Search to find the Report records you wish to mark as favorites.
3. Mark the star icon on the left of each desired report's row.
4. To remove the report as a favorite, click the star again to revert it to white.

Favoriting Via Detail View

Use the following steps to mark records as favorites via the Reports detail view:

1. Navigate to a report's detail view.
2. Click the star icon to the right of the report's name in the upper left of the detail view to designate it as a favorite.
3. To remove the report as a favorite, click the star again to revert it to white.

2013 Accounts Report ☆

Title: 2013 Accounts Report

Run Report ▾

Adding Report Results to Target Lists

A target list consists of a group of individuals or organizations you wish to be included or excluded on a mass marketing campaign. These targets are typically identified based on a set of predetermined criteria such as being a prospect or existing customer, age group, industry, etc. The Reports module gives users the ability to add a large number of records (e.g. Contacts, Leads, Accounts, etc.) to a target list at once instead of selecting them one-by-one. For example, if you need to add all leads in the state of California to your target list, you can create a report based on the Leads module filtered by the Primary Address State field (e.g. CA). Once the report is created and saved, you can navigate to the Target Lists module to add the report results to the specific target list. Go down to the Leads subpanel in the Target List's detail view, click the Actions menu, then choose "Select from Reports". Select the saved lead report from the pop-up window and all lead records from the selected report will be added to the target list.

⋀ Leads

Create ▾

Select
Select from Reports | ed By ⇕ | Lead Source ⇕ | Office Phone ⇕

Cold Call | (483) 552-3500

For more information on adding records to target lists, please refer to the Target Lists documentation. Due to the PHP memory limitations on the server, there may be occasions when the application times out while adding the report to a target list. If you encounter an error when performing this action, we recommend breaking up the report in smaller batches.

Last Modified: 09/26/2015 06:25pm

Export

Overview

There may be times in which users will want to access, review, or manipulate information from their Sugar database in another format outside of Sugar. To facilitate this process, users have two options on ways to export their data from Sugar. Upon exporting data from Sugar, a CSV ("Comma Separated Value") format file will be downloaded to the user's computer. This file can be reviewed in Microsoft Excel, Notepad, or other spreadsheet tools and text editors.

Exporting restrictions can be controlled by a System Administrator via Admin > Locale. For more information on the Locale menu, please refer to the [Locale](#) section of the Administration guide. An administrator also has the option to create a Role hindering regular users' access to the export functionality. Please refer to the [Role Management](#) section of the Administration guide for more information on setting roles for users.

Exporting From Module List Views

The first type of export that will be covered is exporting from the module list view. When exporting this way, the downloaded file contains every field from the database within the given module for the specified record or records. This export will not include any information from records which are associated via relationships to this module.

This export method is most useful when performing a type of data migration, needing an excess of detail, or performing a comprehensive import and update of the data, since this method exports all fields within a module. It is recommended the [Export From Reports](#) functionality be used for any other export use case to isolate the specific information needed.

Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Use the following steps to export from list view:

1. Navigate to the list view of the module by clicking on the module tab.

2. Use the [Basic](#) or [Advanced Search](#) functionality find the records you would like to export.
3. Select the desired records individually or by using the checkbox dropdown's options.

4. Choose "Export" from the Actions menu.

5. The CSV file will be downloaded to your local computer to a location defined by your browser settings. The file can then be read and manipulated depending as needed.

Exported Files From List View

When data is exported from Sugar, the file that is produced is a CSV, or "Comma Separated Value" file. When viewed in a plain text editor, a CSV file looks like a long string of text with groupings of text separated with quotation marks and

commas (e.g. "First Name","Last Name","Title"). The file first lists out all columns that are in the file, and then the corresponding rows follow, also separated by quotation marks and commas (e.g. "Dusty","Connor","IT Developer").

However, most spreadsheet software, such as Microsoft Excel, will read this file and convert the quotation marks and commas into rows and columns. This makes your data much easier to read and turns it into a useful format that can be manipulated and repurposed as need be.

	A	B	C
1	First Name	Last Name	Title
2	Dusty	Connor	IT Developer

The records that appear in your spreadsheet are dependent on what type of search, if any, you did prior to your export.

When exporting from list view, the user is left with every part of the module database information, which is often not all readable by the user. This file will only contain information specific to the module where the export was performed. This exported data will comprise of all stock and custom fields from the module. No data that would normally be found in a subpanel will appear on this export.

Exporting From Reports

In addition to exporting from a list view, users also have the option to export data from a report. Using a Rows and Columns report, users can select the specific fields they would like to see on the export file and filter the module data however they would like. The advantage to using reports is that users will only be presented with the data that they need, and no excess data. In addition, users can also export data from related modules using reports, which is not possible when Exporting From Module List Views . Finally, because the reports are much more focused and specific, there is a higher threshold of the quantity of records that can be exported before encountering a timeout or any other such issues.

Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of contact records. If you encounter an error when performing this action, we recommend filtering the records in smaller batches.

For more information on creating your report, please refer to the Reports documentation.

Use the following steps to complete an export from a report:

1. Select an existing Rows and Columns report from the Report module's listview, or create a new one based on the information that you would like to export.
2. Click on the actions menu of the report details and select "Export".

3. The CSV file will be downloaded to your computer to a location defined by your browser settings. The file can then be read and manipulated at will.

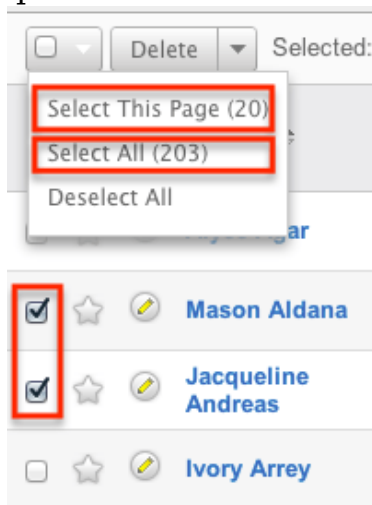When exporting from a report, the data is more well-rounded for a user to review. The user is allowed to determine what fields should be included on the export. This means that while reviewing it in a spreadsheet, the information appears exactly as it does in Sugar. This makes for a more positive user experience and a more focused export file. In addition, the user is able to utilize modules related to the reported-on module. This makes the report more useful in a business sense for individual users.

Exported Files From Reports

When data is exported from Sugar, the file that is produced is a CSV, or "Comma Separated Value" file. When viewed in a plain text editor, a CSV file looks like a long string of text with groupings of text separated with quotation marks and commas (e.g. "First Name","Last Name","Title"). The file first lists out all columns that are in the file, and then the corresponding rows follow, also separated by quotation marks and commas (e.g. "Dusty","Connor","IT Developer").

However, most spreadsheet software, such as Microsoft Excel, will read this file and convert the quotation marks and commas into rows and columns. This makes your data much easier to read and turns it into a useful format that can be manipulated and repurposed as need be.

The information that appears in your spreadsheet is dependent on what filters you added to your report and which display columns exist. Only the information that shows in the display columns when you view your final report is what will be

included in your CSV export.

Import

Overview

Sugar provides all users with access to import functionality for most modules. Using this functionality, users can add large amounts of database records at one time to Sugar. Importing is available for the following modules:

- Accounts
- Bugs
- Calls
- Cases
- Contacts
- Contracts
- Custom modules (if applicable)
- Leads
- Meetings
- Notes
- Opportunities
- Products modules (Manufacturers, Products, Product Catalog, Product Category, Product Types, Tax Rates)
- Targets
- Tasks
- Users (Requires Admin role)

When importing through any of the above modules, Sugar presents users with a wizard to help guide users through the process of creating and updating records.

Importing can be useful to enter historical or existing data, migrating from your previous CRM system, adding a list of new customers or leads, or updating a large amount of records at once.

Import Guidelines

Importing is a very important process for users brand new to using Sugar or to those who have been using Sugar for years. Depending on your business, you may run imports anywhere from multiple times per week, to only a few times or less per

year. Regardless of the import frequency, all users will have to follow the same type of process and follow the same guidelines.

- File Delimitation : Sugar accepts files that are delimited by a given separator, such as commas or tabs. The most common type of import will be using a CSV (Comma Separate Value) file, but Sugar will accept other file types as long as it recognizes the delimiter.
- Imposed Limitations : Sugar, by default, does not impose any type of import imitations. However, System Administrators can impose a limit on the amount of rows or records that can be imported at one time. This limitation is found in Admin > System Settings > Advanced > Import - Maximum Number of Rows. Administrators can also limit what modules users are allowed to import into through the use of [Roles](#).
- Scrub Data Before Import : It is strongly recommended that all data is reviewed and scrubbed before importing. It is much easier to see if you are importing good data or that you have removed all duplicates before importing than finding them after they are already in Sugar and are already in use by other users. In addition, you want to ensure standardized fields such as dates, phone numbers, etc. adhere to a common format so that the import will run as smooth as possible.
- Parent Records First : When importing any records that use a relationship to another module, such as the Account - Contact relationship, it is best to try importing the parent, or higher level, records first. This is demonstrated with a one-to-many relationship between the two modules. In this case, it is best to import accounts first and then contacts, which rely on account records.

Importing New Records

The first type of import that will be covered is importing new records. Whether you are just starting a migration from another CRM to Sugar or if you are adding a new list of records that you have received, such as a new list of leads or accounts, this process will help to get the data into Sugar without having to manually enter each record. After you have your import file that is scrubbed and ready to be imported, follow these steps to import this list into Sugar.

1. Navigate to the module tab for the module that you are importing into and select the import option. This will open the Import Wizard and bring you to the"Upload Import File" screen.

2. If you would like to review the Import File Template, you can download it from this page. This will give you a template of the format Sugar is going to be using to import your data. For more information on the template, please review the Import File Template section of this documentation.

3. Select the import file that you are going to use to import by clicking the Choose File button. When prompted, select the file from your computer and it will appear in this box.

4. Ensure that "Create new records only" is selected.

5. If you have preformed imports before and have previously saved your import settings, you can select your setting at the bottom of the page using the "To use pre-set import settings, select from below" option. If you do not have any saved import settings, this section will not appear. For more information on saving mapping, please review the Saving Field Mappings section of this documentation.

6. Click "Next" to access the "Confirm Import File Properties" screen.

7. This screen will show you the first two rows that Sugar is going to try to import as an example to let you know that your file was read properly by Sugar.

8. The Import Wizard automatically detects the properties of the file that has been uploaded to ensure the best import possible. If you notice any mistakes or need to set up any advanced configuration, click "View Import File Properties". These changes are specific to the import and do not affect your standard user preferences.

9. If the file was exported from either Salesforce.com or Microsoft Outlook, select the corresponding option under "If the import file data was exported from any of the following sources, select which one". If not, leave this as "None". This option will set up your mapping properly on the next screen.
10. Click "Next" to access the Confirm Field Mappings screen.
11. Click the View Notes button for any relevant information, specific to this module, to the import that you are performing.

12. This screen presents you with four columns:

Header Row : This is the column header from your import file. This column will let you reference your file to make sure your column mapping is correct. If your import file does not have a header row, this column will not show.
Module Field : This column contains a dropdown list of all importable fields for the module. The Import Wizard tries to match the Header Row with the corresponding Sugar field. If the suggested mapping is incorrect, use the dropdown list to change the mapping. Required fields are marked with an asterisk (*).
Row 1 : This column contains the values from the first row of data in your import file. This is another aid to help ensure you have your mapping correct, so that you can see the mapping using real data and not just the headers. If your import file does not have column headers, there will be an additional column for Row 2.
Default Value : This column is hidden by default, but can be expanded if needed. When expanded, you have the option to fill in a value that will populate all records where a value for that field does not exist. For example, if you do not have anything populated in the Accounts Industry field, but you know this is a list of Technology companies, you can populate all blank values

in the Industry field with the value of "Technology".

13. Click "Add Field" if any data needs to be added to the import that is not on your import file. This can be used if you would like to assign a value to a record when the column is not on your import file. This is used in conjunction with the Default Value column. For example, if you are importing these accounts, but would like to assign them all to another user, John Smith, you would click the Add Field button, select the field from the Module Field column, and populate the desired value in the Default Value column. Now, all records will be assigned to John Smith upon import.

14. Click "Next" to access the Check for Possible Duplicates screen.
15. This menu allows users to check if there are duplicated values on the import to records that already exist in Sugar. This menu will vary depending on what module you are importing into as the fields will be specific to this module. The fields available to the Import Wizard are determined based off the system-defined indexes. This is why you will not see all fields shown on this list, but only a subset of fields from the module. If you would like to cross reference existing Sugar records against what is being imported, simply drag and drop the field name from the right column, "Available Fields", to the left column, "Fields to Check". For more information on duplicate checking, please review the Detecting Duplicates section of this documentation.

16. If the import configuration that you have set up is going to be used again in the future for additional imports, add a name at the button of the page so that it can be referenced later. For more information on saved field mappings, please review the Saving Field Mappings section of this documentation.

17. When your duplicate checking settings are complete, click "Import Now" to begin the import.
18. After the import completes, you are brought to the "View Import Results" page. Here, you are provided with a summary of the import.

19. The summary will tell you how many records were created, how many were not created due to an error, and how many were found as duplicates.
20. There are three buttons below the Summary:
    Undo Import : If there was a mistake in the import that you realized after importing, you can check this button. All records that were created via the import will be deleted. This button cannot be re-accessed for this import. As soon as you navigate away from this page, the import is considered complete.
    Import Again : Click this button if you would like to go back to the first step of the Import Wizard and perform additional imports. Clicking this button will consider the import to be complete.
    Exit : This button will also consider the import to be complete, but will bring you back to the module's list view to be able to further review or search your records.
21. There are also three tabs on the summary page under the action buttons:
    Created Records : This tab will show you a list view of all of the records that were properly imported on this import.
    Duplicates : This tab will present you with any records that were not imported due to the Import Wizard finding duplicates from Step 15. There is an option to download a list of the duplicates, which produces a new CSV file. You have the option to download this list, make any changes, and import again following this same process.

    Errors : This tab will show you any records that were not imported due to an error during the import process. This is usually seen when there is a problem with data that is on one of the records or rows in the CSV file. For instance, if you are missing a value for a required field, or a field is formatted incorrectly.

Similar to the option to download duplicate records, you also have the option to download the list of errors using the two links provided.

The "Download list of errors" option will produce a new CSV file with columns showing (from left to right) the error, the field affected, the value, and the line on your original import file where the error occurred.

The "Download list of rows that were not imported" option will download a new CSV file with the same format of your original one, containing only the rows that were not imported so that you can clean them up and then re-import.

22. Once you have downloaded the desired lists and reviewed the import, the buttons mentioned in Step 20 can be used to complete your import.

Importing Updates to Existing Records

In addition to importing new records, Sugar's Import Wizard also has the functionality to use an import file to update existing Sugar records. The process runs very similar to the new record import process described above.

The most important aspect to importing updates to existing records is that Sugar will only update records where there is a matching ID in the import file. Every Sugar record, regardless of what module it is in, is defined with an alphanumeric ID field. This field is typically a 36-character alphanumeric value but may be less if

imported from a previous CRM. This field is the only way that the Import Wizard will know which record to update.

Note: All other fields (name, email address, etc.) are not considered unique and can have duplicates, so only the ID field will work to differentiate records for an update from import.

The ID field is not usually shown within Sugar and must be found either by running a report or an export within the module.

During the import, if there are any other records without ID fields and they are on the import file, they will create new records, which will create duplicates in your database.

To import updates, follow the steps below.

1. You will have to get the ID numbers for all of the records that you are going to be updating to prepare your import file. The most common methods are either by exporting a list of records from the module list view, or by running a report and exporting the results. For more information on exporting, please review the [Export](#) documentation.
   Export from List View : This option will include the record ID field, but it is recommended that you open the file in a spreadsheet editor (Microsoft Excel) and delete any columns that you are not updating. Be sure to leave the ID field and any required fields, such as Name, as the import will not complete without these.
   Export from Report : If you choose to run a report, be sure to include the ID field in your display columns so that the records can be matched up. You will also want to include any required fields, such as Name, as the import will not complete without these. Please note that only Rows and Columns reports can be used for exports.
   After you have your file ready for import, you can proceed with working through the Import Wizard.
2. Navigate to the module tab for the module that you are updating and select the import option. This will open the Import Wizard and bring you to the " Upload Import File" screen.

3. If you would like to review the Import File Template, you can download it from this page. This will give you a template of the format Sugar is going to be using to import your data. For more information on the template, please review the [Import File Template](#) section of this documentation.

4. Select the import file that you are going to use to import by clicking the "Choose File" button. When prompted, select the file from your computer and it will appear in this box.

5. Select the option "Create new records and update existing records".

6. If you have performed imports before and have previously saved your import settings, you can select your setting at the bottom of the page using the "To use pre-set import settings, select from below" option. If you do not have any saved import settings, this section will not appear. If your CSV file was exported from Sugar, this is likely not a necessary step. For more information on saving mapping, please review the [Saving Field Mappings](#) section of this documentation.

7. Click "Next" to access the "Confirm Import File Properties" screen. Before the "Confirm Import File Properties" screen opens, you will be prompted with an alert informing you that updates made to existing records cannot be undone. Read, and then click "OK" to proceed.

8. This screen will show you the first two rows that Sugar is going to try to import as an example to let you know that your file was read properly by Sugar.

9. The Import Wizard automatically detects the properties of the file that has been uploaded to ensure the best import possible. If you notice any mistakes or need to set up any advanced configuration, click "View Import File Properties". These changes are specific to the import and do not affect your standard user preferences.

10. If the file was exported from either Salesforce.com or Microsoft Outlook, select the corresponding option under "If the import file data was exported from any of the following sources, select which one". If not, leave this as "None". This option will set up your mapping properly on the next screen. If this file was exported from Sugar, keep it set to "None".
11. Click "Next" to access theConfirm Field Mappingsscreen.
12. Click the View Notes button for any relevant information, specific to this module, to the import that you are performing.

13. This screen presents you with four columns:

Header Row : This is the column header from your import file. This column will let you reference your file to make sure your column mapping is correct. If your import file does not have a header row, this column will not show.
Module Field : This column contains a dropdown list for each row that contains the name of a field in Sugar. The Import Wizard tries to match the Header Row with the corresponding Sugar field. If the suggested mapping is incorrect, use the dropdown list to change the mapping. Required fields are marked with an asterisk (*).
Row 1 : This column contains the values from the first row of data in your import file. This is another aid to help ensure you have your mapping correct, so that you can see the mapping using real data and not just the headers. If your import file does not have column headers, there will be an additional column for Row 2.
Default Value : This column is hidden by default, but can be expanded if needed. When expanded, you have the option to fill in a value that will populate all records where a value for that field does not exist. For example, if

you do not have anything populated in the Accounts Industry field, but you know this is a list of Technology companies, you can populate all blank values in the Industry field with the value of "Technology".

14. Click "Add Field" if any data needs to be added to the import that is not on your import file. This can be used if you would like to assign a value to a record when the column is not on your import file. This is used in conjunction with the Default Value column. For example, if you are importing these accounts, but would like to assign them all to another user, John Smith, you would click Add Field button, select the field from the Module Field column, and populate the desired value in the Default Value column. Now, all records will be assigned to John Smith upon import.

15. Click "Next" to access the Check for Possible Duplicates screen.
16. This menu allows users to check if there are duplicated values on the import to records that already exist in Sugar. Duplicate checking will only apply to new records created by the import. For more information on detecting duplicates, please review the Detecting Duplicates section of this documentation.
17. If the import configuration that you have set up is going to be used again in the future, add a name at the button of the page so that it can be referenced later. For more information on saving mapping, please review the Saving Field Mappings section of this documentation.

18. Click "Import Now" to begin the import.
19. After the import completes, you are brought to the "View Import Results" page. Here, you are provided with a summary of the import.

20. The summary will tell you how many records were updated, how many were created, how many were not created due to an error, and how many were found as duplicates, as applicable.

21. There are three buttons below the Summary:
Undo Import : If there was a mistake in the import of any new records that you realized after importing, you can check this button. All new records that were created via the import will be deleted. After updating, no changes to updated records can be reverted. This button cannot be re-accessed for this import. As soon as you navigate away from this page, the import is considered complete. This button will not show if there were no new records created.
Import Again : Click this button if you would like to go back to the first step of the Import Wizard and perform additional imports. Clicking this button will consider the import to be complete.
Exit : This button will also consider the import to be complete, but will bring you back to the module's list view to be able to further review or search your records.

22. There are also three tabs on the summary page under the action buttons:
Created Records : This tab will show you a list view of all of the records that were properly imported on this import. If this was only an update, there will not be any records showing on this tab as it does not show updated records.
Duplicates : This tab will present you with any records that were not imported due to the Import Wizard finding duplicates from Step 16. There is an option to download a list of the duplicates, which produces a new CSV file. You have the option to download this list, make any changes, and import again following this same process. If you did not use any duplicate settings, this tab will be empty.

Errors : This tab will show you any records that were not imported due to an error during the import process. This is usually seen when there is a problem with data that is on one of the records or rows in the import file. For instance, if you are missing a value for a required field, or a field is formatted incorrectly.

Similar to the option to download duplicate records, you also have the option to download the list of errors using the two links provided.

The "Download list of errors" option will produce a new CSV file with columns showing (from left to right) the error, the field affected, the value, and the line on your original import file where the error occurred.

	A	B	C	D
1	Invalid datetime	Date Modified: (date_modified)	Yesterday	2
2	Required value missing	Name: (name)	NULL	3

The "Download list of rows that were not imported" option will download a new CSV file with the same format of your original one, containing only the rows that were not imported so that you can correct the errors and then re-import.

	A	B	C	D	E	F
1	Name	Billing City	Billing State	Billing Postal	Billing Count	Date_modified
2	SugarCRM	New York	NY	14402	USA	Yesterday
3		Los Angeles	CA	69904	USA	

23. Once you have downloaded the desired lists and reviewed the import, the buttons mentioned in Step 21 can be used to complete your import.

Importing Relationships

There are many situations where imports need to forge a relationship between two modules. A common example of this would be how importing contacts without an account name would leave the contacts orphaned and not linked to any parent account. To solve this problem, Sugar allows one-to-many and one-to-one relationships to be imported during the standard import process. The available fields will vary depending on the module being imported and will show on the

[Import Template](#).

When importing a relationship, Sugar will need the related record's unique ID, or, in some cases, will accept the record's Name field. Examples of the fields that relate one module to another are explained below.

Module	Module Related To	Field(s) Used For Relationship	Instructions For Import
Accounts	Accounts	Member Of	On the import file, add a column for "Member Of". You can use either the Sugar record ID or the exact name of the parent account. This will cause the imported record to be related to the parent account on the "Member Of" field. Using an account name that Sugar does not recognize will create an additional new account record. Note: If you are using the account name, it must be exactly as it shows in Sugar. For example, if your account in Sugar is "SugarCRM", but your import file contains "Sugar CRM" or "SugarCRN", the account will not relate properly.
		Parent Account Id	On the import template, there is a

			column for "Parent Account". Use the existing Sugar record ID of the parent account. The dropdown option for this is Parent Account Id. This will cause the imported record to be related to the parent account on the "Member Of" field.
	Campaigns	Campaign	Use the existing Sugar campaign name or campaign record ID to relate the account to the campaign record. Note: If you are using the campaign name, it must be exactly as it shows in Sugar. For example, if your campaign in Sugar is "End of Year Newsletter", but your import file contains "End of Year News" or "End of Year Promotion", the account will not relate properly.
		Campaign ID	Use the existing Sugar campaign record ID number to connect the campaign name into the new account record.
Calls	Contacts	Contact ID	Use the existing Sugar contact

			record ID number to connect the contact name into the new call record.
	Flex Relate	Related To Module Related To ID	On the import template, there are columns for both "Related To Module" and "Related To ID". Both need to be used to form the proper relationship. Related To Module: Related To ID: The ID for the record you are relating.
Cases	Accounts	Account ID	Use the existing Sugar account record ID to relate the case to the account record.
		Account Name	Use the existing Sugar account name or record ID to relate the contact to the account record. Note: If you are using the account name, it must be exactly as it shows in Sugar. For example, if your account in Sugar is "SugarCRM", but your import file contains "Sugar CRM" or "SugarCRN", the account will not relate properly.

Contacts	Accounts	Account ID	Use the existing Sugar account record ID to relate the contact to the account record.
		Account Name	Use the existing Sugar account name or record ID to relate the contact to the account record. Using an account name that Sugar does not recognize will create a new account record with a relationship to the contact. Note: If you are using the account name, it must be exactly as it shows in Sugar. For example, if your account in Sugar is "SugarCRM", but your import file contains "Sugar CRM" or "SugarCRN", the account will not relate properly.
	Campaigns	Campaign	Use the existing Sugar campaign name or campaign record ID to relate the contact to the campaign record. Note: If you are using the campaign name, it must be exactly as it shows

			in Sugar. For example, if your campaign in Sugar is "End of Year Newsletter", but your import file contains "End of Year News" or "End of Year Promotion", the contact will not relate properly.
		Campaign ID	Use the existing Sugar campaign record ID number to connect the campaign name into the new contact record.
	Contacts	Reports To	Use the existing Sugar contact record ID number to connect the new contact and the existing one.
	Emails	Email Address	Importing an existing email address into Sugar will cause all related emails to that email address to be associated to the contact record. The email address must be exact for the relationship to form properly.
Leads	Accounts	Account ID	Use the existing Sugar account record ID to relate the lead to an existing account record. This is not a relationship that can be forged from

			the Leads module in Sugar. This can be created from an Account record though. This relationship is usually formed through the Lead Conversion process.
		Account Name	In Leads, this is just a text field. This will not create any relationships. Upon conversion an Account can be created. For more information on converting leads, please review the documentation.
	Campaigns	Campaign	Use the existing Sugar campaign name or campaign record ID to relate the lead to the campaign record. Note: If you are using the campaign name, it must be exactly as it shows in Sugar. For example, if your campaign in Sugar is "End of Year Newsletter", but your import file contains "End of Year News" or "End of Year Promotion", the lead will not relate properly.
		Campaign ID	Use the existing Sugar campaign record ID number

			to connect the campaign name into the new lead record.
	Contacts	Contact ID	Use the existing Sugar contact record ID to relate the lead to an existing contact record. This is not a relationship that can be forged from the Leads module in Sugar. This can be created from a contact record though. This relationship is usually formed through the Lead Conversion process. For more information on converting leads, please review the documentation.
	Opportunities	Opportunity ID	Use the existing Sugar opportunity record ID to relate the lead to an existing opportunity record. This is not a relationship that can be forged from the Leads module in Sugar. This can be created from an opportunity record though. This relationship is usually formed through the Lead Conversion process. For more information on

			converting leads, please review the documentation.
		Opportunity Name	In Leads, this is just a text field. This will not create any relationships. Upon conversion an opportunity can be created. For more information on converting leads, please review the documentation.
	Emails	Email Address	Importing an existing email address into Sugar will cause all related emails to that email address to be associated to the lead record. The email address must be exact for the relationship to form properly.
Meetings	Contacts	Contact ID	
			Use the existing Sugar contact record ID number to connect the contact name into the new meeting record.
	Flex Relate	Related To Module Related To ID	On the import template, there are columns for both "Related To Module" and "Related To ID". Both need to be used to form the proper relationship.

			Related To Module:
			Related To ID: The ID for the record you are relating.
Notes	Contacts	Contact ID	Use the existing Sugar contact record ID number to connect the contact name into the new note record.
	Flex Relate	Related To Module Related To ID	On the import template, there are columns for both "Related To Module" and "Related To ID". Both need to be used to form the proper relationship. Related To: The Sugar module's plural name for the record that you are going to relate (Accounts, Contacts, etc.). Related To ID: The ID for the record you are relating.
Opportunities	Accounts	Account ID	Use the existing Sugar account record ID to relate the opportunity to the account record.
		Account Name	Use the existing Sugar account name or record ID to relate the opportunity to the account record.

			Using an account name that Sugar does not recognize will create a new account record with a relationship to the opportunity. Note: If you are using the account name, it must be exactly as it shows in Sugar. For example, if your account in Sugar is "SugarCRM", but your import file contains "Sugar CRM" or "SugarCRN", the account will not relate properly.
	Campaigns	Campaign	Use the existing Sugar campaign name or campaign record ID to relate the opportunity to the campaign record. Note: If you are using the campaign name, it must be exactly as it shows in Sugar. For example, if your campaign in Sugar is "End of Year Newsletter", but your import file contains "End of Year News" or "End of Year Promotion", the opportunity will not relate properly.

		Campaign ID	Use the existing Sugar campaign record ID number to connect the campaign name into the new opportunity record.
Targets	Accounts	Account Name	In Targets, this is just a text field. This will not create any relationships.
	Campaigns	Campaign ID	Use the existing Sugar campaign record ID number to connect the campaign name into the new target record.
	Leads	Lead ID	Use the existing Sugar lead record ID to relate the target to an existing lead record. This is not a relationship that can be forged from either module in Sugar. This relationship is usually formed through the target conversion process. For more information on converting targets, please review the documentation.
Tasks	Contacts	Contact ID	Use the existing Sugar contact record ID number to connect the contact name into the new Task

	Flex Relate	Related To ID	On the import template, there are columns for both "Related To ID" and "Related To Module". Both need to be used to form the proper relationship.
		Related To Module	
			Related To ID: The ID for the record you are relating.
			Related To Module:

Import File Template

The Import File Template is a very useful tool for building your import file from another source or from scratch. The template for any module can be found on the Upload Import File page, which is either the first or second page of the wizard, depending on the module.

The purpose of this file is to let you know what format Sugar is going to be looking for when you perform your import. The file contains all fields for a given module, regardless of if they show on any of your layouts. The file is also properly formatted and all settings are ready for the import. Upon opening the template, you will see a few example lines of either actual records from your instance, or, "demo data" if you have not yet performed an import. The template also contains instructions on how it is used.

It is best to use the format supplied in this template whenever possible to make your import process as seamless as possible.

Saving Field Mappings

When importing data, there can be times where you will be using the same import file format. If this file was not exported from Sugar, that likely means that you have to re-map most of the fields on the Confirm Field Mappings screen of the Import Wizard. To save time in the future, you can use the Import Wizard's pre-set import settings.

On the "Check for Possible Duplicates" page of the wizard, which is the last page before performing your import, there is a text box where you can name the import settings that you have used on this import.

Once you click "Import Now", this mapping will be saved and available for your use in future imports.

This mapping is now saved for your user and will appear on the Upload Import File page of the Import Wizard. This will include two buttons for "Publish" and "Delete".

Publish : Clicking this option will make your mapping available to all users. The Publish button will change to "Un-Publish" so that you can stop other users from using the templated mapping. When it is published, it will appear as an option in the same section for other users when they perform an import.

Delete : This button will remove the pre-set import mapping for all users. This action cannot be undone.

Detecting Duplicates

During an Import, Sugar's Import Wizard includes the functionality to check for duplicate records. When enabled, Sugar will check to see if a record already exists in Sugar with the given criteria. When checking for duplicates, Sugar will mark any record as a duplicate if it cross references against any of the duplicate fields. For example, when importing Contacts, if you select Last Name and Email Address as your duplicate check fields, any record that has a matching last name and/or a matching email address to an existing contact in Sugar will be marked as a

duplicate.

Fields to Check	Available Fields
Last Name	Assigned User ID
Email Address	First Name
	Full Name
	Reports To ID

The duplicate check fields used in each module differ depending on what fields are available to the module. Not all fields are used or available in the duplicate check and are pre-determined based off of system-defined indexes.

If your import file has any duplicate records based off the fields you elect to verify against, the first record will be imported, and then all subsequent records in the file matching the duplicate criteria will be flagged.

Any duplicates will show as such on the final page of the import. You will also have an option to download the duplicates so that they can be manually cross referenced to verify if they are actually duplicates. If they are not, simply re-run the import process without selecting any fields on the "Check for Possible Duplicates" page.
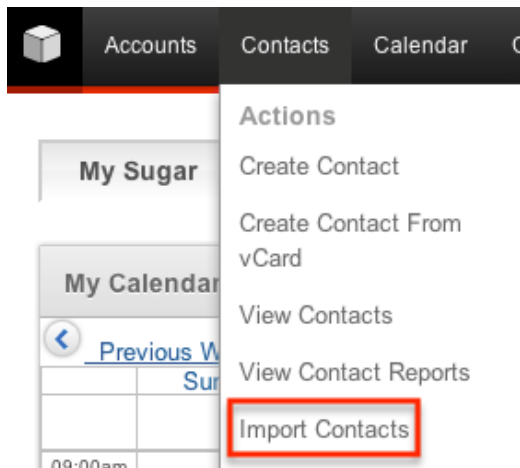
External Data Sources

When importing data to Sugar, there are other options than importing a data file exported from another source. Sugar offers an option to directly connect to an outside application or service though the Import Wizard and have Sugar pull the information directly from the source. This functionality is currently only available for Google Contacts.
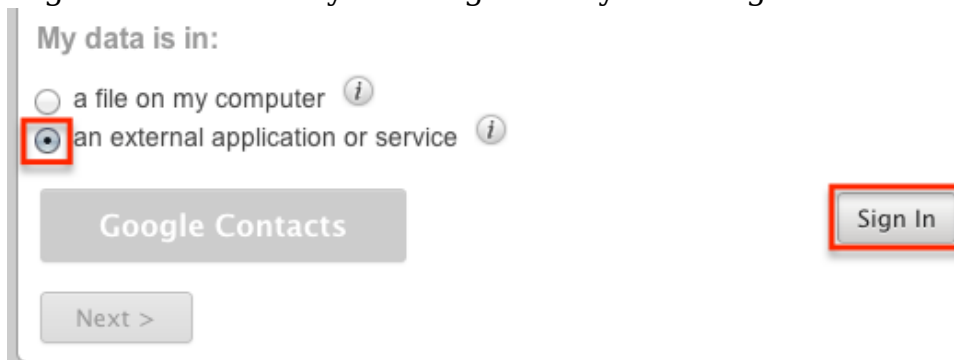
The import process is very similar to what is described above, but with some differences to speed up the process for users who would like to import all contact data into Sugar
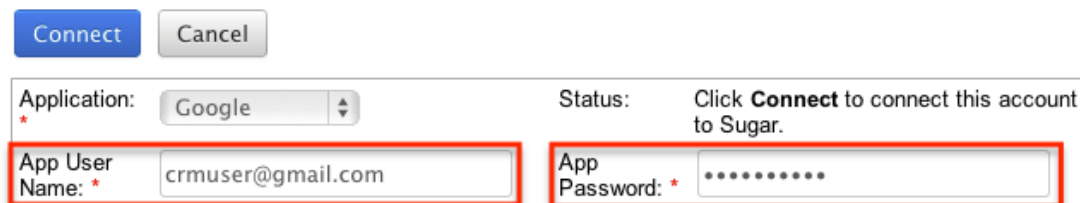
Importing Data From Google

1. Navigate to the module tab for the person-type module that you are importing into and select the import option. This will open the Import Wizard and bring you to the "Select Data Source" screen.
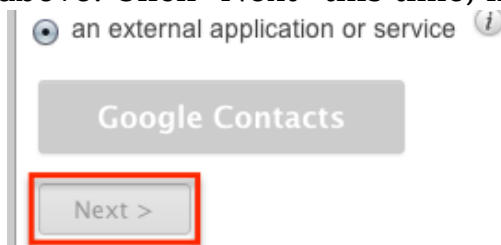
2. On the Select Data Source screen, navigate to the "My data is in:" section and choose the option for "an external application or service". This will activate a "Sign In" button for you to sign in to your Google account.

3. Fill in your user name and password for the Google account you would like to connect to and click "Connect".

4. Upon connecting, you will be brought to your user profile, on the "External Accounts" tab. Navigate back to the import screen, repeating steps 1 and 2 above. Click "Next" this time, instead of Sign In.

5. This will direct you to the "Confirm External Source Properties" page, which is very similar to the mapping screen from a data import from a file on your computer. Change any mapping necessary specific to your Google account and your Sugar instance. Any field in the Module Field column marked with an asterisk (*) is a required field and must be imported.

6. There is no duplicate check for this type of import, but names and email addresses are automatically checked for duplicates.
7. Click "Import Now" after you have completed your mapping.
8. On the "View Import Results" screen, you will see that all of your Google contacts have been successfully imported into Sugar.
9. Any records that were not imported due to error can be exported from Sugar and then re-imported if need be using the "Download list of rows that were not imported" link

10. To review the standard import process to re-import any additional records please review the [Importing New Records](#) section of this documentation.

Admin Import Wizard

Administrators have special functionality available in Sugar that may not be available for all other users. One of these is access to the Admin Import Wizard. In the "Admin" menu, under the "System" panel, there is a link for "Import Wizard".

Clicking this option will bring you to the Import Wizard, similar to the one for specific modules. However, the first step here is for "Select Data Source", where you will need to select the module you wish to import data. The dropdown provided includes options for all importable modules in one convenient location. Once you select the module from the list, click "Next" and you will be directed to the standard import wizard where you can [import new records](#) or [update existing ones](#).

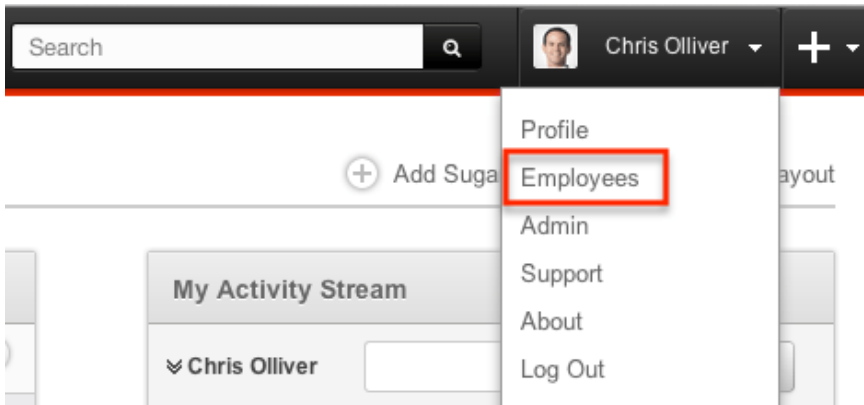Last Modified: 09/26/2015 06:25pm

Employees

Overview

Sugar's Employees module consists of individual people within your organization. The Employees module allows you to see a list of all employees, their contact information, and their employment status in one convenient location. Employee records are typically created when a user record is created, but users with administrative access can also add non-user employees. This means that, typically, all users will be listed as employees, but not all employees are necessarily Sugar users.

For more information on having administrators create employee records in Sugar, please refer to the Employee Management documentation in the Administration guide.

For more information on having administrators create user records in Sugar, please refer to the User Management documentation in the Administration guide.

To access the Employees module, click on your user name in the top right corner of any page in Sugar and click on the Employees menu option.

Employee Fields

The Employees module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Fields documentation in the Administration guide.
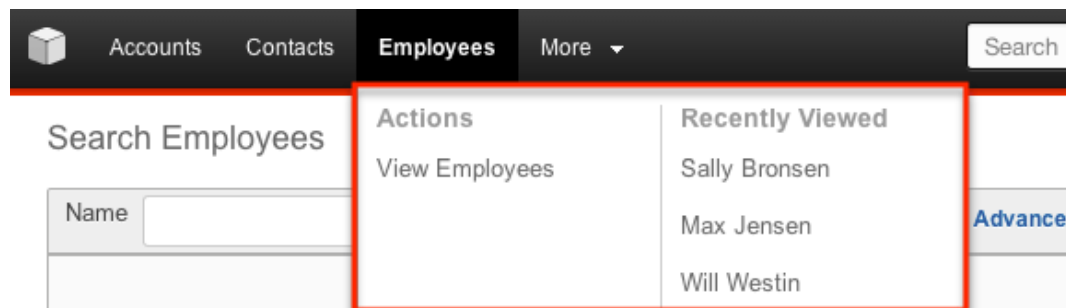
Field	Description
City	The city of the employee's address

Country	The country of the employee's address
Department	The department where this employee works
Email Address	The employee's email address
Employee Status	The employee's employment status in the organization, either: Active, Terminated, or Leave of Absence
Fax	The employee's fax number
First Name	The employee's first name
Home Phone	The employee's home phone number
IM Name	The employee's instant message screen name
IM Type	The employee's instant message client type
Last Name	The employee's last name
Mobile	The employee's mobile phone number
Notes	A description or other information about this employee
Office Phone	The employee's office phone number and extension
Other	An additional phone number for the employee
Picture	A picture, headshot, or identifying image of the employee
Primary Address	The number and street of the employee's address
Postal Code	The postal code of the employee's address
Reports to	This field list's the employee's manager, if the manager is a Sugar user
State	The state of the employee's address
Title	The employee's job title

Employees Module Tab

The Employees module tab is located on the dropdown bar accessed by clicking your user name in the top right of any Sugar screen. Click the Employees option to access the Employees list view and have the Employees module tab appear. Once

displayed, you may hover on the tab to display the action for View Employees and the Recently Viewed menu. The View Employees option will take you to the Employees list view . The Recently Viewed menu displays the list of employees you last viewed in the module.

Viewing Employees

There are various options available for viewing employee records in Sugar including via Employees list view, Employees detail view, and the Employees Recently Viewed menu. Please note that you will only be able to access these views by first clicking on the Employees button after clicking on your user name in the top right side of Sugar.
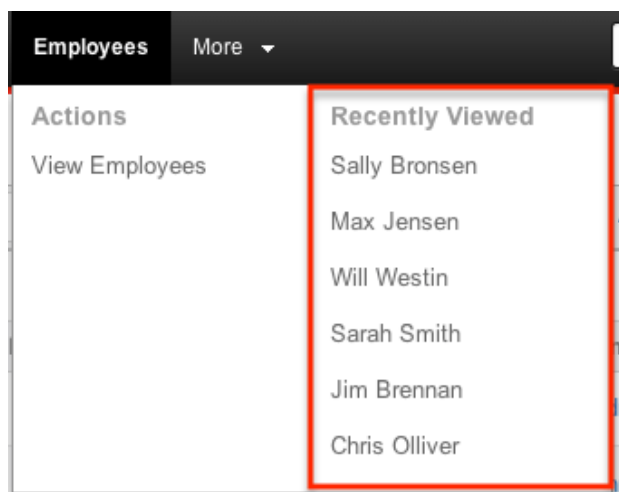
Viewing Via List View

The Employees list view displays all employee records meeting the current search criteria. To access the list view, simply click the Employees option under your user name on the module tab bar. While list view shows key employee fields, you can click the employee's name to open the record in detail view. For more information on viewing employees via list view, please refer to the Employees List View section of this documentation.

Viewing Via Detail View

The Employees detail view displays thorough employee information by showing all employee fields. The detail view can be reached by clicking an employee record's link from the Employees list view. For more information on viewing employees via detail view, please refer to the Employees Detail View section of this documentation.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which employees you have recently viewed. Hover on the [Employees module tab](#) to see a list of your most recently viewed employees and click each name to open the employees in [detail view](#) .

Searching Employees

The Employees list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Employees list view below. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the [Search](#) documentation.
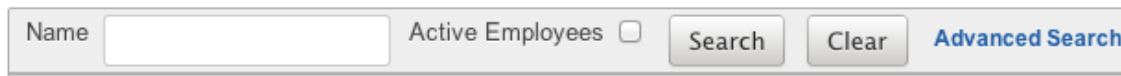
Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.

The buttons and checkboxes available in Basic Search panel have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear: Click the Clear button to clear all criteria from the searchable fields.
- Active Employees : Select this box to return only records where Employee Status is Active.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "Active Employees" and enter an employee's name, Sugar will only return employee records with a matching name that are active. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all employee records, simply click "Clear" and then "Search" to perform a blank search with no filters.

Administrators can configure what fields appear on the Employees Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Advanced Search

Advanced Search offers a more in-depth search experience than Basic Search including additional fields, layout options, and saved search capability. From the Advanced search panel, you can click "Basic Search" for simplified searching.

The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

- Search : Click the Search button or press your Return/Enter key to perform the search.
- Clear : Click the Clear button to clear all criteria from the searchable fields.
- Active Employees: Select this box to return only records where Employee Status is Active.
- Layout Options : Use the expandable Layout Options section to configure your list view. For more information, please refer to the Layout Options section of the Search documentation.
- Saved Searches : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section of the Search documentation.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "Active Employees" and enter an employee's name, Sugar will only return employee records with a matching name that are active. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all employee records, simply click "Clear" and then "Search" to perform a blank search with no filters.

Administrators can configure what fields appear o n the Employees Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Employees List View

The Employees list view displays all employee records meeting the current search criteria. You can view the basic details of each employee within the field columns.
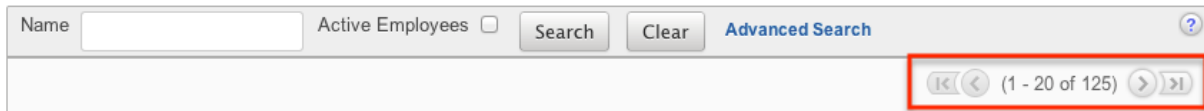
You have the option to change what fields are displayed in list view by configuring your layout options in the Employees Advanced Search. For more information on configuring your list view, please refer to the Layout Options section of the Search documentation. Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Pagination

List view displays the current search results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. To the right just below the search panel you can see which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page

and Last Page buttons allow you to skip to the beginning or the end of your current results.

By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.

Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header, noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time. You can also set a default order-by column using the layout options in Advanced Search. For more information on setting a default column sort, please refer to the [Layout Options](#) section of the Search documentation.

Employees Detail View

The Employees detail view displays thorough employee information by way of all employee fields grouped into one page.

Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Next or Previous Record

On the upper right of the Employees detail view, there are two buttons that allow you to page through each employee in the Employees list view's current search results. Clicking the Previous button displays the previous employee of the current search results while clicking the Next button displays the next employee of the

current search results. The text in between shows which employee result you are currently viewing within the total number of current results.

» Jim Brennan

| Employee Status: | Active | | Picture: | |
| Name: | Jim Brennan | | | |

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Mobile Browser

Overview

Sugar mobile browser enables users to access the HTML view of their Sugar instance via mobile devices (e.g. iPhone, Android, etc.) to perform various actions and manage their records. Similar to the desktop Sugar application, you will be able to access all records that are assigned to you, your teams, and your direct reports for various modules (e.g. Accounts, Contacts, Calls, etc.). Please note that the Calendar, Emails, Forecasts, Reports, and Target Lists module are not available for the mobile browser. This documentation will cover how to access, navigate, and utilize your Sugar instance via the mobile browser.

Accessing Sugar Via Mobile Browser

Users can access their Sugar instance via the mobile browser from their mobile device. To access your Sugar account, enter your instance URL (e.g. https://example.sugarondemand.com) in your mobile browser to load Sugar's login screen. Please note that if you are unable to access Sugar via the mobile browser using your instance URL, append "&mobile=1" to the end of your URL then try reloading the page.

Once the login page loads, enter the same login credentials (username and password) you normally use to access your Sugar instance in a desktop browser then click "Login".

Mobile Dashboard

The Mobile dashboard allows users to navigate to various modules (e.g. Contacts, Accounts, Leads, etc.), view currently scheduled activities, as well as access their recently viewed records. To navigate to a modules page, simply select the specific module from the Select a module dropdown list then click "Go".Currently scheduled activities will appear under the Today's Activities section and you can access the records detail view by clicking the records name. The Recently Viewed section displays the list of records you last viewed in Sugar. You can access the records detail view by clicking the records name in the Recently Viewed list. The dashboard also provides direct access to the Employees page by clicking the Employees link at the bottom left of the page. To log out of Sugar, simply click "Log Out" from either the upper right or bottom left of the dashboard.

Please note that you can easily navigate back to the dashboard by clicking the Dashboard link on the bottom left of any Sugar page you are currently on.

Creating Via Mobile Browser

Users can create new records via the mobile browser by navigating to the specific module's page then clicking the Create button. This opens up the edit view layout which allows you to enter in all the relevant information for the new record. Please note that administrators can configure the Edit View layout via Admin > Studio from the desktop Sugar application. For more information on configuring mobile layouts, please refer to the Studio documentation in the Administration guide.

The following steps cover creating a new contact via the mobile browser as an example:

1. Navigate to the Contacts module by selecting "Contacts" in the Select a module dropdown list then clicking "Go".
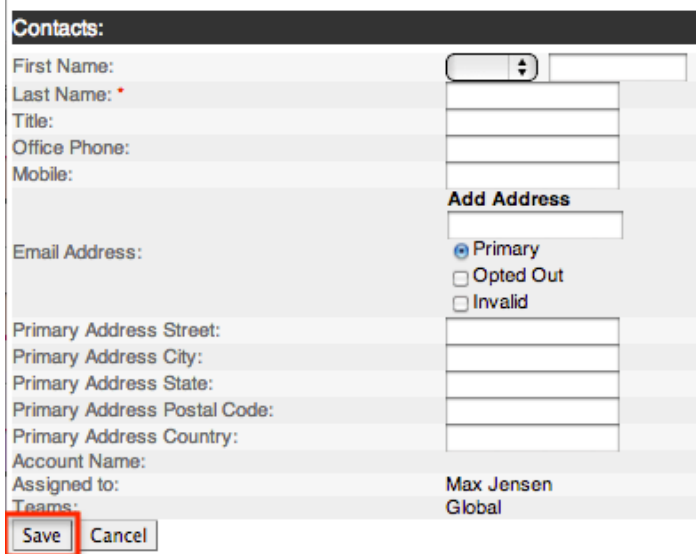

2. Click the Create button beneath the Search form.

3. Enter appropriate values for the fields in the Edit View layout. All required fields are marked with a red asterisk and must be completed prior to saving.
4. Once the necessary information is entered, click "Save".

Viewing Via Mobile Browser

There are various options available for viewing records via the mobile browser including via the Mobile list view, Mobile detail view, and Mobile dashboard. As you view records within the mobile browser, you can go back to previously viewed records by clicking the Back link on the bottom left of any Sugar page or the Back button on your browser. Please keep in mind that you will only be able to see records as allowed by your team membership. For more information on teams, please refer to the [Team Management](#)documentation in the Administration guide.

Viewing Via List View

The Mobile list view displays all records for the specific module you are viewing which meet the current search criteria. To access the list view, you will first need to select the module (e.g. Contacts, Leads, etc.) from the Select a module dropdown list at the top of the page then click "Go". Once in the module's page, the search form will display allowing you to enter in a keyword in the searchable field (e.g. name, subject, etc.) to pull up records matching the criteria. Please note

that administrators can configure what fields appear on the search form via Admin > Studio from the desktop Sugar application. For more information on editing mobile search layouts, please refer to the [Studio](#) documentation in the Administration guide.To see all records to which you have access to in the module, simply click "Search" without entering any search criteria(s). While list view shows key record fields, you can click the specific record's name to open the record in detail view. For more information on viewing records via list view, please refer to the [Mobile List View](#) section of this documentation.

Viewing Via Detail View

The Mobile detail view displays thorough information regarding the record including all the fields followed by the Related Information subpanel, which displays the related records belonging to various modules. Please note that administratorscan configure what fields appear on the detail view layout via Admin > Studio from the desktop Sugar application. For more information on editing mobile layouts, please refer to the [Studio](#) documentation in the Administration guide.The detail view can be reached by clicking the module record's link from the mobile list view or from anywhere in the mobile browser where you see the record's name as a hyperlink. For more information on viewing record's via detail view, please refer to the [Mobile Detail View](#)section of this documentation.

Viewing Via Dashboard

The Mobile dashboard displays a list of your currently scheduled activities as well as recently viewed records in Sugar. You can click each record's name in the Today's Activities and Recently Viewed list to access the record's detail view. For more information on the Mobile dashboard, please refer to the [Mobile Dashboard](#) section of this documentation.

Searching Via Mobile Browser

When you navigate to a module's page (e.g. Accounts, Contacts, etc.) within the mobile browser, the Search form will display first. Mobile search helps you to locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the list view. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. Users also have the option to search only records assigned to them by selecting the My Items checkbox that appears below the search field(s).

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "My Items" and enter a contact name, Sugar will only return contact records with a matching name that are assigned to you. To see all records to which you have access, simply clear any values in the search form then click "Search" to perform a blank search with no filters. Please note that you will only be able to see records as allowed by your team membership. For more information on teams, please refer to the [Team Management](#)documentation in the Administration guide.

Administrators have the ability to configure what fields appear on the search form

via Admin > Studio from the desktop Sugar application. For more information on editing mobile search layouts, please refer to the [Studio](#)documentation in the Administration guide.
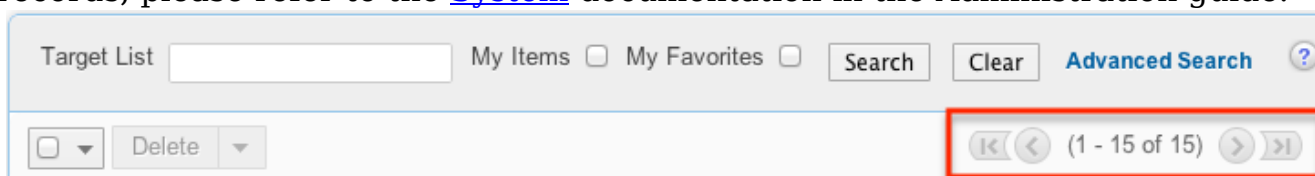
Mobile List View

The Mobile list view displays all records meeting the current search criteria and to which you have access. You can view the basic details of each record within the field columns of the list view. Please note that you will only be able to see records as allowed by your team membership. For more information on teams, please refer to the [Team Management](#) documentation in the Administration guide.

Users with administrator or developer access have the ability to change what fields are visible in the list view via Admin > Studio from the desktop Sugar application. For more information on editing mobile layouts, please refer to the [Studio](#) documentation in the Administration guide.

Pagination

List view displays the current search results broken into pages that you can scroll through rather than displaying potentially hundreds of rows at once. To the right just below the list view you can see which records of the total results set are currently being displayed. The Next and Previous links can be used to scroll through the records page-by-page.

By default, the Mobile list view displays 10 records per page, but administrators can change the number of records displayed via Admin > Mobile from the desktop Sugar application. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration guide.

Mobile Detail View

The Mobile detail view displays thorough information regarding the module record including all the fields. Please note that administrators can configure what fields appear on the detail view layout via Admin > Studio from the desktop Sugar application. For more information on configuring fields for the mobile layout, please refer to the [Studio](#) documentation in the Administration guide. You can also view the related records (Accounts, Opportunities, etc.) via subpanels under the

Related Information section. Please note that subpanels will only appear on the detail view if there is a related record. The detail view can be reached by clicking the record's link from the mobile list view, mobile dashboard, or anywhere in the mobile browser where you see the record's name as a hyperlink.

To access a specific module record, you will need to select the module (e.g. Accounts, Contacts, etc.) from the Select a module dropdown list on the upper left of Sugar then click "Go". Once in the modules page, you can either perform a search for a specific record or click "Search" with no search filters entered to return all records to which you have access. Once the search is complete, the list view will display the relevant results and you can click the record name to access the detail view.

Please note that you will only be able to view a record according to your team membership. For more information on teams, please refer to the [Team Management](#) documentation in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio from the desktop Sugar application. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.
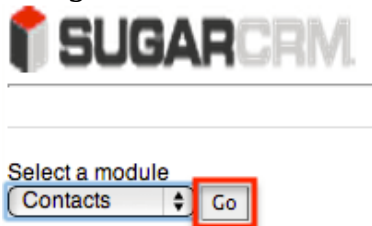

Related Information

The Related Information section of the Mobile detail view displays related records belonging to various modules. Relationships between records allow you to connect relevant records together. You can viewthe details of a related record by clicking the record's name in the specific module's subpanel. Please note that administrators have the ability to disable modules via Admin > Mobile from the desktop Sugar application. Please reach out to your administrator if you do not see a related module record appear in detail view. For more information on disabling modules for the mobile browser, please refer to the [System](#) documentation.
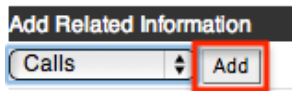
Add Related Information

Users can also create related module records (e.g. calls, meetings, etc.) via a record's detail view under the Add Related Information section.

The following steps cover creating a new call record in the Contacts detail view as an example:
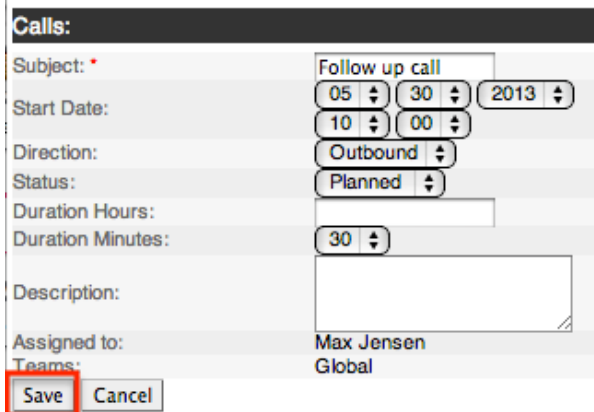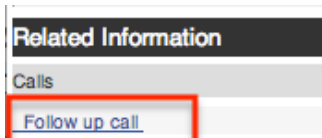
1. Navigate to a contact record's [detail view](#) .

2. Scroll to the Add Related Information section at the bottom of the detail view page.
   - Select "Calls" from the dropdown list then click "Add".

3. Enter appropriate values for the fields in the edit view layout then click "Save".

The newly created record will appear within the Calls subpanel of the Related Information section.
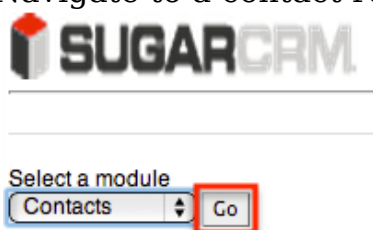

Editing Via Mobile Browser

Records may be edited at any time to update or add information to the specific record. You can make changes to existing records via the Edit View layout from the mobile browser. Edit view is available within each module and includes all of the fields you should need to edit the record.
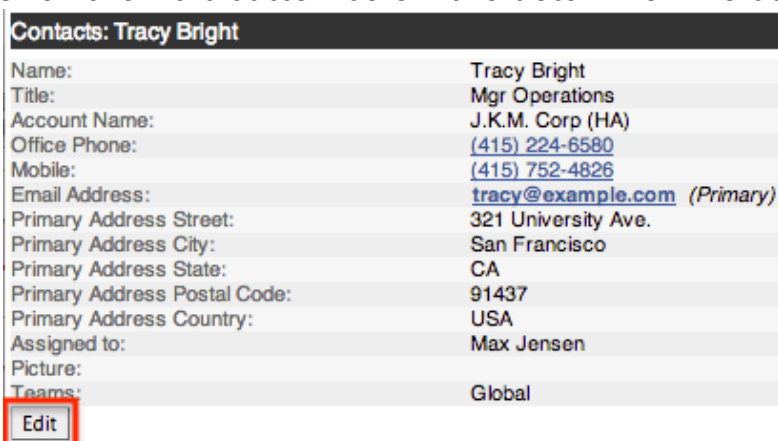
Administrators in Sugar may configure the edit view layout via Admin > Studio from the desktop Sugar application. For more information on configuring mobile layouts, please refer to the Studio documentation in the Administration guide.

The following steps cover editing a contact via the mobile browser as an example:

1. Navigate to a contact record's detail view .

2. Click the Edit button below the detail view fields.

3. Update the necessary fields then click "Save" to preserve your changes.

Contacts: Tracy Bright

First Name:	Ms. ⬍ Tracy
Last Name: *	Bright
Title:	Mgr Operations
Office Phone:	(415) 224-6580
Mobile:	(415) 752-4826
Email Address:	tracy@example.com ⦿ Primary ☐ Opted Out ☐ Invalid ☐ Delete **Add Address** ⬚ ○ Primary ☐ Opted Out ☐ Invalid
Primary Address Street:	321 University Ave.
Primary Address City:	San Francisco
Primary Address State:	CA
Primary Address Postal Code:	91437
Primary Address Country:	USA
Account Name:	J.K.M. Corp (HA)
Assigned to:	Max Jensen
Teams:	Global

Save   Cancel

Last Modified: 09/26/2015 06:25pm